

S1: ALL STATES PROGRAM INFORMATION SURVEY

This data is being collected to conduct a process evaluation of the Weatherization Assistance Program at the state level. The data you supply will be used to characterize program activities during Program Year 2008.

Public reporting burden for this collection of information is estimated to average sixteen hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Office of the Chief Information Officer, Records Management Division, IM-11, Paperwork Reduction Project (1910-XXXX), U.S. Department of Energy, 1000 Independence Ave SW, Washington, DC, 20585-1290; and to the Office of Management and Budget (OMB), OIRA, Paperwork Reduction Project (1910-XXXX), Washington, DC 20503.

All of the information obtained from this survey will be protected and will remain confidential. The data will be analyzed in such a way that the information provided cannot be associated back to your state, your agencies, or the housing units and clients that your state served. Again, please note that the questions refer to PY 2008 unless otherwise noted.

PROGRAM CHARACTERIZATION

1. Please identify your state: _____

2. How many layers of government (i.e., positions on an organization chart) sat between the governor's office in your state and your weatherization program in PY 2008? _____

3. During Program Year 2008, was the director of your State's Weatherization Program (Check best answer):
____ a civil servant
____ political appointee
____ elected official

4. During Program Year 2008, did the director of your State's Weatherization Program *report to a* (Check best answer):

- civil servant,
- political appointee
- elected official

5. For how many years had the current director of your State's Weatherization Program served in that capacity prior to PY 2008? _____

6. How many different people (including the PY 2008 director) led your State's Weatherization Program over the 10 years prior to PY 2008? _____

7. Did your State's Weatherization Program set annual performance goals of PY 2008?

- Yes
- No (go to Question 8)

7a. What agency, office, or department was responsible for reviewing the annual performance goals and achievement of goals of your State's Weatherization Program? _____

8. Please list other important housing and/or energy-related programs for low-income residents that were administered by the same office that is in charge of your state's Weatherization Assistance Program.

9. What weatherization program data did your state require its weatherization agencies to provide in PY2008? (Check all that apply)

- Number of homes weatherized
- Number of homes weatherized for high priority categories
- DOE weatherization funds expended
- Non-DOE weatherization funds expended
- Descriptive statistics on demographics of households weatherized
- Descriptive statistics on weatherization measures installed in households weatherized
- Descriptive statistics on energy use/savings of households weatherized
- Copy of audits performed on the households weatherized
- Results of certain diagnostic tests
- Other _____

10. For each of the data categories listed in Question 9, indicate the format in which the agencies were supposed to provide the data in PY 2008 by checking the appropriate box in the following table:

Data Category	Data Format				
	Paper hardcopy	Excel files or other computerized spreadsheet files	Microsoft Access or other computerized database files	Microsoft Word or other computerized word processing files	Not Required
Number homes weatherized					
Number home weatherized high priority categories					
DOE weatherization funds expended					
Non-DOE weatherization funds expended					
Descriptive statistics: demographics weatherized homes					
Descriptive statistics: weatherization measures installed					
Descriptive statistics: energy use and savings in weatherized homes					
Copies of audits performed on weatherized homes					
Results of certain diagnostic tests					
Other					

11. How frequently were the agencies supposed to provide the data in PY 2008? Please check the appropriate boxes. Please leave blank for data categories not reported.

Data Category	Reporting Frequency				
	Weekly	Monthly	Quarterly	Annually	Other
Number homes weatherized					
Number home weatherized high priority categories					
DOE weatherization funds expended					
Non-DOE weatherization funds expended					
Descriptive statistics: demographics weatherized homes					
Descriptive statistics: weatherization measures installed					
Descriptive statistics: energy use and savings in weatherized homes					
Copies of audits performed on weatherized homes					
Results of certain diagnostic tests					
Other					

12. Overall, how would you rate the quality of the data received from the agencies in PY 2008? Please check the appropriate boxes. Please leave blank for data categories that are not required to be reported.

Data Category	Data Quality				
	Very High	High	Medium	Low	Very Low
Number homes weatherized					
Number home weatherized high priority categories					
DOE weatherization funds expended					
Non-DOE weatherization funds expended					
Descriptive statistics: demographics weatherized homes					
Descriptive statistics: weatherization measures installed					
Descriptive statistics: energy use and savings in weatherized homes					
Copies of audits performed on weatherized homes					
Results of certain diagnostic tests					
Other					

13. Did your state analyze data provided by the weatherization agencies in PY 2008 to: (Check all that apply)

- Generate descriptive statistics
- Look for trends
- Support state-level strategic planning about its weatherization program
- Analyze individual agency performance
- Other _____

13a. If your state did not analyze data, why did your state not analyze data from the weatherization agencies in PY 2008? (Check all that apply)

- Not a priority
- Not worth the effort
- Insufficient staff resources
- Insufficient staff experience

14. What data did your state **plan** to provide to DOE about its weatherization program in PY 2008? (Check all that apply)

- Number of homes weatherized
- Number of homes weatherized for high priority categories
- DOE weatherization funds expended
- Descriptive statistics on demographics of households weatherized
- Descriptive statistics on weatherization measures installed in households weatherized
- Descriptive statistics on energy use/savings of households weatherized
- Copy of audits performed on the households weatherized
- Other _____

15. What data did your state **actually** provide to DOE about its weatherization program during PY 2008? (Check all that apply)

- Number of homes weatherized
- Number of homes weatherized for high priority categories
- DOE weatherization funds expended
- Descriptive statistics on demographics of households weatherized
- Descriptive statistics on weatherization measures installed in households weatherized
- Descriptive statistics on energy use/savings of households weatherized
- Copy of audits performed on the households weatherized
- Other _____

16. For each of the non-DOE sources of weatherization funds which your state administered in Program Year 2008, did you require local agencies receiving those funds to follow DOE rules when spending the money? If you did *not* require DOE rules to be followed for non-DOE jobs, what were the major differences in the rules governing those expenditures in comparison to DOE rules? If you did not administer funding from a particular source in Program Year 2008 for weatherization, please enter N/A. .

Source of non-DOE PY 2008 Weatherization Funding Administered by State	(A) Did you require local agencies to follow DOE rules when spending funds from this source? (Yes/No/NA)	(B) If the answer in Column (A) was no, what were the major differences in the rules governing the expenditure of funds from this source in comparison to the rules governing the expenditure of DOE funds?
LIHEAP		
Petroleum Violation Escrow (PVE)		
Other Federal Programs		
State Public Benefit Funds		
Other State Programs		
Utilities		
Program Income		
In-Kind		
Non-Profit Organizations		
Other		

17a. Please indicate the amount of weatherization funding from each source that your state administered in Program Year 2007 that was spent on the different functions or applications shown below. The amount that you list in the right-most cell at the very bottom of the table should equal the total amount of weatherization funding from all sources that your state administered in Program Year 2007.

Source of PY 2007 Weatherization Funding Administered by State	Training and Technical Assistance (T&TA)		Program Management		Other (funds for weatherization, health and safety, and other measures passed on to local agencies)	Total
	Funds retained and spent by state	Funds passed on to local agencies	Funds retained and spent by state	Funds passed on to local agencies		
DOE						
LIHEAP						
Petroleum Violation Escrow (PVE)						
Other Federal Programs						
State Public Benefit Funds						
Other State Programs						
Utilities						
Program Income						
In-Kind						
Non-Profit Organizations						
Other						
Total						

17b. Of the Program Year 2007 funds retained by your State's Weatherization Program for Program Management, how much was used for each function listed below?

Type of Management Function	Total
Administration*	
Agency monitoring	
Other (specify)	
TOTAL	

* Includes planning, finance and accounting, clerical support, outreach, and evaluation.

18a. Please indicate the amount of weatherization funding from each source that your state administered in Program Year 2008 that was spent on the different functions or applications shown below. The amount that you list in the right-most cell at the very bottom of the table should equal the total amount of weatherization funding from all sources that your state administered in Program Year 2008.

Source of PY 2008 Weatherization Funding Administered by State	Training and Technical Assistance (T&TA)		Program Management		Other (funds for weatherization, health and safety, and other measures passed on to local agencies)	Total
	Funds retained and spent by state	Funds passed on to local agencies	Funds retained and spent by state	Funds passed on to local agencies		
DOE						
LIHEAP						
Petroleum Violation Escrow (PVE)						
Other Federal Programs						
State Public Benefit Funds						
Other State Programs						
Utilities						
Program Income						
In-Kind						
Non-Profit Organizations						
Other						
Total						

18b. Of the Program Year 2008 funds retained by your State's Weatherization Program for Program Management, how much was used for each function listed below?

Type of Management Function	Total
Administration*	
Agency monitoring	
Other (specify)	
TOTAL	

* Includes planning, finance and accounting, clerical support, outreach, and evaluation.

19. How important were leveraged funds (i.e., funds that support the weatherization program that are not provided by DOE) for your State's Weatherization Program in PY 2008? (Check best answer)

- Very important
- Important
- Not very important
- Not important at all

20. Did your state set aside funding to advocate for leveraged resources in PY 2008?

- Yes (Go to Question 21)
- No (Go to Question 22)

21. What organizations advocated for leveraged resources in PY 2008? (Check all that apply)

- Your state office
- Your state's agencies
- Non-profit organizations funded by your state
- Other

22. How successful would you rate your state's efforts to acquire leveraged funds in PY 2008? (Check best answer)

- Very successful
- Successful
- Not very successful
- Not successful at all
- State does not seek leveraged funds

23. What factors limited the success of your state's efforts to acquire leveraged funding in PY 2008? _____

24. Have you modified your state's weatherization program practices or regulations in the three years prior to PY 2008 to facilitate spending and reporting on leveraged resources?

- Yes
- No

25. Please indicate the number of staff that supported your State's Weatherization Program and their work effort in Program Year 2008. In considering the number of staff, please include everyone who worked full- or part-time or who worked with the weatherization program as well as other state programs. Also include any non-agency staff supporting the state program who work under contract to the state.

Type of Administrative Function	Number of Staff (# persons)	Staff Work Effort (FTE)
Management/administration		
Agency monitoring		

Training and Technical Assistance		
Other (specify)		
TOTAL		

26. For the in-house staff working on your state’s weatherization program in each of the following functional areas in Program Year 2008, please indicate their collective level of experience with the weatherization program:

	Very High	High	Medium	Low	Very Low
Management/administration					
Field monitoring/auditing					
Training and Technical Assistance					
Other (specify)					

27. For the in-house staff working on your state’s weatherization program in each of the following functional areas in Program Year 2008, please indicate the amount of turnover in staff over a **three year period that included PY 2008**: Turnover is defined as the number of new staff in a functional area in the past three years divided by the total number of staff working in that functional area. If a particular position has had more than one new person during the past three years (e.g., Person 1 leaves, Person 2 is hired to take Person 1’s position, then Person 2 leaves and a third person is hired), just count that as one new staff person. (Please check appropriate boxes)

	No Turnover	1 to 10%	11 to 25%	26 to 50%	51 to 75%	76 to 100%
Management/administration						
Field monitoring/Auditing						
Training and Technical Assistance						
Other (specify)						

28. The Federal Regulations governing the Weatherization Assistance Program define children as “dependents not exceeding 19 years or a lesser age set forth in the State plan.” What age did you state use in your state’s definition of children in PY 2008? _____

29. Did your state use a high energy burden category to prioritize the provision of weatherization services in PY 2008?

- _____ Yes
 _____ No (go to Question 30)

29a. How was ‘high energy burden’ defined? _____

30. Did your state use a high energy expenditure category to prioritize the provision of weatherization services in PY 2008?

Yes

No (go to Question 31)

30a. How was 'high energy expenditure' defined? _____

31. What were the income guidelines for households to be eligible for your state's weatherization program in PY 2008? (Check all that apply)

- 100% of Federal Poverty Guidelines
- 125% of Federal Poverty Guidelines
- 150% of Federal Poverty Guidelines
- 185% of Federal Poverty Guidelines
- More than 185% of Federal Poverty Guidelines
- 60% of state median income
- Other: _____

PROGRAM OPERATIONS AND IMPLEMENTATION

1. Using the following scale, how adequate was the Program Year 2008 funding received by your state from ALL funding sources for weatherizing the stock of eligible low-income dwelling units in your state in a timely fashion? (Check all that apply)

- Very Adequate
- Adequate
- Inadequate
- Very Inadequate

2. What was the quality of the management support that your state received from DOE and its contractors in Program Year 2008? (Check all that apply)

- very high quality
- high quality
- moderate quality
- low quality
- very low quality
- not applicable

2a. If appropriate, why did you rate the quality very low or low? _____

3. What was the quality of the training that your state received from DOE and its contractors in Program Year 2008? (Check all that apply)

- very high quality
- high quality
- moderate quality
- low quality
- very low quality
- not applicable

3a. If appropriate, why did you rate the quality very low or low? _____

4. What was the quality of the support and assistance on client education that your state received from DOE and its contractors in Program Year 2008? (Check all that apply)

- very high quality
- high quality
- moderate quality
- low quality
- very low quality
- not applicable

4a. If appropriate, why did you rate the quality very low or low? _____

5. What was the quality of the support and assistance on leveraging the Weatherization Assistance Program funding provided by DOE with other funding sources in Program Year 2008? (Check all that apply)

- very high quality
- high quality
- moderate quality
- low quality
- very low quality
- not applicable

5a. If appropriate, why did you rate the quality very low or low? _____

6. What was the quality of the *technical* support (e.g., measure selection and installation) that your state received from DOE and its contractors in Program Year 2008? (Check all that apply)

- very high quality
- high quality
- moderate quality
- low quality
- very low quality
- not applicable

6a. If appropriate, why did you rate the quality very low or low? _____

7. How flexible did you find the DOE program rules that governed the weatherization program in Program Year 2008? In other words, did the program rules allow your state to tailor your program to your needs (very flexible) or proscribe your program to only one way of operation (very inflexible)? (Check all that apply)

- Very Flexible
- Flexible
- Inflexible
- Very Inflexible

7a. Using PY 2008 as the reference point, how should the program rules change? (Check all that apply)

- Become much more flexible
- Become more flexible
- Stay about the same
- Become more inflexible
- Become much more inflexible

7b. In what areas should the program rules become more flexible? _____

7c. In what areas should the program rules become less flexible? _____

8. Please describe any important political issues faced by your state's weatherization program in Program Year 2008.

9. Using PY 2008 as a reference point, how important was improving administrative support and assistance from DOE and its contractors in improving your state's ability to deliver low-income weatherization services? (Check all that apply)

- Very Important
- Important
- Unimportant
- Very Unimportant
- Not applicable

10. Using PY 2008 as a reference point, how important was improving training from DOE and its contractors in improving your state's ability to deliver low-income weatherization services? (Check all that apply)

- Very Important
- Important
- Unimportant
- Very Unimportant
- Not applicable

11. Using PY 2008 as a reference point, how important was improving assistance on client education from DOE and its contractors in improving your state's ability to deliver low-income weatherization services? (Check all that apply)

- Very Important
- Important
- Unimportant
- Very Unimportant
- Not applicable

12. Using PY 2008 as a reference point, how important was improving assistance from DOE and its contractors on leveraging the Weatherization Assistance Program provided by DOE with other funding sources?

- Very Important(Check all that apply)
- Important
- Unimportant
- Very Unimportant
- Not applicable

13. Using PY 2008 as a reference point, how important was improving *technical* support from DOE and its contractors in improving your state's ability to deliver low-income weatherization services? (Check all that apply)

- Very Important
- Important
- Unimportant
- Very Unimportant
- Not applicable

14. Using PY 2008 as a reference point, how important was increased weatherization funding in improving your state's ability to deliver low-income weatherization services? (Check all that apply)

- Very Important
- Important
- Unimportant
- Very Unimportant
- Not applicable

15. Using PY 2008 as a reference point, how important was improving data and information systems for managing the delivery of weatherization services? (Check all that apply)

- Very Important
- Important
- Unimportant
- Very Unimportant
- Not applicable

TRAINING

1. For those staff working in your state's weatherization office who need to have knowledge about the following list of weatherization topics, how well trained were they in each area in PY 2008? Please use the following scale: 1– not at all well trained; 2 – not well trained; 3 – moderately well trained; 4 –well trained; 5 – very well trained; 6 – not applicable *Circle best answer.*

(1) Diagnostic procedures	1	2	3	4	5	6
(2) Insulation						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(3) Space heating, ventilation, air conditioning						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(4) Infiltration measures						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(5) Doors and windows						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(6) Hot water heating						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(7) Baseloads (e.g., lighting, refrigerators)						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6

1a. For those staff working in your state’s weatherization office who need to have knowledge about the following list of administrative-related topics, how well trained were they in each area? Please use the following scale: 1– not at all well trained; 2 – not well trained; 3 – moderately well trained; 4 –well trained; 5 – very well trained; 6 – not applicable *Circle best answer.*

(1) Management	1	2	3	4	5	6
(2) Client education	1	2	3	4	5	6
(3) Auditing/estimating						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(4) Monitoring/quality control	1	2	3	4	5	6
(5) Financial topics	1	2	3	4	5	6
(6) Outreach and communications	1	2	3	4	5	6
(7) Other (please specify)	1	2	3	4	5	6

1b. For those staff working in your state’s weatherization office who need to have knowledge about the following list of health and safety topics, how well trained were they in each area? Please use the following scale: 1– not at all well trained; 2 – not well trained; 3 – moderately well trained; 4 –well trained; 5 – very well trained; 6 – not applicable *Circle best answer.*

(1) Fire safety	1	2	3	4	5	6
(2) Indoor air quality	1	2	3	4	5	6
(3) Measures to increase security of housing unit	1	2	3	4	5	6
(4) Measures to reduce common household hazards	1	2	3	4	5	6
(5) Mold and mildew	1	2	3	4	5	6
(6) Lead	1	2	3	4	5	6
(7) Asbestos	1	2	3	4	5	6
(8) Vermiculite	1	2	3	4	5	6
(9) General crew safety	1	2	3	4	5	6
(10) Other health and safety	1	2	3	4	5	6
(11) Other (please specify)	1	2	3	4	5	6

2. On which of the following weatherization subjects did staff working in your state's weatherization office receive training in Program Year 2008 from DOE, your state, or other entities? (Check all that apply)

- (1) Diagnostic procedures _____
- (2) Insulation _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (3) Space heating, ventilation, air conditioning _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (4) Infiltration measures _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (5) Doors and windows _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (6) Hot water heating _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (7) Baseloads (e.g., lighting, refrigerators) _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____

2a. On which administration-related topics did staff working in your state's weatherization office receive training in Program Year 2008 from DOE, your state, or other entities? (Check all that apply)

- (1) Management _____
- (2) Client education _____
- (3) Auditing/estimating _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (4) Monitoring/quality control _____
- (5) Financial topics _____
- (6) Outreach and communications _____
- (7) Other (please specify) _____

2b. On which health and safety topics did staff working in your state's weatherization office receive training in Program Year 2008 from DOE, your state, or other entities? (Check all that apply.)

- Fire safety
- Indoor air quality
- Measures to increase security of housing unit
- Measures to reduce common household hazards
- Mold and mildew
- Lead
- Asbestos
- Vermiculite
- General crew safety
- Other health and safety
- Other (please specify

3. For those staff working in your state’s weatherization office who need to have knowledge about the following list of diagnostic topics, how well trained were they in each area in PY 2008? Please use the following scale: 1– not at all well trained; 2 – not well trained; 3 – moderately well trained; 4 –well trained; 5 – very well trained; 6 – not applicable *Circle best answer.*

Pressure diagnostics:

- Blower door (house air leakage rate) 1 2 3 4 5 6
- Zonal pressure measurements 1 2 3 4 5 6
- Room-to-room pressure measurements 1 2 3 4 5 6
- Duct pressure pan measurements 1 2 3 4 5 6
- Duct blower measurements (duct air leakage rate) 1 2 3 4 5 6

Space-heating system:

- Flue gas analysis (steady-state efficiency measurements) 1 2 3 4 5 6
- Heat rise measurements 1 2 3 4 5 6
- CO measurements in flues 1 2 3 4 5 6
- Draft/spillage (normal operation) 1 2 3 4 5 6

Air-conditioning system:

- Refrigerant charge (e.g., superheat, subcooling) 1 2 3 4 5 6

HVAC components and cross-cutting diagnostics:

- Air handler flow rate 1 2 3 4 5 6
- Thermostat anticipator current 1 2 3 4 5 6
- Worst case draft/spillage (CAZ) 1 2 3 4 5 6

Hot-water (water-heating) system:

- Flue gas analysis (steady-state efficiency measurements) 1 2 3 4 5 6
- CO measurements in flues 1 2 3 4 5 6
- Draft/spillage (normal operation) 1 2 3 4 5 6
- Water flow rates (showerheads and faucets) 1 2 3 4 5 6

Other CO measurements:

- CO measurements in equipment rooms 1 2 3 4 5 6
- Cooking stove 1 2 3 4 5 6
- CO measurements in living areas 1 2 3 4 5 6

Other diagnostics and inspections:

- Refrigerator energy use 1 2 3 4 5 6
- Exhaust fan air flow rate measurement 1 2 3 4 5 6
- Infrared scanning (camera) 1 2 3 4 5 6
- Radon testing 1 2 3 4 5 6
- Lead testing 1 2 3 4 5 6
- Mold and mildew testing 1 2 3 4 5 6
- Moisture context testing 1 2 3 4 5 6
- Other (please specify) _____ 1 2 3 4 5 6

4. On which of the following diagnostic procedures did staff working in your state's weatherization office receive training in Program Year 2008 from DOE, your state, or other entities? (Check all that apply.)

Pressure diagnostics:

- Blower door (house air leakage rate) _____
- Zonal pressure measurements _____
- Room-to-room pressure measurements (distribution balancing) _____
- Duct pressure pan measurements _____
- Duct blower measurements (duct air leakage rate) _____

Space-heating system:

- Flue gas analysis (steady-state efficiency measurements) _____
- Heat rise measurements _____
- CO measurements in flues _____
- Draft/spillage (normal operation) _____

Air-conditioning system:

- Refrigerant charge (e.g., superheat, subcooling) _____

HVAC components and cross-cutting diagnostics:

- Air handler flow rate _____
- Thermostat anticipator current _____
- Worst case draft/spillage (CAZ) _____

Hot-water (water-heating) system:

- Flue gas analysis (steady-state efficiency measurements) _____
- CO measurements in flues _____
- Draft/spillage (normal operation) _____
- Water flow rates (showerheads and faucets) _____

Other CO measurements:

- CO measurements in equipment rooms _____
- Cooking stove _____
- CO measurements in living areas _____

Other diagnostics and inspections:

- Refrigerator energy use _____
- Exhaust fan air flow rate measurement _____
- Infrared scanning (camera) _____
- Radon testing _____
- Lead testing _____
- Mold and mildew testing _____
- Moisture context testing _____
- Other (please specify) _____

5. Please indicate the number of your state's weatherization office staff who received training in these three job function areas by attending the following events in Program Year 2008.

Training events	Job Function					
	Management and Administration		Field Monitoring and Auditing		Training and Technical Assistance	
	Primarily Classroom Training	Primarily Field Training	Primarily Classroom Training	Primarily Field Training	Primarily Classroom Training	Primarily Field Training
National Weatherization Program conference						
Affordable Comfort Conference						
Other national conference						
Regional weatherization conference						
State weatherization conference						
Other state conference						
State/regional training center class						
Manufacturer's training school class						
Utility training class						
Class sponsored by your state and taught at some central location (e.g., state office, local agency)						
Class not sponsored by your state (e.g., another state, trade organization)						
In-person expert visit to state (e.g., peer exchange, consultant)						
Web cast						
Conference call						
Other (please specify: _____)						

6. For each broad subject listed in the left-most column of the following table, put a check mark in the appropriate cell(s) to indicate which training method(s) you believe were most effective for imparting key skills and information in that area to your state's in-house staff and any non-agency staff supporting the state program who work under contract to the state in PY 2008:

Subject	Conferences	Primarily Classroom Training	Primarily Field Training	In-person expert visits	Web casts	Other (specify)
Management						
Weatherization skills and methods						
Auditing/Estimating/Measure selection						
Monitoring and quality control						
Financial topics						
Outreach and communications						
Health and safety						
Diagnostic procedures						
Client education						
Other (specify)						

7. For each broad subject listed in the left-most column of the following table, please indicate the quality of training received in Program Year 2008 at the training venues listed in the column headings. Please leave cells blank were your in-house staff did not receive training during this period of time. Please use the following scale: 1-very low; 2 - low; 3-medium; 4- high; 5-very high

	National Weatherization Program Conference	Affordable Comfort Conference	Regional Weatherization Conference	State Weatherization Conference	State/Regional Training Center	Training Provided by Your Own State
Subject						
Management						
Weatherization skills and methods						
Auditing/Estimating						
Monitoring/quality control						
Financial topics						
Outreach and communications						
Health and safety						
Diagnostic procedures						
Procedures for selecting weatherization measures						
Client education						
Other (specify)						

8. On which of the following weatherization topics did your state provide training to your state's local weatherization agencies or their contractors in Program Year 2008? (Check all that apply)

- (1) Diagnostic procedures _____
- (2) Insulation _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (3) Space heating, ventilation, air conditioning _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (4) Infiltration measures _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (5) Doors and windows _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (6) Hot water heating _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (7) Baseloads (e.g., lighting, refrigerators) _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____

8a. On which of the following administrative-related topics did your state provide training to your state's local weatherization agencies or their contractors in Program Year 2008? (Check all that apply)

- (1) Management _____
- (2) Client education _____
- (3) Auditing/estimating _____
 - single family dwellings _____
 - multifamily dwellings _____
 - mobile homes _____
- (4) Monitoring/quality control _____
- (5) Financial topics _____
- (6) Outreach and communications _____
- (7) Other (please specify) _____

8b. On which of the following health and safety topics did your state provide training to your state's local weatherization agencies or their contractors in Program Year 2008? (Check all that apply)

- Fire safety
- Indoor air quality
- Measures to increase security of housing unit
- Measures to reduce common household hazards
- Mold and mildew
- Lead
- Asbestos
- Vermiculite
- General crew safety
- Other health and safety
- Other (please specify)

9. On which of the following diagnostic procedures did your state provide training to your state's local weatherization agencies or their contractors in Program Year 2008? (Check all that apply)

Pressure diagnostics:

- Blower door (house air leakage rate) _____
- Zonal pressure measurements _____
- Room-to-room pressure measurements (distribution balancing) _____
- Duct pressure pan measurements _____
- Duct blower measurements (duct air leakage rate) _____

Space-heating system:

- Flue gas analysis (steady-state efficiency measurements) _____
- Heat rise measurements _____
- CO measurements in flues _____
- Draft/spillage (normal operation) _____

Air-conditioning system:

- Refrigerant charge (e.g., superheat, subcooling) _____

HVAC components and cross-cutting diagnostics:

- Air handler flow rate _____
- Thermostat anticipator current _____
- Worst case draft/spillage (CAZ) _____

Hot-water (water-heating) system:

- Flue gas analysis (steady-state efficiency measurements) _____
- CO measurements in flues _____
- Draft/spillage (normal operation) _____
- Water flow rates (showerheads and faucets) _____

Other CO measurements:

- CO measurements in equipment rooms _____
- Cooking stove _____
- CO measurements in living areas _____

Other diagnostics and inspections:

- Refrigerator energy use _____
- Exhaust fan air flow rate measurement _____
- Infrared scanning (camera) _____
- Radon testing _____
- Lead testing _____
- Mold and mildew testing _____
- Moisture context testing _____
- Other (please specify) _____

10. Which of the following types of personnel did your state use to provide training to your state's local weatherization agencies or their contractors in Program Year 2008? (Check all that apply)

- DOE staff _____
- DOE contractor _____
- State staff _____
- State contractor _____
- Staff from another state _____
- State training center staff _____
- Local agency staff from your state _____
- Agency staff from another state _____
- Manufacturer representative _____
- Utility staff _____
- Representative from trade organization _____
- Consultant _____
- Other (please specify) _____

11. What types of credentials or experience were required of the personnel your state used to provide training to your state's local weatherization agencies or their contractors in Program Year 2008? (Check all that apply)

- Technical certification _____
- Extensive weatherization field experience _____
- Construction experience _____
- Extensive management experience _____
- Extensive experience with financial matters _____
- Other (please specify) _____

11a. Using the scale below, please indicate how important each credential was for trainers to have in PY 2008?

1= Very Unimportant; 2=Unimportant; 3= Important; 4=Very Important

- Technical certification _____
- Extensive weatherization field experience _____
- Construction experience _____
- Extensive management experience _____
- Extensive experience with financial matters _____
- Other (please specify) _____

14. On average, how well trained were local weatherization crews (both agency and contractor) in your state in the following weatherization topics in PY 2008? Please use the following scale: 1– not at all well trained; 2 – not well trained; 3 – moderately well trained; 4 –well trained; 5 – very well trained; 6 – not applicable *Circle best answer.*

(1) Diagnostic procedures	1	2	3	4	5	6
(2) Insulation						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(3) Space heating, ventilation, air conditioning						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(4) Infiltration measures						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(5) Doors and windows						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(6) Hot water heating						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(7) Baseloads (e.g., lighting, refrigerators)						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6

14a. On average, how well trained were local weatherization crews (both agency and contractor) in your state in the following administrative-related topics in PY 2008? Please use the following scale: 1– not at all well trained; 2 – not well trained; 3 – moderately well trained; 4 –well trained; 5 – very well trained; 6 – not applicable *Circle best answer.*

(1) Management	1	2	3	4	5	6
(2) Client education	1	2	3	4	5	6
(3) Auditing/estimating						
-- single family dwellings	1	2	3	4	5	6
-- multifamily dwellings	1	2	3	4	5	6
-- mobile homes	1	2	3	4	5	6
(4) Monitoring/quality control	1	2	3	4	5	6
(5) Financial topics	1	2	3	4	5	6
(6) Outreach and communications	1	2	3	4	5	6
(7) Other (please specify)	1	2	3	4	5	6

14b. On average, how well trained were local weatherization crews (both agency and contractor) in your state in the following health and safety topics in PY 2008? Please use the following scale: 1– not at all well trained; 2 – not well trained; 3 – moderately well trained; 4 –well trained; 5 – very well trained; 6 – not applicable *Circle best answer.*

(1) Fire safety	1	2	3	4	5	6
(2) Indoor air quality	1	2	3	4	5	6
(3) Measures to increase security of housing unit	1	2	3	4	5	6
(4) Measures to reduce common household hazards	1	2	3	4	5	6
(5) Mold and mildew	1	2	3	4	5	6
(6) Lead	1	2	3	4	5	6
(7) Asbestos	1	2	3	4	5	6
(8) Vermiculite	1	2	3	4	5	6
(9) General crew safety	1	2	3	4	5	6
(10) Other health and safety	1	2	3	4	5	6
(11) Other (please specify)	1	2	3	4	5	6

15. Overall, how well trained were your state’s weatherization crews in PY 2008? (Check best answer)

- Very well trained
 Well trained
 Moderately well trained
 Poorly trained
 Very poorly trained

MONITORING

1. About how many state weatherization office staff went into the field to monitor local weatherization agencies in your state in Program Year 2008? *{Note: do not include people who do quality assurance at the local agency level for the local agencies.}*

- State staff _____
- State contractors _____
- Other (please specify) _____

2. Which of the following types of post-weatherization quality control inspection did your state perform on weatherized dwelling units in Program Year 2008? (Check all that apply)

- Visual inspection of installed measures _____
- Verification of insulation depths/quantities _____
- Verification of operation of measures installed _____
- Assessment of quality of measures installed _____
- Identification of needed measures that were not installed _____
- Blower door test _____
- Heating system efficiency test (flue gas analysis) _____
- Draft/spillage tests of heating systems _____
- Carbon monoxide (CO) monitoring _____
- Infrared scanning _____
- Identification of unresolved health and safety issues _____
- Discussion with occupants _____
- Other (specify)_____ _____

3. Please indicate which types of post-weatherization quality control inspection listed below were initiated during three years before PY 2008? (Check all that apply)

- Visual inspection of installed measures _____
- Verification of insulation depths/quantities _____
- Verification of operation of measures installed _____
- Assessment of quality of measures installed _____
- Identification of needed measures that were not installed _____
- Blower door test _____
- Heating system efficiency test (flue gas analysis) _____
- Draft/spillage tests of heating systems _____
- Carbon monoxide (CO) monitoring _____
- Infrared scanning _____
- Identification of unresolved health and safety issues _____
- Discussion with occupants _____
- Other (specify)_____ _____

4. Please indicate the cost, the amount of training needed, the amount of time needed and the effectiveness of the following types of post-weatherization quality control inspection procedures relative to each other for PY 2008. Please use the following scale: 1 – very low; 2 – low; 3 – medium; 4 – high; 5 – very high.

Type of Post-Weatherization Quality Control Inspection	Cost	Training Needed	Time Needed	Effectiveness
Visual inspection of installed measures				
Verification of insulation depths/quantities				
Verification of operation of measures installed				
Assessment of quality of measures installed				
Identification of needed measures that were not installed				
Blower door test				
Heating system efficiency test (flue gas analysis)				
Draft/spillage tests of heating systems				
Carbon monoxide (CO) monitoring				
Infrared scanning				
Identification of unresolved health and safety issues				
Discussion with occupants				
Other (specify)				

5. On average, how many hours were spent by state weatherization office staff on-site conducting post-weatherization quality control in a typical weatherized home in Program Year 2008? _____
6. What types of credentials or experience were required of your post-weatherization quality control inspectors in your state weatherization office in Program Year 2008? (Check all that apply)
- Technical certification _____
 - Extensive experience performing pre-weatherization audits _____
 - Extensive experience performing weatherization work _____
 - Extensive experience supervising weatherization work _____
 - Construction experience _____
 - Other (please specify) _____

7. Please indicate their level of experience of the post-weatherization quality control inspectors in your state weatherization office for each of the following areas in Program Year 2008.

	Very High	High	Medium	Low	Very Low
Performing pre-weatherization audits					
Performing weatherization work					
Supervising weatherization work					
Working in construction					
Performing post-weatherization inspections					
Other (specify)					

8. On average, how frequently did state weatherization program office staff visit each local agency to conduct post-weatherization quality control inspections in Program Year 2008? (Check best answer)

- Weekly
- Monthly
- Quarterly
- Annually
- Other (please specify) _____

9. On how many dwelling units did your state perform post-weatherization quality control inspections in Program Year 2008? _____

9a. Of those inspected, approximately how many were found to have a problem significant enough to require a return visit by local agency weatherization crews? _____

9b. Of those requiring a return visit, how many had work done that probably resulted in more energy savings? _____

9c. What were the three most common problems found in the dwelling units inspected by your state in Program Year 2008?

10. In those cases where a Program Year 2008 post-weatherization quality control inspection revealed a problem with the job performed, what single action was most commonly taken in response to that finding? (Check best answer)

- Made agency send crew back to correct problem _____
- Made agency send crew supervisor to correct problem _____
- Sent someone from state office to correct problem _____
- No action taken _____
- Other (please specify) _____

11. What *other* actions were taken in Program Year 2008 in response to the discovery of a problem with the weatherization job performed? (Check all that apply)

- Made agency send original crew back to correct problem _____
- Made agency send different crew to correct problem _____
- Made agency send crew supervisor to correct problem _____
- Sent someone from state office to correct problem _____
- No action taken _____
- Other (please specify) _____

12. Which of the following monitoring tasks did your state perform in Program Year 2008 to check on the administration of local weatherization efforts? (Check all that apply)

- Verification of number of dwelling units weatherized _____
- Verification of clients' income eligibility _____
- Verification of average expenditure per weatherized unit _____
- Verification of material expenditures _____
- Verification that installed measures had an SIR of 1.0 or greater _____
- Examination of vehicle costs _____
- Examination of other equipment costs _____
- Examination of training and technical assistance (T&TA) costs _____
- Examination of administrative costs _____
- Examination of material inventory _____
- Interviews with agency staff _____
- Interviews with agency contractor staff _____
- Interviews with agency clients _____
- Other (please specify) _____

13. Please indicate which types of monitoring tasks listed below were initiated three years prior to PY 2008. (Check all that apply)

- Verification of number of dwelling units weatherized _____
- Verification of clients' income eligibility _____
- Verification of average expenditure per weatherized unit _____
- Verification of material expenditures _____
- Verification that installed measures had an SIR of 1.0 or greater _____
- Examination of vehicle costs _____
- Examination of other equipment costs _____
- Examination of training and technical assistance (T&TA) costs _____
- Examination of administrative costs _____
- Examination of material inventory _____
- Interviews with agency staff _____
- Interviews with agency contractor staff _____
- Interviews with agency clients _____
- Other (please specify) _____

14. Please indicate the cost, the amount of training needed, the amount of time needed and the effectiveness of the following types of monitoring tasks relative to each other for PY 2008. Please use the following scale: 1 – very low; 2 -- low; 3 – moderate; 4 –high; 5 – very high.

Type of Monitoring Tasks	Cost	Training Needed	Time Needed	Effectiveness
Verification of number of dwelling units weatherized				
Verification of clients' income eligibility				
Verification of average expenditure per weatherized unit				
Verification of material expenditures				
Verification that installed measures had an SIR of 1.0 or greater				
Examination of vehicle costs				
Examination of other equipment costs				
Examination of training and technical assistance (T&TA) costs				
Examination of administrative costs				
Examination of material inventory				
Interviews with agency staff				
Interviews with agency contractor staff				
Interviews with agency clients				
Other (specify)				

15. On average, how many hours were spent by state weatherization office staff on-site at each local agency monitoring agency administrative activities in Program Year 2008?

16. What types of credentials or experience were required of those who monitored the administration of local weatherization efforts in your state in Program Year 2008? *Check all that apply.*

- Technical certification _____
- Extensive experience performing pre-weatherization audits _____
- Extensive experience performing weatherization work _____
- Extensive experience supervising weatherization work _____
- Construction experience _____
- Extensive management experience _____
- Extensive finance experience _____
- Extensive experience administering local weatherization programs _____
- Other (please specify) _____

17. Please indicate their level of experience of the local agency monitors in your state weatherization office for each of the following areas in Program Year 2008.

	Very High	High	Moderate	Low	Very Low
Management					
Finance					
Administration of local weatherization programs					
Other (specify)					

18. On average, how frequently did state weatherization program office staff visit each local agency to monitor administrative activities in Program Year 2008? (Check best answer)

- Weekly
- Monthly
- Quarterly
- Annually
- Other (please specify) _____

19. For how many of the local weatherization agencies monitored in your state in Program Year 2008 was an administrative problem found that required corrective actions above and beyond acceptable findings and recommendations? _____

20. What were the three most common problems requiring corrective actions above and beyond acceptable findings and recommendations found in the local weatherization agencies monitored in your state in Program Year 2008?

21. In those cases where state monitoring of the administration of local weatherization efforts in Program Year 2008 revealed an administrative problem requiring corrective actions above and beyond acceptable findings and recommendations, what actions were taken in response? (Check all that apply)

- Sent written report to local agency _____
- Required corrective action _____
- Made presentation to local agency _____
- Sent someone from state office to help correct problem _____
- Sent state contractor to help correct problem _____
- No action taken _____
- Other (please specify) _____

22. Did the observation of problems with the quality of weatherization work lead to changes in weatherization training for local agency staff?

Yes

No

22a. If Yes, what changes were made? _____

23. Does your state observe weatherization training sessions to help identify potential problem areas for monitoring in the field (e.g., with respect to installation of measures that trainees seem to have trouble understanding)?

Yes

No

23a. If Yes, briefly describe how your in-field monitoring activities were affected by your training session observations.

