



STATE OF MICHIGAN
**Department
of Human
Services**

MICHIGAN WEATHERIZATION
ASSISTANCE PROGRAM

Memorandum

**Bureau of Community Action and
Economic Opportunity (BCAEO)**
235 S. Grand Ave., Suite 1314
P.O. Box 30037
Lansing, MI 48909
www.michigan.gov/dhs

Program Guidance (PG): 09-00

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **August 27, 2009**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Introduction of Program Guidance Memorandums**

Response Due: None

The Weatherization Division within the Bureau of Community Action and Economic Opportunity (BCAEO) is in the process of unprecedented expansion and responsibility under the American Recovery and Reinvestment Act (ARRA). In response to this rapid growth and activity, a new Weatherization Division Manager position was developed within BCAEO to provide oversight and program direction to the state's administration of the Weatherization Program. As the recently selected Weatherization Division Manager, one of my highest priorities is to improve the consistency and effectiveness of the Weatherization Division's communications to the network. In an effort to do this, the Weatherization Division will be making some procedural and protocol changes related to how we communicate with the network as follows:

- The Weatherization Division Manager will now be the primary point of contact for all matters dealing with either Program or Technical aspects of weatherization. Effective immediately, please submit any requests for weatherization policy clarification, certification, etc. to Diane Holley at holleyd@michigan.gov or 517-335-6070.
- Official program guidance will now be delivered via **Program Guidance Memorandums**. Program guidance includes clarifications, instructions, and other communications that fall outside of the scope of regular policy that would be included in the CSPM, TWP, etc. The use of Program Guidance Memorandums will assist with centralizing our communications and ensuring that the network is receiving official information in a manner that is consistent and universal.

In addition to the changes outlined above, we are planning additional steps to better utilize technology as a communication tool. These plans include the use of a centralized weatherization e-mail account, more effective use of the internet and our website to deliver and house weatherization information, and better use of technology as a reporting and feedback mechanism. We will keep you posted as these additional tools become available.

I look forward to our continued partnership as we move forward and I welcome your suggestions and input as we continue to make Weatherization Work in Michigan.

Number and Status of Previous PG Memos Issued on the Same Subject: None

Contact Office: Bureau of Community Action & Economic Opportunity

Telephone Number and E-mail address of Contact: Diane Holley 517-335-6070

Holleyd@michigan.gov

Distribution: Executive Directors and Local Weatherization Operators

Obsolete Date: N/A

cc: All BCAEO Staff

Working Together To Make Michigan Weatherization Work



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Program Guidance (PG): 09-01

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **8/27/09**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Weatherization Assistant 8.4.1.4 – Statewide Application Start Date**

The State of Michigan Weatherization Assistance Program (WAP) recently received approval of the site-build priorities based upon Weatherization Assistant 8.4.1.4 Technical staff completed 84 audits with the NEAT 7.4.3.3 program. These were submitted in May to the U.S. Department of Energy for review. All audits were rejected due to the use of an obsolete audit tool (NEAT 7.4.3.3).

Technical staff subsequently conducted 84 new audits using NEAT 8.4.1.4. The site-build priorities were approved based upon a requirement that the Michigan WAP will conduct future audits using Weatherization Assistant 8.4.1.4 (WA 8.4.1.4) version or newer. Therefore the Michigan Weatherization Assistance Program will require the use of the National Energy Audit Tool (NEAT/MHEA) 8.4.1.4 version **effective October 1, 2009**. Agencies should start the transition to the newer version in September, 2009 to ensure compliance with the October 1 start date.

A WA 8.4.1.4 training will be offered on September 8 & 9 at the Lansing training center. This is not the WA 8 class which is taught in the 4-day Level II Inspector curriculum. This class will be geared to program managers responsible for maintaining WA 8.4.1.4 with the appropriate information including pricing, fuel cost etc. Instructions regarding registration for this training will be sent in a separate training notice.

Level II Inspector training includes WA 8.4.1.4 classes. These are scheduled to be conducted at the Lansing training center on September 28, 29, 30 and October 1. Registration information for this training will be included in separate training notices.

Bureau staff is also working with the Michigan Community Action Agency Association (MCAAA) to contract for a trainer(s) to provide onsite training and technical assistance during this transition.

Agencies requiring assistance to transition into the WA 8.4.1.4 should contact the Bureau Technical Specialist staff.

Number and Status of Previous PG Memos Issued on the Same Subject: None

Contact Office: Bureau of Community Action and Economic Opportunity

Telephone Number and E-mail address of Contact: Diane Holley - 517-335-6070

Holleyd@michigan.gov

Distribution: Executive Directors and Local Weatherization Operators

Obsolete Date: N/A

cc: All BCAEO Staff

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ASSISTANCE PROGRAM

Memorandum

**Bureau of Community Action and
Economic Development (BCAEO)**
235 S. Grand Ave., Suite 1314
P.O. Box 30037
Lansing, MI 48909
www.michigan.gov/dhs

Program Guidance (PG): 09-02

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **9/11/09**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Michigan Technical Weatherization Procedures Manual**

Response Due: None

During the MCAAA Summer Conference, Bureau staff indicated that the second draft of the Weatherization Program Procedures Manual (WPPM) would be distributed to the weatherization network for comment within two weeks. Unfortunately, with the many priorities that staff has been focusing on, this task has not been completed. However, in lieu of drafting and updating another manual, and based on suggestions from the network, we are proposing that Michigan adopt the Midwest Best Practices Field Guide with an addendum that addresses Michigan-specific restrictions and clarifications, instead of proceeding with the WPPM.

Included with this email communication is a pdf copy of the Midwest Best Practices Field Guide. We are requesting agency weatherization staff to review the guide, and provide comments and/or questions on any areas you anticipate conflicts with Michigan-specific code requirements, Michigan Board of Mechanical Rules, etc. Please compile this list and submit via email to: Weatherization@michigan.gov by Friday, October 2, 2009.

We appreciate your assistance with this project, and look forward to having a final resource document available to the network soon.

Number and Status of Previous PG Memos Issued on the Same Subject: None

Contact Office: Bureau of Community Action and Economic Opportunity

Telephone Number and E-mail address of Contact: Diane Holley- 517-335-6070

Distribution: Executive Directors and Local Weatherization Operators

Obsolete Date: N/A

cc: All BCAEO Staff



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www.michigan.gov/dhs

Program Guidance (PG): 09-03

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **9/11/09**

From: **Diane Holley, Weatherization Division Manager**

Subject: **DOE RFQs and Davis Bacon Compliance**

Response Due: None

Many of you have submitted your DOE ARRA RFQ packages for review and to date 13 are posted to the MCAAA website. Please be reminded that all agencies must submit an RFQ package for review and approval, and complete the contractor selection process, prior to beginning DOE ARRA production. The Michigan Recovery Office is requiring that a listing of all selected contractors be posted. I do not have the details about how this process will work, but will update you as soon as I do.

Once your RFQ has been approved, and as you move forward with your contractor selection process, understand that you and each contractor will be responsible for local Davis Bacon Act compliance. DOE recently published a Q & A regarding Davis Bacon and you can access this information at:

http://apps1.eere.energy.gov/weatherization/davis_bacon_faqs.cfm

Bureau staff will be participating in a WIPFLI webinar Tuesday, September 15th. The webinar is going to include a Davis Bacon toolkit. The Bureau will disseminate information from the webinar to the network as additional guidance. Each agency is responsible for training contractors in Davis Bacon compliance. The Bureau will provide any resource information we become aware of.

Each agency will be required to collect all weekly certified payroll records and submit to the Bureau weekly. All entities involved in this process must use the WH-347 Payroll form provided by the Department of Labor to ensure consistent reporting elements and to ensure uniform, applicable reporting instructions. This signed completed form satisfies the payroll and certification requirements. The form is available at:

<http://www.dol.gov/esa/whd/forms/wh347.pdf>

Submit your signed weekly payroll certification forms to:

BCAEO
Suite 1314
Michigan Department of Human Services
PO Box 30037
Lansing, MI 48909-7537
Attention: Diane Holley/Davis Bacon

Bureau staff will not forward for payment any production related expenditures until the appropriate payroll records are received.

NOTE: You may still include production costs in the estimated billings you are submitting for the year end closing process.

Number and Status of Previous PG Memos Issued on the Same Subject: None

Contact Office: Bureau of Community Action and Economic Opportunity

Telephone Number and E-mail address of Contact: Diane Holley- 517-335-6070

Distribution: Executive Directors and Local Weatherization Operators

Obsolete Date: N/A

cc: All BCAEO Staff

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Program Guidance (PG): 09-04

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **10/14/09**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Weatherizing Homes with Multiple Fund Sources**

Response Due: None

The Bureau has received several questions regarding the use of multiple fund sources on units being weatherized. Please note that it is acceptable to use multiple fund sources, such as LIHEAP, MPSC, or Energy Optimization to weatherize units that are also being funded with either DOE PY09 or DOE-S funds. However, regular DOE PY09 funds and DOE-S funds should never be used on the same job for labor and materials. To maintain separate accounting as required by the American Recovery and Reinvestment Act (ARRA), units weatherized with any DOE-S funds cannot be weatherized in conjunction with regular DOE PY09 funds. It continues to be acceptable, however, to supplement regular DOE PY09 or DOE-S funds with other fund sources. As always, when multiple funds sources are used, each source must be distinguishable and traceable to source documentation. And finally, if you do use multiple funding sources on a job and any dollar of that weatherization work (i.e. labor and materials) is funded by DOE-ARRA, you must be in compliance with Davis Bacon requirements for all work completed on that job.

Number and Status of Previous PG Memos Issued on the Same Subject: None

Contact Office: Bureau of Community Action and Economic Opportunity

Telephone Number and E-mail address of Contact: Diane Holley- 517-335-6070,
holleyd@michigan.gov

Distribution: Executive Directors and Local Weatherization Operators

Obsolete Date: N/A

cc: All BCAEO Staff

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Program Guidance (PG): 09-05

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **October 22, 2009**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Michigan Inspector Certification Process**

Response Due: None

Per Section 4502 of the Technical Weatherization Policy Manual (TWP):

"Weatherization inspector training/testing will be offered by the State of Michigan. New inspectors shall attend and pass these training sessions prior to performing any weatherization inspections."

This program guidance will serve as a summary of the inspector certification process.

Currently, due to the demand for new inspectors to be certified, the Bureau has increased the frequency of the Inspector Certification training available to the network. Level I and II training is offered each month. All inspector candidates must first be sponsored by one of the Local Weatherization Operator agencies in the network. The sponsoring agency will be responsible for the field training necessary to prepare candidates sufficiently enough to be as fully equipped for classroom training as possible. This training should include the agency specific paperwork and protocol used during the inspection process.

The U.S. Department of Energy recommends that a sponsoring agency secure a retention agreement with each sponsored candidate. An example of this agreement is included as **Attachment A**. Please note that this is a sample agreement and each agency may want to add or refine language. For example, an agency may insert items in section 1.b. to further list the types of costs associated with training. The time frame of 12 months shown in section 3 is also just a guideline and can be adjusted to more accurately align the funds spent on training with the retention period.

Experience indicates a minimum of 4-6 weeks of actual field practice will help prepare candidates for the Level I class. It is an allowable DOE expense to pay said candidate a stipend for shadowing experienced, certified inspectors during this time.

Inspector training consists of three components:

- Level I Training - Required
- Level II Training - Optional
- Inspector Field Observation Test - Required

Level I Training

Inspector candidates must attend two weeks of the Level I Inspector Certification training. The Level I training curriculum is included as **Attachment B**. Each week of the Level I training is a four-day week.

Inspector candidates are required to take an exam the last day of each week and must pass with a minimum score of 70%.

Candidates who have successfully completed both weeks of Level I training are encouraged to return to the sponsoring agency and work with certified inspectors observing and conducting inspections. Based on the observation of numerous inspector candidates to date, agencies are encouraged to train inspector candidates on the paperwork portion of the inspection process, the completion of the audit tool, the set up of the blower door test, and preparation of all appropriate client notices. Candidates should be prepared to conduct DOE required health and safety tests in the DOE prescribed order. Agencies may use their DOE funding to pay for a certified inspector to work with an inspector candidate during this period.

Inspector Certification Field Test

Once the inspector candidate successfully completes Level I training and feels prepared to be observed in a field test, she/he can request a field test be scheduled. This request should be submitted via email to me at holleyd@michigan.gov. Requests will be logged as received and assigned to a proctor. The test proctor will observe the inspector candidate throughout the field test process and in cases where an actual program client is not in attendance, will act as the client to provide as closely as possible a real life inspection experience. Once the candidate successfully completes the Level I classroom training and passes the field test, she/he will become a Michigan certified inspector and will be qualified to conduct independent inspections. A candidate may choose to take advantage of Level II training prior to requesting an inspector certification field test.

Level II Training

Inspector candidates are not required to complete Level II training to request a field test. Level II Inspector training is a 4-day training on the National Energy Audit Tool (NEAT) and Manufactured Home Energy Audit Tool (MHEA). Level II training will prepare inspector candidates to perform the NEAT/MHEA set-up and subsequent updates for the agency and conduct a combustion appliance flue gas analysis. The Level II training curriculum is included as part of **Attachment B**.

Test-Out Option

Inspector candidates may exercise the option to test out of both Level I and Level II training. To ensure that test-out candidates have the same amount of time to take the tests as the class attendees, the test out option is offered the last day of the classroom training. If the candidate passes the written exam, she/he may either go on to the next level of training, or request the field observation. DHS Bureau staff is working on an online test-out process and information about this will be shared with the network once available.

Test House Criteria

Field test requests are logged and scheduled as closely as possible in the order received. Currently the Bureau has rented two training houses that will be used for the inspector field observation testing as well as hands-on technical training. These houses are located in Marquette and Auburn. Keys are available to the Marquette house currently and we anticipate getting the final rental agreement signed and keys to the Auburn house soon. Staff continues to work on getting training houses established in the greater Lansing and the southwest areas of the state. In the meantime, if these locations are not convenient for an agency/inspector candidate, the agency can secure a client house for the process. The test house criteria is included in **Attachment C**. Please note: If possible, agency staff should inspect the house prior to the test day to ensure there are no gas leaks. Bureau staff has had numerous field observations delayed and/or ended due to gas leak problems.

Release of Test Results to Sponsoring Agency

The sponsoring agency can obtain scoring information from the BCAEO only if the inspector candidate has signed a release form. An example of a release statement is included as **Attachment D**.

Test Protocol

Candidates will receive a notice with the date and time of the scheduled field observation. It is critical that candidates arrive at the test house at the time indicated to ensure enough time to complete the entire process. Candidates will have three (3) hours on site to complete the inspection and twenty-four (24) hours from the conclusion of the on-site inspection to submit, via email, the complete inspection documentation. Candidates will be provided a Candidate Field Test Observation Process form that will record the date and time all documentation must be submitted. If the inspector candidate must travel a significant distance to reach the test house, a request to adjust the 24-hour period should be made to the DHS BCAEO proctor prior to the test date. Candidates not submitting all required documentations within the prescribed timeframes will not achieve certification.

The test areas on which candidates will be evaluated are included in **Attachment E**. The required documentation is listed on the Michigan Weatherization Assistance Program Inspector Candidate Field Test form provided to each candidate and included as **Attachment F**.

Scoring

The following criteria will constitute a passing field observation and result in certification:

The inspector candidate achieves an overall score of 70% or above AND satisfactorily completes the five critical skill items listed below.

Critical Skill Items

- A. Performs all required health and safety tests in the DOE prescribed order
- B. Completes the Blower Door test- including set-up and testing
- C. Satisfactorily completes the CAZ testing
- D. Conducts all required Lead Safe Weatherization practices during the inspection
- E. Prepares the work order and it is reflected correctly in the NEAT output report

Note: Failure to satisfactorily perform any or all of Items A-E will result in a failed certification. The proctor shall identify the test as failed immediately upon assessing that the candidate failed to perform one of the critical skill items. An inspector candidate may at that time request training and technical assistance on the inspector protocol.

The scoring criteria is included as part of the Field Test and Score Form document. See **Attachment F**.

Number and Status of Previous PG Memos Issued on the Same Subject: None
Contact Office: Bureau of Community Action and Economic Opportunity
Telephone Number and E-mail address of Contact: Diane Holley, 517-335-6070; holleyd@michigan.gov

Distribution: CAAs and LPAs
Obsolete Date: N/A

cc: All BCAEO Staff

Working Together to Make Michigan Weatherization Work

TRAINING AND TECHNICAL ASSISTANCE RETENTION AGREEMENT
ATTACHMENT A

THIS TRAINING AND TECHNICAL ASSISTANCE RETENTION AGREEMENT made this ____ day of _____, 200_, is by and between AGENCY NAME (hereinafter "ABC"), and _____ (hereinafter "Contractor"), for training and technical assistance (hereinafter "T&TA") towards the cost of the Weatherization Inspector Certification Course (hereinafter "Training Course") under the Michigan Weatherization Assistance Program (hereinafter "M-WAP").

WITNESS:

WHEREAS, Section 3.0 of DOE's Weatherization Program Notice 09-1B requires that contractors receiving DOE T&TA funds sign a retention agreement that they will provide weatherization services for a specific amount of time that aligns with the funds provided;

WHEREAS, Contractor desires to receive T&TA funds assistance for the Course;

NOW THEREFORE, in consideration of the premises and agreements of "ABC" and Contractor as hereinafter provided, the parties hereby mutually agree as follows:

1. "ABC" will provide DOE T&TA funds to cover the cost of Contractor's participation in the Training Course, limited to the following:
 - a. Reasonable travel costs in accordance with DOE standards;
 - b. **[INSERT OTHER COSTS, IF APPLICABLE]**
2. Contractor shall satisfactorily complete the Training Course and any examinations required thereto;
3. Contractor shall remain actively employed or actively participate in M-WAP weatherization inspections for a period of no less **than twelve (12) months** following completion of the Training Course.
4. If Contractor does not fulfill his or her obligations under this Agreement, Contractor will reimburse "ABC" the total T&TA funds drawn within thirty (30) calendar days of notice from "ABC". Said reimbursement amount shall become immediately due and payable as a debt and obligation of Contractor to "ABC". Repayment will be made in the full amount due as a lump sum. **If payment is not received by "ABC" within thirty (30) days, "ABC" may assess reasonable costs of collection, including but not limited to interest, court costs, and attorney's fees.**
5. **Contractor has read and understands the terms of this Agreement.**

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed the date and year first indicated.

CONTRACTOR:

Signature
Printed Name:

Date

AGENCY NAME

Signature
Printed Name:
Title:

Date

PG 09-05 ATTACHMENT B

Michigan Weatherization Inspector Level I Training Criteria

Week I

7109 W Saginaw Training Center, Lansing, MI 48917
Classes begin at 8:00 a.m. and conclude at 4:30 p.m.

Day – 1(week 1):

1. Introduction (set-up computers)
2. FADD/MFAD, & IWC/IWCM (Compact Audit)
3. Technical Weatherization Policies (TWP) & Midwest Weatherization Best Practices Field Guide
4. Use of Adobe Search Function
5. Tools/Equipment
6. Inspector & Worker Safety
7. Equipment Safety (PPE)
8. Site Build Inspection (FADD/IWC)
9. Manufactured Home Inspection (MFAD/IWCM)
10. Measure Accurately
11. Heated Envelope/Pressure Planes
12. Introduction to Blower Door Testing

Day - 2 (week 1):

1. Heated Envelope/Pressure Planes
2. Zone Pressure Diagnostics (ZPD)
3. Health and Safety
 - a. Asbestos
 - b. Knob & Tube
 - c. Lead Safe Work Practices
 - d. Gas Testing
 - e. Mold & Moisture
 - f. Other Hazardous Conditions
4. Combustion Appliance Science
5. Worst Case Draft, CAZ testing
6. Unvented Space Heater Rule

PG 09-05 ATTACHMENT B

Day - 3 (week 1):

1. Major Bypass/Infiltration/Exfiltration
2. Duct Sealing/Duct Insulation
3. Sidewall Insulation
4. Attic Insulation/Attic Ventilation
5. Foundation Insulation/Ventilation
6. Optional, Incidental & Miscellaneous Measures
7. Baseload Measures
 - a. D & R Refrigerator Analysis
 - b. Water Heater Analysis Model (WHAM)
 - c. Incandescent Light Bulb Replacement w/ CFL

Day - 4 (week 1):

1. Week 1 (Level I) Review
2. **Week 1 (Level I) Final Exam**

Michigan Weatherization Inspector
Level I
Training Criteria
Week 2

Classes begin at 8:00 a.m. and conclude at 4:30 p.m.

Day -1 (week 2):

1. Weatherization Assistant 8
2. NEAT Parameter/Setup Overview
3. NEAT – House Review
4. MHEA Parameter/Setup Overview
5. MHEA – Mid-Michigan MH Review
6. Weatherization Assistant 8 Inputting Data
7. Audit Input/Output Reports

Day – 2 (week 2):

1. Tools/Equipment
2. Inspector & Worker Safety
3. Equipment Safety
4. Measure Accurately
5. Photo/Drawing Use
6. Writing Comprehensive Work Orders
7. Construction Management vs. Post Inspection

Day - 3 (week 2):

1. Zone Pressure Diagnostics – Secondary Zones
2. Interviewing Client/Customer

PG 09-05 ATTACHMENT B

- a. Client Plan of Action
- b. Lead Notice
- c. IAQ Information
- d. Energy Education
3. Post Inspection - Quality Control/Assurance
 - a. Incomplete work - writing a corrective action work order
 - b. Incorrect work – writing a finding
4. Recordkeeping
5. Week 2 (Level I) Review
6. Week 1 & 2 (Level I) Review

Day - 4 (week 2):

- 1. Week 1 & 2 (Level I) Final Exam**
2. Mold/IAQ (1:00 pm)

Michigan Weatherization Inspector Level II Training Criteria

7109 W Saginaw Training Center, Lansing, MI 48917
Classes begin at 8:00 a.m. and conclude at 4:30 p.m.

Day - 1

1. Create NEAT/MHEA File Set-Up in WA8. WA8 MANUAL
2. Create Cost Libraries

Day – 2

1. Cost Libraries (cont'd)
2. Create Work Orders

Day – 3

1. Completing WA8 Audit and Output Analysis
2. Create mdb File (Level II)
3. Transferring Files

Day - 4

1. CAZ Looking for system optimization opportunities via: sizing, controls, setback thermostats, operating strategies, and proper application. Testing flue gas with analyzer equipment – assumptions
2. Level II Review
3. **Level II Test**

INSPECTOR FIELD OBSERVATION TEST HOUSE CRITERIA

PG 09-05 ATTACHMENT C

If a local agency needs to locate a home to accommodate an inspector candidate performing the field test, the following is the field test house criteria:

The stick-build residential home (pre-1978 construction) should include the following:

- Natural or Propane Gas appliances
 - Furnace 80% or less - NO CLOSED COMBUSTION or pvc vent
 - DHW tank (atmospheric) – NO POWER VENT
- Accessible attic - prefer unfinished and finished attics (Both)
- A working refrigerator
- Basement and/or crawlspace (Both preferred)
- Attached garage OR enclosed front or rear porch (Must have one of these)

RELEASE OF TEST INFORMATION

I understand _____(Sponsoring Agency) is sponsoring me to attend a Michigan Department of Human Services, Bureau of Community Action and Economic Opportunity (DHS BCAEO) training.

I agree by signing below that the DHS BCAEO staff is hereby authorized to release information regarding my attendance and test scores to the agency listed above.

Signed: _____ Date: _____

DHS BCAEO Witness: _____ Date: _____

Sponsoring Agency Contact Person: _____

Contact Person's Email Address: _____

**Michigan Department of Human Services (DHS)
Bureau of Community Action & Economic Opportunity (BCAEO)
Weatherization Assistance Program (WAP) Inspector Certification
Process
PG 09-05 - ATTACHMENT E**

The Inspection candidate is tested on the criteria listed below. The tests are based upon the DOE recommended minimum standards for Field Audits with compliance to all State of Michigan and local code requirements. An inspector candidate that has successfully completed the Basic and Intermediate Inspector class tests (prior to May 2009) and Level I Inspector Training (May 2009 and after) can request an inspector certification field test. The candidate will be evaluated as a Level I or Level II inspector after successfully completing the inspection and submitting all required paperwork to the DHS BCAEO proctor.

Once certified at either level, the inspector can conduct independent pre- and post-inspections.

Limitation: If only certified as a Level I Inspector and a combustion appliance flue gas analysis is required, a Level II Inspector or Licensed Mechanical Contractor/Inspector must complete this portion of the inspection/audit process.

The Level I Inspector is an inspector evaluated on the following 25 areas. The first four tests are Health and Safety tests. These are listed in the order outlined by DOE and must be performed in this order during this process.

1. Gas Leak Test
2. Ambient Air Test (Carbon Monoxide)
3. Worst Case Draft Combustion Appliance Zone (CAZ) Test
4. Zone Pressure Diagnostic (ZPD) Test (Required when a garage is attached to the dwelling)

The following tests can be conducted in any sequence.

5. Indoor Air Quality (IAQ) Assessment
6. Blower Door Test
7. Identify Major Bypass's vs. Infiltration/Exfiltration (what method was used to determine)
8. Measuring the Dwelling
9. Finished and/or Unfinished Attic
10. Attic Ventilation
11. Foundation Measure
12. Refrigerator Assessment
13. CFL (compact fluorescent light bulb) Assessment for Replacement
14. Health and Safety Measures
 - a. Smoke Detector - identify quantity and area for placement
 - b. Dryer venting

**Michigan Department of Human Services (DHS)
Bureau of Community Action & Economic Opportunity (BCAEO)
Weatherization Assistance Program (WAP) Inspector Certification
Process
PG 09-05 - ATTACHMENT E**

- c. Other Health and Safety item(s)
- 15. Notices (IAQ, POTENTIAL HAZARD...)
- 16. Incidental Repairs
- 17. Optional Measures
- 18. Customer/Client Interaction
- 19. Completeness of Inspection Document
- 20. Photos and Drawings
- 21. Completeness of Work Order
- 22. Completeness of Client Notices
- 23. Correct LSW (lead safe weatherization) Inspection Practices
- 24. Appropriate Audit Document (FADD/IWC/WA8)
- 25. Timeliness of Audit Competition (DHS BCAEO receipt of all documents within 24 hours of inspection conclusion)

* * * * *
* *

The Level II Weatherization Inspector is evaluated on the following areas:

- 26. All Level I Inspector Competencies
- 27. NEAT/MHEA File Setup (Computer Lab Test)
- 28. NEAT/MHEA WA8 Audit.
- 29. Combustion Appliance Flue Gas Analysis
- 30. Timeliness of Audit Competition (DHS BCAEO receipt of all documents within 24 hours of inspection conclusion)

Timelines:

Upon arrival at the test site, each candidate will receive the "Michigan WAP Inspector Candidate Field Test Observation Process" form. The form will include the date and time of the candidate field test, the address, and the date/time that all required documentation must be submitted to the DHS BCAEO proctor.

The candidate will have three (3) hours on site to complete his/her inspection and twenty four (24) hours from the conclusion of the on-site inspection to submit all required inspection documentation.

Note: Requests for consideration of travel time to and from test site will be considered on a case by case situation. Please advise BCAEO staff of this request at the time of the observation process reservation.

**Michigan Department of Human Services (DHS)
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Weatherization Assistance Program (WAP) Inspector Certification
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PG 09-05 - ATTACHMENT E**

Candidates must email all required inspection documents to the DCH BCAEO proctor at: ferrism2@michigan.gov or Glasgowr@michigan.gov (Email).

Required Documentation:

The required documentation MUST include all of the following:

- Complete field audit document (Either IWC or FADD)
- Copy of all site produced notices
- Completed NEAT input of this inspection
- Completed NEAT output report of this inspection
- Complete work orders that identify all NEAT required measures.
- To be considered complete, a work order must include all
 - SIR justified measures;
 - Incidental measures;
 - Health & safety measures
 - Miscellaneous measures
 - Optional measures

Evaluation/Recommendation:

Satisfactory Inspection – Grant Certification Level I

Satisfactory Inspection – Grant Certification Level II

Additional Site Inspection Needed (equipment failed or test aborted)

Unsatisfactory Inspection – Failed (scored less than 70%)

An Inspector Candidate will pass the inspector field test with a score of 70% or greater AND satisfactory completion of the five following Critical Skill Items.

Critical Skill Items

1. Perform all required health and safety tests in the DOE prescribed order.
2. Perform satisfactory Blower Door Test: set-up and testing.
3. Perform satisfactory CAZ test: set-up and testing.
4. Conduct Lead Safe Weatherization practices during the inspection.
5. Prepares the work order and it is reflected correctly in the NEAT output report.

NOTE: The failure of satisfactorily completing any of the above five procedures will result in a failed test. The proctor shall identify the test as failed immediately upon assessing that the candidate failed to perform one of

**Michigan Department of Human Services (DHS)
Bureau of Community Action & Economic Opportunity (BCAEO)
Weatherization Assistance Program (WAP) Inspector Certification
Process
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the critical skill items. This will allow BCAEO staff to provide onsite training and technical assistance to the inspector candidate at that time.

Sponsoring Agency Notification

Sponsoring agencies will only be notified of the test results if the inspector candidate or the agency has forwarded a signed release by the candidate. The release form should include the name and email of the agency contact person as well as that of the inspector candidate to ensure both receive notification.

Michigan WAP Inspector Candidate Field Test Score Form									
PG 09-05 - ATTACHMENT F									
		Address							
Working Knowledge	Demonstrates Ability	Name	Date	Proctor					
		1		Gas Leak testing <i>comment</i>					
2		CO ² testing (ambient air) <i>comment</i>							
3		Worst Case Draft (CAZ) <i>comment</i>							
4		Attached garage ZPD <i>comment</i>							
5		IAQ Evaluation (552 form) <i>comment</i>							
6		LSW (sidewall test) <i>comment</i>							
7		Blower door testing/calculations <i>comment</i>							
8		Major bypass (Correctly identified) <i>comment</i>							
9		Infiltration (Correctly identified) <i>comment</i>							
10		Accurate Measurements <i>comment</i>							
11		Walls <i>comment</i>							
12		Windows & Doors <i>comment</i>							
13		Attic <i>comment</i>							
14		Foundation <i>comment</i>							
Baseloads									
15		Refrigerator assessment <i>comment</i>							
16		CFL and baseload <i>comment</i>							
Health & Safety									
17		Smoke detectors <i>comment</i>							
18		Dryer venting <i>comment</i>							
19		Notice of Hazards (Asbestos, IAQ, Unsafe Condition) <i>comment</i>							
File/Audit Maintenance									
20		Photo and Drawings <i>comment</i>							
21		Client Interaction <i>comment</i>							
22		Completeness of Inspection <i>comment</i>							
23		Completeness of NEAT input/output <i>comment</i>							
24		Completeness of Work Order <i>comment</i>							
	0	0	Total Score	100	Maximum Score	0%	Candidate's Score		
Satisfactory Evaluation = score of 70% or greater AND satisfactory completion of the following five critical skill items:									
Critical Skill Items									
1. Perform all required health and safety tests in the DOE prescribed order									
2. Perform satisfactory Blower Door Test: set-up and testing									
3. Perform satisfactory CAZ test: set-up and testing									
4. Conducts Lead Safe Weatherization practices during the inspection									
5. Prepares the work order and it is reflected correctly in the NEAT output report									
NOTE: The failure of satisfactorily completing any of the above five procedures will result in a failed test.									
Scoring Chart									
NA	Does not apply. Not eligible								
0	Fail, does not meet standards								
1	Needs improvement & Additional Site Inspection Required								
2	Basic understanding/skill & Needs additional field training & testing								
3	Good understanding/skill, Pass								
4	Excellent understanding/skill								
Needs Improvement - individual item scored 2 or 1									
Additional Site Inspection needed - equipment failed or test aborted									
Working Knowledge is only a Yes/No assessed when measure is not available on site.									



STATE OF MICHIGAN
**Department
of Human
Services**

MICHIGAN WEATHERIZATION
ASSISTANCE PROGRAM

Memorandum

**Bureau of Community Action and
Economic Development (BCAEO)**
235 S. Grand Ave., Suite 204
P.O. Box 30037
Lansing, MI 48909
www.michigan.gov/dhs

Program Guidance (PG): 09-06

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **March 12, 2010**

From: **Diane Holley, Weatherization Division Manager**

Subject: **EPA Lead Renovation, Repair and Painting Program (LRRPP) Rule and Lead Safe Work
Practices Training**

Response Due: None

EPA has issued a new Lead Rule that will be effective April 22, 2010. However many provisions of the new rule have generated questions and we anticipate further clarification to be forthcoming regarding the Lead Renovator requirements, Lead Firm requirements, and Lead Safe Work (LSW) Practices requirements. For your reference, this memo includes as an attachment the U.S. Department of Energy (DOE) Minimum Standards for LSW. Attachment 1 is included with DOE WPN 08-6 and is posted on WAPTAC at:

<http://www.waptac.org/si.asp?id=1234>

Please note that several EPA requirements become effective April 22, 2010. These include the following:

- A Certified Renovator will be required at the jobsite to assess and set up the containment site. **Note** that this requirement is for one renovator per jobsite and does not require that all workers and contractors become certified renovators.
- Specific clean up procedures are required.
- Specific verification inspection procedures are required.
- Cleaning verification using EPA-developed cards will be required.
- There are specific steps required of the Certified Renovator during the cleaning verification.

All LWOs can obtain EPA rule information at the following website:

<http://www.epa.gov/lead/pubs/renovation.htm>

EPA Lead Certified Renovator Training

LWOs should arrange for LRRPP training as soon as possible to ensure having required certified renovators available to jobsites. LRRPP training is an allowable DOE T/TA expense.

You may find LRRPP training providers at the EPA website above, or at the Michigan Department of Community Health website at:

http://www.michigan.gov/documents/mdch/RRP_Training_Schedule_290357_7.htm

You may find an EPA list of “Eligibility Requirements for Refresher Training” at the following website:

<http://www.epa.gov/lead/pubs/trainerinstructions.htm#refresher>

Several LWOs have accessed trainers through this list and many have had success in arranging for the training to be provided at the local agency. BCAEO is also willing to assist with providing space at our training facility upon request.

Lead Safe Work Practices Training

The State of Michigan Weatherization Assistance Program will continue to require Lead Safe Work Practices Training for all weatherization workers and contractors. The Bureau has recently reviewed comments on the draft TWP and in response to concern over the training needs associated with the required LSW, we are expanding the requirement that all workers obtain LSW training within 120 days of employment **to 180 days** with the continued provision that any staff/contractor working without this training must be accompanied by trained workers.

Number and Status of Previous PG Memos Issued on the Same Subject: None

Contact Office: Bureau of Community Action and Economic Opportunity

Telephone Number and E-mail address of Contact: Diane Holley- 517-335-6070

Distribution: Executive Directors and Local Weatherization Operators

Obsolete Date: N/A

cc: All BCAEO Staff

Working Together To Make Michigan Weatherization Work



Attachment 1

**U.S. Department of Energy
Minimum Standards for LSW**

Safe Work Practices must be implemented to minimize exposure to hazards for the customer and the workers, while allowing Weatherization to occur in a cost-effective manner and to not hinder production. The effort required will be based on the hazard, the work specifications, and customer health issues.

CHECK: Federal, state, and local regulations.

- OSHA has rules for worker safety.
- States and local communities may have rules for waste disposal.

To meet the LSW minimum standards, crews and contractors MUST follow the general principles of working clean and working wet. Best practices for working clean and working wet are available in the benchmark LSW procedures and curriculum and should be reviewed and consistently enforced on LSW jobs.

A. Requirements

Weatherization Worker Protection

LSW includes these procedures and safety precautions:

- Wear personal protective gear specifically suited for the particular LSW measure. Use the National Institute for Occupational Safety and Health (NIOSH) approved respirators (at least ½ face) with HEPA filters.
- Use disposable overalls (with hood or a disposable painter's cap), gloves (cloth, plastic, or rubber as appropriate), goggles, and disposable shoe/boot covers.
- Keep dust to a minimum and confine dust and paint chips to the work area.
- Clean up area during and after work.

For 2010, to comply with EPA's LRRPP Rule requirements, specific clean up procedures will be required as outlined in the April 22, 2008, rule.

- During Weatherization, wash your hands and face frequently, particularly when leaving the work area and especially before leaving the area for the purpose of eating, drinking, or smoking.
- Before leaving a confined work area, remove your protective clothing and protective shoe/boot covers to avoid exposing others.
- Before leaving a confined work area, and before returning tools and equipment to vehicles, clean all tools to avoid exposing others and creating a lead-hazard to the next Weatherization job.
- Get annual medical exams to check blood lead levels. Do non-lead-related work if your blood lead level gets too high.
- Inform your employer if you develop signs of lead poisoning.



Client Notification

For occupied homes, the Weatherization staff, crew, or contractor must have an adult tenant or homeowner sign an acknowledgement after receiving the pamphlet. The pamphlet can also be sent by certified mail with receipt to be placed in the customer file.

In multi-unit housing, the agency must:

- Provide written notice to each affected unit (notice must describe: general nature and locations of the planned renovation activities; the expected starting and ending dates; statement of how occupant can get pamphlet at no charge); or
- Post informational signs (signs must describe general nature and locations of the renovation and the anticipated completion date) and post the EPA pamphlet. (If pamphlet is not posted then agencies are required to provide information on how interested occupants can review a copy of the pamphlet or obtain a copy at no cost from the Weatherization Program).
- Delivery to owner/occupant. Owner's and/or occupant's signature with acknowledgment or certificate of mailing. The owner/occupant must acknowledge receipt of the EPA pamphlet prior to start of renovation that contains the address of unit undergoing renovation, name and signature of owner or occupant, and the date of signature. It must be in same language as "contract for renovation" for an owner-occupied (or the same language as the lease for occupant of non-owner occupied) target housing.

If the Weatherization Program cannot get a signed acknowledgment (either the occupant is not home or refuses to sign the form), then the self-certification section of the form must be signed to prove delivery.

The acknowledgement form must be filed and remain with the client file for three years from date of signature. In addition to providing a copy of the pamphlet to owners and occupants, designated local agency staff (e.g., intake specialist, auditor, crew chief) must discuss the hazards associated with lead-based paint and lead dust, and describe how they will conduct LSW in the home.

B. General LSW Work Practice Standards

- Crews and contractors must take steps to protect occupants from lead-based paint hazards while the work is in-progress using appropriate containment strategies.
- Occupants, especially young children or pregnant women, may not enter the work site. Occupants are allowed to return only after the work is done and the home has passed a visual inspection.

<p>For 2010, to comply with EPA's LRRPP Rule requirements, specific verification inspection procedures will be required as outlined in the April 22, 2008, rule.</p>

- Occupants' belongings must be protected from lead contamination. This can be done by removing them from the work area or covering them in protective bags and sealing it to prevent dust from getting on the items.
- The work site must be set up to prevent the spread of leaded dust and debris.
- Warning signs must be posted at entrances to the worksite when occupants are present; at the



main and secondary entrances to the building; and at exterior work sites. The signs must be readable from 20 feet from the edge of the worksite. Signs should be in the occupants' primary language, when practical.

- The work area must be contained. If containment can not be achieved with occupants in the unit (e.g., work will take several days and involves the kitchen, bathrooms, or bedrooms that can not be sealed off from use), occupants must move out of the unit or the work must be deferred until containment can be achieved.
- In 2010, per EPA rule, a Certified Renovator must supervise and inspect Weatherization work of any type and scale to ensure it is being done properly.
- Ensure containment does not interfere with occupant and worker egress in an emergency.

Prohibited Work Activities

The following are frequent questions related to prohibitions when working in pre-1978 homes:

- NEVER - use reusable cloth or fabric, such as a painter's drop cloth, as protective containment sheeting. Polyethylene and in some cases when working on the exterior garden fabric are the only acceptable protective containment sheeting and must never be reused.
- NEVER - use brooms and shop vacuums for cleanup. Wet cleaning and HEPA vacuums are the only acceptable methods for cleanup.
- NEVER – use a conventional shop vacuum with HEPA filters – only HEPA-designed vacuums are acceptable for LSW.
- NEVER - turn leaded paint into leaded dust by dry scraping or sanding (unless needed around electrical outlets) or grinding, abrasive blasting or planing.
- NEVER - use an open-flame torch or heat gun (above 1100°F) to remove paint or window glazing. Open flame/high heat methods to remove paint create fumes that are dangerous for workers to breathe. Small lead particles created by burning and heating also settle on surrounding surfaces and are very hard to clean up.

C. Containment

Containment is anything that stops any dust or debris from spreading beyond the work area to non-work areas. The level of containment must be determined by the auditor/inspector or supervisor before work is assigned to a crew or contractor.

For 2010, to comply with EPA's LRRPP Rule requirements, a Certified Renovator will be required at the jobsite to assess and set up the containment site.

- NEVER - allow residents and pets access to the work area while work is underway.
- NEVER - open windows and doors allowing lead dust to float into other parts of the building or outside.
- NEVER - allow furniture and other objects to remain in the Weatherization work area while Weatherization work is being performed unless they are covered and sealed in polyethylene sheeting or bags.



Every home and every specific Weatherization measure is unique, therefore the level of containment required will be based on the hazards present, the age of the home, the scope of work activities, and any customer health issues. Although Weatherization jobs require individual assessments, LSW work generally falls into two levels of containment and the related standards are outlined below.

Level 1 Containment

Level 1 containment is required in pre-1978 homes when *less than* 6 ft² of interior painted surface per room or 20 ft² of exterior painted surface will be disturbed.

Level 1 containment consists of methods that prevent dust generation and contains all debris generated during the work process. The containment establishes the work area which must be kept secure.

Measures that *may* fall within this guideline include:

- Installing or replacing a thermostat
- Drilling and patching test holes
- Replacing HEPA filters and cleaning HEPA vacuums
- Changing Furnace Filter
- Removing caulk or window putty (interior)
- Removing caulk or window putty (exterior)
- Removing weather-stripping

Level 2 Containment

Level 2 containment is required when Weatherization activities will disturb *more than* 6 ft² of interior surface per room or 20 ft² of exterior surfaces in homes built prior to 1978. Level 2 containment consists of methods that define a work area that will not allow any dust or debris from work area to spread. Level 2 containment requires the covering of all horizontal surfaces, constructing barrier walls, sealing doorways, covering HVAC registers with approved materials, and closing windows to prevent the spread of dust and debris.

Measures requiring level 2 containment *may* include:

- Drilling holes in interior walls
- Drilling holes in exterior walls, removing painted siding
- Cutting attic access into ceiling or knee walls
- Planing a door in place
- Replacing door jambs and thresholds
- Replacing windows or doors
- Furnace replacements

Additionally, Level 2 containment must **ALWAYS** be used where any of the following is conducted (even if the activities will disturb less than the hazard de minimis levels within the Level 1 category):

- Window replacement
- Demolition of painted surface areas



- Using any of the following:
 - Open-flame burning or torching;
 - Machines to remove paint through high-speed operation without HEPA exhaust control; or
 - Operating a heat gun at temperatures at or above 1100 degrees Fahrenheit.

D. Proper LSW Clean-Up and Debris Disposal

Following the containment standards in the previous section will minimize the level of effort required to properly clean up the job site. All dust, dirt, material scraps, containers, wrappers, and work related debris must be removed from the customer's home. A HEPA vacuum should be used to clean up the work areas. Further cleaning may be necessary based on the hazard.

At the conclusion of the job, once all workers have "cleaned" the work areas thoroughly, Weatherization workers must adhere to the following:

Safe and Secure Disposal

- Bag and gooseneck-seal all waste in 6-mil plastic bags
- Safely dispose of all waste in accordance with federal, state, and local regulations

Visual Inspection Verification

Checking the quality of worksite cleanliness is a two-phase process:

- Phase 1: Worker visual inspection during the cleaning process; look for any visible paint chips, dust, or debris as you clean, using proper techniques.
- Phase 2: Supervisor visual inspection after cleanup. There should be no evidence of settled dust following a cleanup effort. If dust is observed, the Weatherization crew must be required to repeat the cleaning.

If work is done outside the house, the grounds around the dwelling and all exterior horizontal surfaces should also be examined visually to make certain that all waste and debris have been removed and that paint chips were not left behind.

For 2010, to comply with EPA's LRRPP Rule, cleaning verification using EPA-developed cards will be required. EPA expects to have them widely available in late 2008/early 2009; however, using verification cards is not a requirement until 2010.

Specific steps required of the Certified Renovator during the cleaning verification is available in the EPA LRRPP Rule and will be implemented as a requirement by DOE in PY 2010.



STATE OF MICHIGAN
**Department
of Human
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MICHIGAN WEATHERIZATION
ASSISTANCE PROGRAM

Memorandum

**Bureau of Community Action and
Economic Development (BCAEO)**
235 S. Grand Ave., Suite 1314
P.O. Box 30037
Lansing, MI 48909
www.michigan.gov/dhs

Program Guidance (PG): 10-01

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **4/29/10**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Weatherization Assistance Program Technical Monitoring- Quality Assurance Control**

Response Due: Yes

The DHS BCAEO Weatherization Division staff has been contacting each agency to schedule the first of a series of technical weatherization monitor visits. Staff will conduct desk audits for most of the file review activities. Other elements of the technical monitor visits will include agency and jobsite monitoring activities. A list (Attachment 10-1 A) including the current technical staff agency assignments and email addresses is included for your reference.

Technical staff is monitoring DOE PY09 Base and DOE ARRA jobs. BCAEO WAP staff continues to be committed to providing training and technical assistance (T/TA) as part of the monitoring process. This new cycle of monitoring will include a gradual transition in the process. Staff will be reviewing current program year jobs for the majority of reviews. Staff will monitor jobs in every stage of the process to allow observation and T/TA throughout.

PY07 and PY08 DOE Monitoring

Technical monitoring is complete on PY07 and PY08 jobs. All final summary reports for these visits will be sent to agencies by May 14, 2010.

PY09 DOE Base and ARRA-funded Quality Assurance Activities

Per the DOE Weatherization Program Notice 10-05, DOE will provide Grantees access to the remaining 50% of obligated DOE ARRA funds based upon demonstrated progress. Demonstrated progress is defined as:

1. 30% of all units estimated to be weatherized in the approved Weatherization Plan are weatherized.
2. Each Grantee (state) has been fulfilling its monitoring and inspection protocol as part of its approved annual state plan.
3. Each Grantee (state) is monitoring local agencies at least once each year to determine compliance with administrative, fiscal, and State field policies and guidelines.
4. Local quality control efforts are in place.
5. At least 5% of the completed units are inspected by Grantee staff during the course of the year.
6. Grantees progress reports are acceptable, submitted in accordance with grant requirements, including being on time and accurate.
7. Monitoring reviews confirm acceptable performance.

Desk Monitoring

Staff will conduct file reviews at their worksite locations to eliminate agency disruption as much as possible. BCAEO WAP staff will provide a written request via email to the LWO agency listing all job file information to be forwarded via email to the BCAEO monitor. If documents required to complete the desk reviews cannot be forwarded electronically, it may necessitate an onsite agency visit.

Onsite monitor visits

Per DOE regulations, staff are required to do site visits to a minimum of 5% of the jobs completed. The visits will be scheduled at each agency on a quarterly basis. Please see the attached projected schedule of visits for the DOE ARRA production. The projected schedule of visits for each agency includes the total projected units, the number of jobsite visits to be conducted each quarter, and the number of job files to be submitted for review. As production increases, the number of scheduled site visits will be adjusted accordingly.

Staff will attempt to coordinate on-site visits with as little agency disruption as possible, while meeting DOE required monitor standards. These visits will include targeted monitoring. Jobs will be reviewed during various steps in the weatherization process including pre-inspections, lead safe weatherization activities, jobs in progress, and post-inspected jobs. Monitors will conduct desk reviews on 10% of the agency's quarterly production and site visits on a minimum of 5% of completed units. This percentage will be increased if issues are identified.

PY10 DOE base funded jobs review

Technical staff will begin quality assurance reviews on Program Year 10 DOE units in the second quarter of the program year. The process will be the same as described above, including desk reviews on a minimum of 10% of production and site visits on a minimum of 5% of production.

Reports

Quality Assurance Notice: Agencies will have the opportunity to participate in an entrance and exit conference at each visit. At the conclusion of each visit, the DHS BCAEO monitor will leave a detailed listing of all issues identified via the Quality Assurance Notice. This listing will not identify which issues are considered observations or findings. The listing will be an Excel-formatted document. The agency will have 45 days to make all necessary corrections and submit any necessary documentation to verify corrections have been completed. Monitors will conduct follow-up physical onsite reviews of a minimum of 1% of jobs where issues have been identified. If the resolution of an issue(s) can be documented with photos, or other electronic file documentation, this may waive the necessity of follow up onsite visits. The Quality Assurance Notice includes all issues identified and will be used to determine necessary training and technical assistance within the network.

Quality Assurance Summary: A formal technical monitor report will be issued within 90 days of the Quality Assurance Notice date, and will include all observed best practices, observations and findings. The Quality Assurance Summary will be issued by the WAP Technical Supervisor.

Quality Assurance Control Letter: The agency will have 45 days to respond to any outstanding issues identified in the Quality Assurance Summary. A final Quality Assurance Control Letter will be issued by the WAP Division Manager within 90 days of the Quality Assurance Summary.

The Quality Assurance Summary and Quality Assurance Control Letter will be sent via email in pdf format.

Agency Information Request

As part of the technical monitoring, the monitors must review contractor files. Please find attached a form that collects a listing of all WAP contractors and crews for each program year and funding source

identified (Attachment 10-1 B). Please email your completed form to your technical specialist with a copy to Marcia Ferris and Russ Glasgow. Please email the form by Friday, May 7, 2010.

Number and Status of Previous PG Memos Issued on the Same Subject: None
Contact Office: Bureau of Community Action and Economic Opportunity
Telephone Number and E-mail address of Contact: Diane Holley- 517-335-6070
Distribution: Executive Directors and Local Weatherization Operators
Obsolete Date: N/A

cc: All BCAEO Staff

Working Together To Make Michigan Weatherization Work



STATE OF MICHIGAN
**Department
of Human
Services**

MICHIGAN WEATHERIZATION
ASSISTANCE PROGRAM

Memorandum

**Bureau of Community Action and
Economic Development (BCAEO)**
235 S. Grand Ave., Suite 1314
P.O. Box 30037
Lansing, MI 48909
www.michigan.gov/dhs

Program Guidance (PG): 10-02

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **4/29/10**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Midwest Weatherization Best Practices Field Guide**

Response Due: None

Many agencies have requested further clarification regarding the adoption and use of the Midwest Weatherization Best Practices Field Guide. Specifically, questions have been raised about which manual governs program policy in situations where possible conflicts arise. The Midwest Weatherization Best Practices Field Guide is not a policy manual. It was adopted to provide a "how to" procedural manual for the Michigan weatherization network. This manual provides a collection of the best practices observed in an eight-state area. Since this manual does represent a collection of practices from states that do not have the same restrictions that Michigan does in some areas, some of the material is not applicable or appropriate. For example, some procedures may require licensing in Michigan and some materials may not be appropriate.

As the introduction to the Best Practices Field Guide indicates, the intent of this document is to capture the current "best available information" and transform it into recommended best practices for the Midwest weatherization programs. It is a voluntary standard that Local Weatherization Operators can use and adopt in their programs to provide better and more effective services to the program clientele.

The governing policy for the Michigan Weatherization Assistance Program is the U.S. Department of Energy regulations, the Technical Weatherization Program Manual (TWP) and the Community Services Policy Manual (CSPM). Reports that are prepared following monitoring visits will measure compliance against these regulations and/or manuals. Findings will not be written related to the Best Practices Field Guide material.

Number and Status of Previous PG Memos Issued on the Same Subject: None

Contact Office: Bureau of Community Action and Economic Opportunity

Telephone Number and E-mail address of Contact: Diane Holley- 517-335-6070

Distribution: Executive Directors and Local Weatherization Operators

Obsolete Date: N/A

cc: All BCAEO Staff

Working Together To Make Michigan Weatherization Work



STATE OF MICHIGAN
**Department
of Human
Services**

MICHIGAN WEATHERIZATION
ASSISTANCE PROGRAM

Memorandum

**Bureau of Community Action and
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Program Guidance (PG): 10-03

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **4/29/10**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Agency Certification of Weatherization Inspectors**

In an effort to provide LWOs with the resources necessary to achieve accelerated ARRA WAP production, BCAEO requested that DOE approve an alternate weatherization inspector certification process for Michigan. DOE has granted temporary approval of an Agency Certification process as a strategy to realize increased production during the ARRA period. Effective immediately, local weatherization operators (LWOs) will be given the option of certifying their own inspector candidates after the candidate has successfully completed or tested out of the BCAEO-delivered classroom training; Level I Inspector Training.

Test-out Option for Classroom Training

Inspector candidates with BPI or other training and/or experience continue to have the option to test out of the classroom portion of the Level I & Level II Inspector Training upon request. Program Guidance Memo 09-05 summarizes the training criteria candidates should be familiar with in advance of taking the written test. The test-out option will now be made available upon request rather than exclusively on the last day of scheduled classroom training. Candidates wishing to exercise the test-out option should contact Amy Dillon at 517-241-5116 or dillonA1@michigan.gov to arrange for delivery of the written test.

Agency Certification of Inspector Candidates/"Over the Shoulder" Test

Upon successful completion or test-out of the classroom training, the LWO may administer the over the shoulder field test to the candidate. In the event that the LWO does not currently have a Michigan WAP certified inspector available to proctor the over the shoulder test, the LWO may request that a Michigan WAP certified inspector from a peer LWO administer the test.

The attached Field Test and Score Form (see Attachment A) provides the minimum standards required for successful completion of the over the shoulder test required to achieve certification. The LWO Weatherization Program Manager, a Michigan WAP certified inspector and Executive Director must sign a certification form (see Attachment B) verifying that the candidate has met the standards, demonstrated sufficient skill, and successfully conducted an independent audit/over the shoulder test proctored by a Michigan WAP certified inspector. Upon LWO signature and submission of required documents to the Bureau, the candidate is "Agency Certified" and eligible

to perform independent WAP pre- and post-inspections for that particular LWO. The LWO must submit a scanned copy of the Field Test and Score Form (Attachment A) and certification form (Attachment B) to Amy Dillon at DillonA1@michigan.gov. The LWO must also maintain a copy of the completed checklist and certification form for each Agency Certified candidate.

Agency certified inspectors are eligible to perform independent pre- and post- inspections for the certifying LWO for a period of 12 months. If the LWO intends to use the agency certified inspector for more than 12 months, the LWO should request a state-proctored over the shoulder test for the inspector prior to the expiration of the agency certification. Upon successful completion of the state-proctored "over the shoulder" test, the candidate will become a Michigan WAP certified inspector and be universally eligible to perform inspections for any LWO in Michigan.

State-proctored "over the shoulder" tests will continue to be available on an ongoing basis to candidates wanting the statewide Michigan certification at any point, or LWOs requesting the additional level of certification. Please refer to Program Guidance Memo 09-05 for instructions on requesting a state-proctored over the shoulder field test.

Response Due: None

Number and Status of Previous PG Memos Issued on the Same Subject: PG-09-05, Active

Contact Office: Bureau of Community Action and Economic Opportunity

Telephone Number and E-mail address of Contact: Diane Holley- 517-335-6070

Distribution: Executive Directors and Local Weatherization Operators

Obsolete Date: N/A

cc: All BCAEO Staff

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AGENCY INSPECTOR CERTIFICATION Field Test and Score Form - PG 10-03 ATTACHMENT A

Note: See scoring key at bottom of form.

		Test House Address:					
Score	Inspector Candidate Name	Date	Proctor*				
*Proctor MUST BE a Michigan WAP Certified Inspector							
1	Gas Leak testing <i>comment</i>						
2	CO ² testing (ambient air) <i>comment</i>						
3	Worst Case Draft (CAZ) <i>comment</i>						
4	Attached garage ZPD <i>comment</i>						
5	IAQ Evaluation (552 form) <i>comment</i>						
6	LSW (sidewall test) <i>comment</i>						
7	Blower door testing/calculations <i>comment</i>						
8	Major bypass (Correctly identified) <i>comment</i>						
9	Infiltration (Correctly identified) <i>comment</i>						
10	Accurate Measurements <i>comment</i>						
11	Walls <i>comment</i>						
12	Windows & Doors <i>comment</i>						
13	Attic <i>comment</i>						
14	Foundation						
Baseloads							
15	Refrigerator assessment <i>comment</i>						
16	CFL and baseload <i>comment</i>						
Health & Safety							
17	Smoke detectors <i>comment</i>						
18	Dryer venting <i>comment</i>						
19	CO ² Monitor <i>comment</i>						
20	Notice of Hazards (Asbestos, IAQ, Unsafe Condition) <i>comment</i>						
21	Photo and Drawings <i>comment</i>						
22	Client Interaction <i>comment</i>						
23	Completeness of Inspection <i>comment</i>						
24	Completeness of NEAT input/output <i>comment</i>						
25	Completeness of Work Order <i>comment</i>						
	0	Total Score	100	Maximum Score	0%	Candidate's Score	

Satisfactory Evaluation = score of 70% or greater							
NA	Does not apply. Not eligible						
0	Fail, does not meet standards						
1	Needs improvement & Additional Site Inspection Required						
2	Basic understanding/skill & Needs additional field training & testing						
3	Good understanding/skill, Pass						
4	Excellent understanding/skill						

* Needs Improvement (individual item scored 2 or 1)
 ** Additional Site Inspection needed (equipment failed or test aborted)
 Working Knowledge is only a Yes/No assessed when measure is not available on site.

The following criteria will constitute a failed certification – (either set-up or testing)
 Inspection Candidate –
 - Is unable to perform satisfactory Blower Door Test
 - Is unable to perform satisfactory CAZ test
 - Is not following LSW practices during the inspection.

AGENCY INSPECTOR CERTIFICATION FORM- PG 10-03 ATTACHMENT B

Agency Name:	
Inspector Candidate Name:	
Michigan WAP Certified Inspector	
Performing over the shoulder assessment:	
Date of assessment:	
<p>Agency Certification: The undersigned parties certify by signing this form that the inspector candidate listed above did successfully conduct an independent audit/over the shoulder test proctored by the Michigan WAP certified inspector indicated above on the date recorded. The signing of this form documents agency inspector certification for this candidate and allows this person to conduct pre- and post- inspections at the agency listed above. This certification is valid for 12 months from the date signed. This certification is not complete until all required documents are submitted to DHS-BCAEO as instructed below.</p>	
NOTE: All three signatures are required to satisfactorily document agency inspector certification.	
Michigan WAP Certified Inspector:	Signature
Agency WAP Manager:	Date
Agency Executive Director:	

NOTE: A copy of this completed and signed form must be scanned and emailed to Amy Dillon at: DillonA1@michigan.gov upon completion.



STATE OF MICHIGAN
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MICHIGAN WEATHERIZATION
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Memorandum

**Bureau of Community Action and
Economic Development (BCAEO)**
235 S. Grand Ave., Suite 1314
P.O. Box 30037
Lansing, MI 48909
www.michigan.gov/dhs

Program Guidance (PG): 10-04

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **June 10, 2010**

From: **Diane Holley, Weatherization Division Manager**

Subject: **National Weatherization Assistance Program Evaluation**

Response Due: None

The data collection stage of the National Weatherization Assistance Program Evaluation is underway. Michigan will be participating in the overall evaluation and several agencies in Michigan have been selected by DOE to participate in the more in-depth portion of the study. The evaluation is being conducted by Oak Ridge National Laboratory for the U.S. Department of Energy (DOE). The evaluation team is headed by APPRISE Incorporated, with the Energy Center of Wisconsin serving as the data collection coordinator for the evaluation team. The Energy Center will work to ensure streamlined communications with your agency and to minimize the burden of the evaluation on you and your staff. The Energy Center will contact your agency soon with data requests. Your cooperation in supplying complete information in a timely manner is appreciated by this office and the evaluation team. This evaluation will provide useful information for the weatherization community, and your agency's data is critical to the overall success of this important project. More information about data collection can be found at: www.ecw.org/weatherization.

A list of the Michigan agencies selected for more in-depth study is as follows:

Alger-Marquette Community Action Board
Allegan County Resource Development Committee Inc.
Area Community Services Employment and Training Council Community Action Agency
Capital Area Community Services Inc.
Chippewa-Luce-Mackinac Community Action and Human Resources Authority, Inc.
City of Detroit, Department of Human Services
Downriver Community Conference
Economic Opportunity Committee of St. Clair County
EightCAP, Inc.
FiveCAP, Inc.
Genesee County Community Action Resource Department
Human Development Commission
Kalamazoo County Community Action Bureau
Macomb County Community Services Agency
Menominee-Delta-Schoolcraft Community Action Agency and Human Resources Authority

Mid Michigan Community Action Agency, Inc.
 Monroe County Opportunity Program
 Northeast Michigan Community Service Agency
 Northwest Michigan Community Action Agency
 Oakland Livingston Human Services Agency
 Saginaw County Community Action Committee, Inc.
 Southwest Michigan Community Action Agency
 Washtenaw County Employment, Training and Community Services
 Wayne County
 Wayne Metropolitan Community Action Agency

Anticipated Next Steps – Data Requests

Below is a list of data requests the evaluation team anticipates making over the course of the evaluation. They are listed in the order they will be requested. The list includes data requests for both the state agency and the local weatherization agencies. Please note that some data requests apply to all LWOs while others only apply to the smaller group of sampled LWOs (see list above) selected for more in-depth study.

Respondents	Data Forms and Surveys
All state offices	<ul style="list-style-type: none"> • Agencies Information Form (DF1) • Program Information Survey (S1)
All LWOs	<ul style="list-style-type: none"> • Overview Information Form (DF10) • Program Information Survey (S2)
Sampled LWOs	<ul style="list-style-type: none"> • Electric and Natural Gas Bills: Information from Agencies Form (DF4) • Overview Information Form (DF10) • Program Information Survey (S2) • Detailed Program Information Survey (S3) • Housing Unit Information Form (DF2)/Building Information Form (DF3) • Metered Fuels and Air Conditioner Studies: Information From Agencies Form (DF6)*
Utilities	<ul style="list-style-type: none"> • Electric and Natural Gas Bills: Information from Utilities Form (DF5)

*The completion of the DF6 form requires a field study in which housing units will be recruited for on-site metering research. Depending on other variables and the evaluation in general, this study may not be conducted until next year sometime.

All questionnaires will be made available online and agencies will be encouraged to submit information using the online format. Additional options will be made available to make it as easy as possible for the submission of requested data.

Number and Status of Previous PG Memos Issued on the Same Subject: None
Contact Office: Bureau of Community Action and Economic Opportunity
Telephone Number and E-mail address of Contact: Diane Holley- 517-335-6070
Distribution: Executive Directors and Local Weatherization Operators
Obsolete Date: N/A

cc: All BCAEO Staff

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www.michigan.gov/dhs

Program Guidance (PG): 11-01

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **1/28/11**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Health and Safety – Lead Safe Weatherization Measures Costs**

The Michigan WAP network agencies have been instructed previously to include the Lead Safe Weatherization costs in the IWC as part of the related measure being installed. These costs have not been added to Health & Safety costs to date. Clarification was requested regarding this matter. Per correspondence from the DOE project officer, the following practice will be appropriate for all LSW costs to date. LSW costs should be charged as Health & Safety, but they will not be included when determining the average H&S maximum. The LSW costs will be considered waived from the \$650 per unit allowance.

Per the DOE WPN 11-6, staff will be working on addressing LSW costs for PY11. We are considering the following change to this process with an effective date of 4/1/11. LSW health and safety costs will be included as program operations costs and cost justified through the NEAT audit with a required cumulative unit SIR of 1.0.

Draft policy regarding this change will be shared with the network for comment in the next several weeks.

Response Due: None

Number and Status of Previous PG Memos Issued on the Same Subject: Contact
Office: Bureau of Community Action and Economic Opportunity
Telephone Number and E-mail address of Contact: Diane Holley- 517-335-6070
Distribution: Executive Directors and Local Weatherization Operators
Obsolete Date: N/A

cc: All BCAEO Staff

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Lansing, MI 48909
www.michigan.gov/dhs

Program Guidance (PG): 11-02

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **3/14/11**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Weatherization Assistant 8.6.0.4 – Statewide Application Start Date**

Per the PY 2011 DOE WAP State Plan, the State of Michigan Weatherization Assistance Program (WAP) will transition into conducting NEAT/MHEA audits on all jobs that are single family units and multi-family units as appropriate. Priorities will no longer be an allowed option in determining the installation of weatherization measures. The Michigan Weatherization Assistance Program will require the use of the National Energy Audit Tool (NEAT/MHEA) 8.6.0.4 version **effective May 1, 2011**. Agencies should start the transition to the newer version in March, 2011 to ensure compliance with the May 1 start date.

This transition is not related to the DBA FACSPRO roll out so the date the agency goes live with the web based system does not have any impact on the required use of the NEAT/MHEA on all jobs.

See Program Guidance Memo 11-03 for additional information on the NEAT/MHEA WA 8.6.0.4 version.

Number and Status of Previous PG Memos Issued on the Same Subject: PGM 09-01

Contact Office: Bureau of Community Action and Economic Opportunity

Telephone Number and E-mail address of Contact: Diane Holley - 517-335-6070

Holleyd@michigan.gov

Distribution: Executive Directors and Local Weatherization Operators

Obsolete Date: N/A

cc: All BCAEO Staff

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Program Guidance (PG): 11-03

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **3/14/11**

From: **Diane Holley, Weatherization Division Manager**

Subject: **Weatherization Assistant 8.6.0.4 – Statewide Application Start Date**

The Michigan Weatherization Assistance Program will require the use of the National Energy Audit Tool (NEAT/MHEA) 8.6.0.4 version **effective May 1, 2011**. This audit should be used for all single family units and for multi-family units as appropriate. Agencies should start the transition to the newer version in March, 2011 to ensure compliance with the May 1 start date.

Set up of WA 8.6.0.4 is the same as for WA 8.4 currently in use. WA 8.6.0.4 training will be offered on March 28, 2011 at the Lansing training center similar to the training provided in September 2009 for WA 8.4. This is not the WA 8 class which is taught in the Inspector curriculum. This class will be geared to program managers responsible for maintaining WA 8.6.0.4 with the appropriate information including pricing, fuel cost, etc. Instructions regarding registration for this training will be sent in a separate training notice. Two classes will be held from 8:30 a.m. – noon and 1:00 – 4:30 p.m. Attendees should bring a USB memory stick.

Technical staff will be contacting agencies in the next couple of weeks to set up on-site assistance visits to ensure that agencies have accurate set up and supply libraries. To enable each agency set up, please use the attached WA 8 Measures and Price spreadsheet for populating the libraries of WA8.6.0.4. Please complete and return these spreadsheets by Monday, April 4, 2011, to Marcia Ferris (Ferrism2@michigan.gov) and Russ Glasgow (Glasgowr@michigan.gov) via email.

Number and Status of Previous PG Memos Issued on the Same Subject: PGM 09-01; PGM 11-02

Contact Office: Bureau of Community Action and Economic Opportunity

Telephone Number and E-mail address of Contact: Diane Holley - 517-335-6070

Holleyd@michigan.gov

Distribution: Executive Directors and Local Weatherization Operators

Obsolete Date: N/A

cc: All BCAEO Staff

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Program Guidance (PG): 11-04

To: **Executive Directors and Local Weatherization
Operators
Community Action Agencies
Limited Purpose Agencies**

Date: **3/14/11**

From: Diane Holley, Weatherization Division Manager

Subject: **Updated IWC**

Included with this program guidance memo are the revised IWC, IWCM and IWC Multi-Family forms to be used effective immediately. Each revised IWC includes changes necessary to accommodate the FACSPRO weatherization module. Please contact your technical specialist with any questions regarding this matter.

Response Due: None

Number and Status of Previous PG Memos Issued on the Same Subject: N/A
Contact Office: Bureau of Community Action and Economic Opportunity
Telephone Number and E-mail address of Contact: Diane Holley- 517-335-6070
Distribution: Executive Directors and Local Weatherization Operators
Obsolete Date: N/A

cc: All BCAEO Staff

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