Weatherization Program Manager Training

State of Michigan

as of 6/15/26

Bureau of Community Action and Economic Opportunity
Weatherization Assistance Program

Student Workbook

STUDENT INSTRUCTIONS

Welcome to the Weatherization Program Manager Training Workbook. This workbook is designed to help you deepen your understanding of Michigan's Weatherization Assistance Program (WAP) and apply concepts described in the Weatherization Program Manager Guidebook (Version 1).

How to Use This Workbook

Complete each chapter's activities during class or guided training sessions.

Read all questions carefully — many activities require applying program rules, workflows, and decision-making.

Write directly into the space provided in the workbook is provided.

Deep-dive simulations mimic real program scenarios. Treat them as authentic cases you might encounter on the job.

Your instructor may discuss responses to enhance training objectives.

What You Will Learn: By completing the workbook, you will be able to:

- Understand the full WAP workflow from intake through closeout.
- Identify the responsibilities of key weatherization roles.
- Apply compliance rules across DOE, LIHEAP, and state funding sources.
- Assess and solve real-world program management challenges.
- Strengthen documentation, communication, and leadership practices.

Workbook Structure

Each chapter includes:

- Multiple Choice Questions
- Open-Response Questions
- A Deep-Dive Simulation
- Fillable answer spaces

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CHAPTER 1 WORKBOOK: Introduction

Section 1.1: Multiple-Choice Questions

Select the best answer.

1. The primary purpose of the Weatherization Program Manager Guidebook is to:
   A. Provide financial auditing procedures for agencies only
   B. Guide local weatherization operators through managing the full lifecycle of a weatherization project
   C. Train contractors on installation techniques
   D. Replace statewide policy and procedural requirements

2. Michigan's Weatherization Assistance Program is funded through:
   A. Only state appropriations
   B. DOE WAP and LIHEAP
   C. Private utility rebates
   D. Local millage and voter-approved taxes

3. A typical result of weatherization services for clients is:
   A. Higher utility bills
   B. Households save an average of about $372 per year on energy bills
   C. Mandatory home renovation projects
   D. A required co-payment for services

4. The Weatherization Program Manager Module in the statewide data system is designed to:
   A. Replace all auditor diagnostic tools
   B. Track job progress, monitor funding, and support compliance
   C. Eliminate the need for work orders
   D. Serve only as a financial reporting tool

5. Which of the following is not a core responsibility of a Program Manager?
   A. Overseeing audits and installations
   B. Managing compliance with federal and state policies
   C. Conducting final QCI inspections
   D. Coordinating funding streams

Section 1.2: Open-Ended Questions

Write your responses in the space provided.

1. In your own words, describe why the Program Manager role is considered the “bridge” of the weatherization network.

2. What are the key benefits to clients of receiving weatherization services?

3. Why is clear and consistent communication essential in a Program Manager’s leadership approach?

4. List at least three ways the statewide weatherization data system supports program accountability.

Section 1.3: Deep-Dive Simulation Scenario

Simulation: “Your First Week as a Program Manager”

You have just begun your role as a Weatherization Program Manager at a local Michigan agency. During your onboarding, you discover that jobs are stuck at different stages for long periods. Some applications are incomplete, several audits have missing documentation, and contractors report unclear work orders.

1. Identify three critical control points you should immediately review to diagnose workflow issues. Explain why each one matters.

2. What steps would you take to build communication pathways among intake, auditors, modelers, contractors, and QCIs?

3. Which elements of the statewide data system would you use first to understand job status and bottlenecks?

4. Based on Chapter 1, outline your 30-day action plan for stabilizing job flow and ensuring compliance. Include staff coordination, workflow checks, and communication steps.

CHAPTER 2 WORKBOOK: Program Structure and Roles

Section 2.1: Multiple-Choice Questions

1. The Program Manager's role is best described as:
   A. The person who performs energy audits
   B. The primary installer for all weatherization measures
   C. The conductor who ensures all roles are aligned and workflows move smoothly
   D. A fiscal specialist overseeing only budgeting

2. Which role performs the diagnostic testing and develops initial measure recommendations?
   A. Intake Specialist
   B. Energy Auditor
   C. Crew Leader
   D. QCI Inspector

3. The Modeler's primary responsibility is to:
   A. Install insulation and air-sealing measures
   B. Review audits for accuracy and cost-effectiveness before work assignment
   C. Conduct intake appointments with clients
   D. Approve fiscal claims

4. Which of the following must be independent from the installation process?
   A. Crew Leaders
   B. Program Manager
   C. Quality Control Inspector (QCI)
   D. Intake Specialist

5. The Weatherization Deferral Reduction Specialist focuses on:
   A. Performing final inspections
   B. Resolving issues that would otherwise cause a deferral
   C. Scheduling contractor work
   D. Reviewing fiscal allocations

6. A common Program Manager responsibility includes:
   A. Modeling energy savings
   B. Managing staff, contractors, and subcontractors
   C. Performing mold remediation
   D. Conducting blower-door testing

7. Which role ensures costs align with funding requirements and supports invoices and grant compliance?
   A. Intake Specialist
   B. Fiscal and Administrative Staff
   C. Energy Auditor
   D. Weatherization Crew Leader

8. A Compliance Monitor is responsible for:
   A. Installing DOE measures
   B. Performing internal file reviews, spot checks, and audits
   C. Managing intake workflows
   D. Creating work orders

Section 2.2: Open-Ended Questions

1. Describe how the “relay race” analogy applies to the weatherization workflow. What makes smooth handoffs essential?

2. What are three key responsibilities of the Program Manager that directly affect workflow and compliance?

3. Explain how the Intake Specialist and Weatherization Deferral Reduction Specialist work together to support strong production.

4. Why is the independence of the QCI essential to program integrity and compliance?

5. From a manager’s perspective, what challenges can arise if Modeler reviews are inconsistent or incomplete?

Section 2.3: Deep-Dive Simulation Scenario

Simulation: “Breaking the Bottleneck”

You have been the Program Manager at your agency for two months. You notice that jobs are consistently getting stuck between the energy audit and the installation phase. After reviewing several files, you find:

- Audits were completed, but some lack full diagnostic documentation.
- Modelers request corrections but auditors are slow to respond.
- Contractors report unclear measures in work orders.
- Intake files for several homes contain missing documents that were never corrected.
- Your deferral ratio has increased significantly over the last quarter.

1. Identify at least four roles contributing to this bottleneck and describe how each role’s performance affects job flow.

2. Based on your role as Program Manager, outline the corrective steps you would take to:
   - Improve interactions between auditors and modelers
   - Reduce backlog caused by unclear work scopes
   - Strengthen intake accuracy
   - Lower deferral rates

3. Propose a weekly communication structure (meetings, check-ins, dashboards, etc.) to keep all roles aligned and accountable.

4. Several staff members express confusion about expectations. Develop a brief plan to clarify roles, responsibilities, and handoff standards across the team.

CHAPTER 3 WORKBOOK: Funding Sources and Compliance

Section 3.1: Multiple-Choice Questions

1. Weatherization in Michigan is primarily funded by:
   A. DOE WAP, LIHEAP, and State H&S funds
   B. Property tax revenue
   C. Utility shareholder profits
   D. County-level block grants

2. Compliance is critical in weatherization programs because:
   A. It increases contractor profit
   B. It protects agencies from disallowed costs and funding loss
   C. It eliminates the need for monitoring
   D. It replaces the need for documentation

3. A common result of non-compliance is:
   A. Expanded funding
   B. More homes served
   C. Disallowed costs and potential repayment requirements
   D. Faster job flow

4. Which funding source typically supports core building-shell measures and requires cost-effectiveness (SIR) testing?
   A. State H&S funds
   B. DOE WAP
   C. Utility donations
   D. Local government funds

5. LIHEAP weatherization funds differ from DOE WAP because:
   A. They do not require SIR for measures
   B. They cannot fund mechanical replacements
   C. They are required to fund asbestos abatement
   D. They cannot be braided with other funds

6. A key responsibility of the Program Manager regarding compliance is to:
   A. Install weatherization measures personally
   B. Ensure documentation supports every expenditure
   C. Replace combustion appliances
   D. Complete state fiscal audits independently

7. State Health & Safety funds are primarily used to:
   A. Purchase vehicles and equipment
   B. Address hazards that would otherwise cause deferral
   C. Pay for window replacements only
   D. Support administrative salaries

8. “Braiding funds” refers to:
   A. Combining multiple funding sources to support different parts of a job
   B. Using only DOE funds for all work
   C. Mixing all funds together with no allocation requirements
   D. Replacing DOE with LIHEAP completely

9. A common compliance pitfall noted in monitoring is:
   A. Too many staff meetings
   B. Incorrect or missing documentation
   C. Over-communication with clients
   D. Spending too slowly on administrative costs

10. Jobs must be reported by the ____ of each month to the state.
   A. 1st
   B. 7th
   C. 14th
   D. 31st

Section 3.2: Open-Ended Questions

1. In your own words, explain why funding compliance is considered a core management responsibility.

2. Describe how DOE WAP, LIHEAP, and State Health & Safety funds complement each other in supporting a complete weatherization project.

3. What documentation or evidence does a Program Manager need to verify in order to prevent disallowed costs? Provide at least four examples.

4. Why is accurate allocation of measures to funding sources essential during work order development and closeout?

5. Explain how internal communication between the Program Manager and fiscal staff helps prevent funding or compliance problems.

Section 3.3: Deep-Dive Simulation Scenario

Simulation: “The Cost Allocation Crisis”

You are reviewing a set of files as part of your agency’s internal quality control. You discover:

- A home received attic insulation, mechanical ventilation improvements, and a furnace replacement.
- DOE WAP funds were used for the furnace replacement, but the SIR documentation is missing and the measure does not appear cost-effective.
- Several H&S measures were charged to LIHEAP without justification notes.
- A contractor invoice includes items not shown in the approved work scope.
- The Modeler reran the job twice but did not upload the updated modeling file.
- The reporting deadline (14th of the month) is in two days.

- Identify at least four compliance risks in this scenario and explain why they are concerning.

2. Outline the step-by-step corrective actions you would take before submitting the job for reimbursement.

   Address:

   - Documentation
   - Funding allocation
   - Work scope corrections
   - Staff communication
   - Coordination with fiscal

3. Several errors point to inconsistent internal processes. Describe the training or procedural improvements you would implement to prevent this from recurring.

4. Develop a brief internal “Compliance Checklist” (5–8 items) that staff must complete before a job can move to closeout.

CHAPTER 4 WORKBOOK: Client Intake and Eligibility

Section 4.1: Multiple-Choice Questions

1. The intake process determines all of the following except:
   A. Whether the client meets eligibility requirements
   B. Whether the home is safe for auditors and crews
   C. Whether the home automatically qualifies for all DOE measures
   D. Whether documentation is complete and correct

2. Intake staff are responsible for:
   A. Conducting blower door tests
   B. Verifying income or categorical eligibility
   C. Approving work orders
   D. Performing QCI inspections

3. A Program Manager is responsible for:
   A. Installing insulation
   B. Reviewing intake file completeness and accuracy
   C. Conducting energy audits
   D. Replacing water heaters

4. Eligibility for weatherization is typically based on:
   A. Household pets
   B. 200% of federal poverty guidelines or categorical eligibility
   C. Homeowner income only
   D. Utility company recommendations

5. A healthy inquiry list should be:
   A. Very small, with fewer than 10 clients
   B. Extremely large, stretching multiple years
   C. Well-managed, not too large or too small
   D. Closed for most of the year

6. Early health and safety red flags noted in intake may include:
   A. Blower door test failure
   B. Excessive clutter, mold, or structural issues
   C. Solar installation potential
   D. Existing insulation type

7. A unified WAP/LIHEAP application is valid for:
   A. 1 month
   B. 3 months
   C. 6 months
   D. 12 months

8. Managing client expectations at intake is important because:
   A. Weatherization is a fast service delivered in 1–2 days
   B. It prevents misunderstandings and helps clients understand timelines and possible delays
   C. It guarantees clients will receive all requested measures
   D. Clients must complete all work themselves

9. A high deferral rate may indicate:
   A. A normal part of workflow
   B. Strong audit performance
   C. A need to strengthen the Deferral Reduction Strategy
   D. Too many contractors

10. Intake documentation must include:
   A. Only the client's name and phone number
   B. Proof of eligibility, required signatures, and complete application materials
   C. Photos of the home's attic
   D. Contractor bids

Section 4.2: Open-Ended Questions

1. Describe how a strong intake process prevents downstream delays during audits, work order development, and installation.

2. Explain why managing the inquiry list is a critical part of the Program Manager's job. What problems can arise when the list is too large or too small?

3. List five examples of required intake documentation and explain why each one is important.

4. How does early identification of potential health and safety issues help reduce deferrals later in the weatherization process?

5. In your own words, describe how clear communication during intake helps shape client satisfaction throughout the entire weatherization workflow.

Section 4.3: Deep-Dive Simulation Scenario

Simulation: “The Intake Backlog”

Your intake team is struggling. During a routine review, you discover:

2. Many applications are missing key documents
3. Intake staff have not been consistently reviewing applications for completeness
4. Clients have been waiting months without communication
5. The inquiry list has grown to nearly 500 households
6. Several clients who were approved six months ago have not been scheduled for audits
7. Multiple files show potential H&S issues that were not flagged early

1. Identify at least five critical problems in this situation and explain how each will slow or disrupt job flow.

2. Outline a plan to stabilize intake operations over the next 30 days. Include:
    - Documentation standards
    - Staff workflow changes
    - Client communication
    - Deferral screening improvements
    - Inquiry list management

3. Several clients complain they were given unrealistic expectations about timelines. Describe how you would reset expectations and improve intake communication agency-wide.

4. Develop a new “Intake Quality Checklist” (6–10 items) that your staff must use before any file can move to audit or pre-inspection.

CHAPTER 5 WORKBOOK: The Energy Audit Process

Section 5.1: Multiple-Choice Questions

1. The primary purpose of the energy audit is to:
   A. Replace mechanical systems
   B. Identify cost-effective measures, safety concerns, and diagnostic needs
   C. Generate contractor bids
   D. Perform QCI inspections

2. A typical energy audit lasts:
   A. 15–30 minutes
   B. 1 hour
   C. 3–4 hours
   D. All day

3. Which of the following is required diagnostic testing during an audit?
   A. Solar exposure analysis
   B. Blower door test
   C. Roofing load calculation
   D. Exterior asbestos sampling

4. The Modeler must:
   A. Perform all on-site testing
   B. Review audit data for accuracy and cost-effectiveness before work moves forward
   C. Install measures that the auditor recommends
   D. Manage intake documentation

5. Health and safety hazards identified during the audit must be:
   A. Ignored until installation
   B. Documented clearly and addressed before or during weatherization
   C. Told verbally to contractors only
   D. Charged automatically to LIHEAP

6. Missing audit documentation can lead to:
   A. Faster work order approval
   B. Fewer required measures
   C. Rework, delays, and monitoring findings
   D. Automatic cost-effectiveness

7. A Program Manager's audit-stage responsibilities include:
   A. Performing blower door testing
   B. Reviewing audit completeness and documentation accuracy
   C. Removing old mechanical equipment
   D. Performing contractor invoicing

8. Audit diagnostics must be:
   A. Estimated based on auditor experience
   B. Collected only if the client requests it
   C. Documented thoroughly with test results and photos
   D. Delegated to contractors

9. Use of the statewide data system during audits includes:
   A. Creating contractor pay sheets
   B. Tracking assignments, uploading results, and flagging missing information
   C. Generating tax documents
   D. Recording QCI certifications

10. One common audit error is:
    A. Too many health and safety notes
    B. Missing diagnostics or inconsistent measure justification
    C. Too many attic photos
    D. Over-communication with clients

Section 5.2: Open-Ended Questions

1. Explain why the audit is considered the “backbone” of the entire weatherization process.

2. Describe the relationship between the Energy Auditor and the Modeler. How do their roles support each other?

3. Identify three health and safety hazards that an auditor might uncover and explain how each impacts the job.

4. Why is thorough on-site documentation (photos, notes, diagnostics) essential for work order development and compliance?

5. Describe how the statewide data system helps ensure audit quality, accuracy, and compliance.

Section 5.3: Deep-Dive Simulation Scenario

Simulation: “The Incomplete Audit File”

You are reviewing several audit files that were recently submitted. You find:

- Multiple blower door results are missing
- Health and safety hazards (mold, asbestos suspicion, CO spillage) have inconsistent documentation
- Photos do not match notes in the file
- Modelers report frequent re-runs due to incomplete inputs
- Crews are waiting for work orders, causing production delays
- The statewide system shows alerts for missing forms and diagnostics

1. Identify at least five audit-stage problems in this scenario and explain why each is a risk to job flow and compliance.

2. As Program Manager, outline a corrective action plan to improve audit quality within the next 30 days. Include:
    - Staff communication
    - Retraining
    - Quality assurance checks
    - Documentation standards
    - Workflow expectations

3. Develop a list of “Audit Field Standards” (6–8 items) that auditors must follow on every job.

4. Modelers are overwhelmed with inconsistent files. Describe how you will strengthen coordination and communication between auditors and modelers.

CHAPTER 6 WORKBOOK: Work Order Development and Approval

Section 6.1: Multiple-Choice Questions

1. The purpose of the work order is to:
   A. Replace the need for an audit
   B. Convert audit findings and modeling into a clear installation plan
   C. Provide a draft for contractors to modify freely
   D. Serve as a fiscal-only document

2. A high-quality work order must:
   A. Contain only measure names
   B. Provide detailed measure descriptions, quantities, and locations
   C. Leave material decisions to contractors
   D. Allow installers to select funding sources

3. Which role ensures modeling accuracy before releasing a job to production?
   A. QCI Inspector
   B. Intake Specialist
   C. Modeler
   D. Contractor

4. Work orders must always align with:
   A. Contractor preferences
   B. DOE, LIHEAP, and state funding rules
   C. Homeowner requests only
   D. The installation schedule

5. A Program Manager reviewing a work order should look for:
   A. Whether the scope is “buildable” for crews
   B. Whether the contractor can do it fastest
   C. Whether the home is aesthetically pleasing
   D. Whether the auditor liked the job

6. A common cause of downstream installation problems is:
   A. Too many photos
   B. A vague or incomplete work order
   C. Providing too much detail
   D. Excessive QCI review

7. Every measure in the work order must be:
   A. Funded by H&S dollars
   B. Supported by audit findings and justified by modeling
   C. Suggested by contractors
   D. Optional for QCIs to verify

8. Funding allocations in the work order must:
   A. Be left for fiscal staff to decide later
   B. Follow allowable uses and be documented clearly
   C. Change with contractor preferences
   D. Be assigned randomly when unsure

9. Work orders must be uploaded to the statewide system:
   A. Only after installation is complete
   B. Before scheduling and production
   C. Only during closeout
   D. Only when contractors request them

10. A Program Manager must ensure the client:
    A. Approves all measures with clear explanation before installation
    B. Writes their own scope of work
    C. Selects the contractor they prefer
    D. Pays out of pocket for health and safety items

Section 6.2: Open-Ended Questions

1. Describe how audit findings and modeling results must align to produce a compliant work order. Why is this alignment essential?

2. What makes a work order "buildable," and why is this an important concept for Program Managers?

3. Explain why clarity in measure descriptions (quantities, locations, materials) is crucial for contractors and crews. Provide an example.

4. Describe the Program Manager's review responsibilities before approving a work order.

5. Describe how improper funding allocations in a work order could lead to monitoring findings or disallowed costs.

Section 6.3: Deep-Dive Simulation Scenario

Simulation: “The Confusing Work Order”

You are reviewing a work order that has caused confusion for both contractors and the QCI. You find:

- Several measures listed in the scope do not appear in the audit photos
- Diagnostic values in the model do not match auditor notes
- A furnace replacement has been assigned DOE funds but lacks cost-effectiveness documentation
- Health and safety line items do not include justification text
- The contractor reports unclear instructions on insulation locations
- The statewide system shows missing uploads for the updated model rerun
- The client has not yet reviewed or signed the measure approval form

1. Identify at least five compliance or workflow risks present in this work order. Explain why each is problematic.

2. As Program Manager, outline your corrective action plan, including:
   - Audit/model reconciliation
   - Work order corrections
   - Contractor communication
   - Documentation updates
   - Client approvals

3. Develop a “Work Order Quality Checklist” (8–10 items) that must be completed before any scope is approved or assigned.

4. Explain how you would prevent similar issues through staff training or process improvements.

CHAPTER 7 WORKBOOK: Contractor or Crew Management

Section 7.1: Multiple-Choice Questions

1. A Program Manager's role in contractor and crew management includes:
   A. Personally conducting final inspections
   B. Ensuring assignments match contractor/crew capacity and skill set
   C. Performing installation work when crews are unavailable
   D. Approving client eligibility

2. A major factor that influences scheduling efficiency is:
   A. Giving every job to the same contractor
   B. Assigning jobs based on staff preference
   C. Matching work orders with the right team based on skills and workload
   D. Scheduling jobs in the order applications were received

3. Contractors must have up-to-date:
   A. Energy modeling certifications
   B. Insurance, licensing, and required safety training
   C. Marketing materials
   D. Utility partnership agreements

1. One of the biggest risks of poor scheduling is:
   A. Too much QCI oversight
   B. Overloading certain crews or contractors
   C. Excessive client education
   D. Too many intake staff

2. Change orders must be:
   A. Handled informally between installers and clients
   B. Documented, justified, and communicated to all appropriate staff
   C. Avoided at all costs
   D. Submitted only at closeout

3. Contractor relationships are strengthened when:
   A. Work is scheduled without considering their availability
   B. Expectations are inconsistent
   C. Communication is clear, timely, and fair
   D. Contractors choose which measures to install on each job

4. Health & safety protocols during installation require Program Managers to ensure crews:
   A. Skip PPE to work faster
   B. Follow OSHA, lead-safe practices, and weatherization safety standards
   C. Perform diagnostic tests only if convenient
   D. Defer hazards without documentation

5. The statewide system helps Program Managers by:
   A. Automatically selecting contractors
   B. Tracking installation progress, documentation, and uploads
   C. Completing audits without staff involvement
   D. Replacing QCI inspections

6. A common cause of installation delays includes:
   A. Over-communication with clients
   B. Discovery of unforeseen structural or moisture issues
   C. Scheduling too early in the season
   D. Taking too many jobsite photos

7. A Program Manager ensures contractor performance by:
   A. Avoiding direct communication
   B. Regular monitoring, feedback, and addressing performance problems
   C. Allowing contractors to self-audit their work
   D. Reducing documentation requirements

Section 7.2: Open-Ended Questions

1. In your own words, describe the Program Manager's role in balancing contractor/crew workloads while maintaining quality and timeliness.

2. Explain why contractor onboarding (training, expectations, documentation) is essential for smooth weatherization operations.

3. Describe three reasons why prompt and well-documented change orders are important for compliance and production.

4. List several installation-phase health and safety issues that require immediate Program Manager oversight. Explain why each is critical.

5. How can a Program Manager use the statewide system to identify installation bottlenecks or performance concerns? Provide examples.

Section 7.3: Deep-Dive Simulation Scenario

Simulation: “The Strained Contractor Pipeline”

Your agency works with three contractors and one in-house crew. Over the last two months:

2. Contractor A is behind on 6 jobs
3. Contractor B is producing high-quality work but is overwhelmed by new assignments
4. Contractor C has incomplete insurance records and is temporarily suspended
5. The in-house crew reports unclear work orders
6. Clients are reporting long delays between the audit and installation
7. Change orders are being submitted without documentation or approval
8. Several H&S issues were identified in the field but not communicated back to the Program Manager

1. Identify at least five critical problems affecting the installation pipeline and explain how each impacts production or compliance.

2. Outline your immediate action plan to stabilize contractor performance, including:
    - Scheduling adjustments
    - Contractor communication
    - Suspension and reinstatement expectations
    - Work order clarification
    - Change-order controls

3. Develop a “Contractor & Crew Management Protocol” (6–10 items) that sets clear expectations for communication, work quality, safety, and documentation.

4. Propose a monthly contractor performance meeting agenda that ensures accountability and continuous improvement.

CHAPTER 8 WORKBOOK: Retrofit Installation and Work Progress

Section 8.1: Multiple-Choice Questions

1. Installation work must follow:
   A. Contractor preference
   B. DOE, state technical standards, BPI best practices, and ASHRAE ventilation rules
   C. Only local building codes
   D. Client requests

2. A Program Manager's installation-phase responsibilities include:
   A. Performing all on-site insulation work
   B. Monitoring job progress and reviewing documentation submitted during installation
   C. Creating vendor purchase orders
   D. Running blower door tests during QCI

3. Health and safety protocols require crews to:
   A. Skip PPE if the job is small
   B. Follow OSHA rules, weatherization safety practices, and lead-safe requirements
   C. Defer all hazards automatically
   D. Perform work without combustion safety checks

4. Installation delays may be caused by:
   A. Discovery of structural or moisture issues
   B. Too many photos in the audit
   C. Excessive QCI oversight
   D. Lack of utility bills

5. The statewide system supports installation progress by:
   A. Auto-assigning contractors
   B. Tracking measure-level updates and photo uploads
   C. Eliminating the need for documentation
   D. Performing final inspections automatically

6. Program Managers must ensure crews:
   A. Document installation work as they go
   B. Ignore mid-installation hazards
   C. Skip updates if the job is behind schedule
   D. Do not upload photos until after QCI

7. A common installation-stage issue affecting QCI results is:
   A. Too many client communications
   B. Unauthorized work order/scope changes or incomplete measures
   C. Overuse of H&S funds
   D. Too many audit photos

8. Clients should receive communication during installation that is:
   A. Minimal to avoid confusion
   B. Clear, respectful, and aligned with the work schedule
   C. Only provided by contractors
   D. Only provided at the end of installation

9. Before QCI is scheduled, the Program Manager must ensure:
   A. Crews have added optional measures
   B. Measure-level documentation is complete and all punch-list items addressed
   C. Clients have prepaid for services
   D. Modelers have rerun the audit

10. Troubleshooting delays requires:
    A. Waiting until closeout to resolve issues
    B. Proactive management, reassignment, and coordination with crews and contractors
    C. Ignoring unexpected site conditions
    D. Rescheduling jobs only once per month

Section 8.2: Open-Ended Questions

1. Describe how installation quality influences QCI outcomes, client satisfaction, and monitoring results.

2. Explain how the statewide system helps the Program Manager track installation progress and documentation accuracy. Include specific examples.

3. What health and safety protocols must crews follow during installation, and why are these critical to program success?

4. Describe three common installation-phase issues that create bottlenecks and how the Program Manager can address them.

5. In your own words, explain the Program Manager's oversight responsibilities during installation. Why is active involvement necessary?

Section 8.3: Deep-Dive Simulation Scenario

Simulation: “Installation Standstill”

Your agency’s installation pipeline has slowed dramatically. A review reveals:

- Crews are reporting incomplete or unclear installation instructions
- Some measures were installed in incorrect locations
- Photo documentation is inconsistent or missing
- A major health and safety issue (possible CO backdrafting) was not reported
- Contractors state that work orders conflict with on-site conditions
- Clients are reporting confusion about the schedule
- Several jobs are ready for QCI, but documentation is incomplete in the statewide system

1. Identify at least five major problems in this installation scenario and explain how each affects quality, safety, or job flow.

2. Outline a corrective action plan to restore the installation workflow, including:
   - Clarification of work orders
   - Improved documentation standards
   - Contractor/crew communication
   - Health & safety reporting expectations
   - System updates and checks

3. Develop a “Measure-Level Installation Checklist” (6–10 items) that installers must complete before calling a job “ready for QCI.”

4. Describe how you would improve client communication practices to ensure the homeowner is informed, prepared, and supported during installation.

CHAPTER 9 WORKBOOK: Final Inspection (QCI)

Section 9.1: Multiple-Choice Questions

1. The primary purpose of the Quality Control Inspection (QCI) is to:
   A. Provide contractors with a performance review
   B. Confirm all work meets standards, safety requirements, and the approved work scope
   C. Replace the need for an energy audit
   D. Approve future funding allocations

2. QCI must be performed by:
   A. The crew leader who installed the measures
   B. The Program Manager
   C. A certified inspector independent from auditing, modeling, and installation
   D. Any available staff member

3. Which of the following must occur before QCI can begin?
   A. Contractors submit their next job
   B. The statewide system assigns a QCI automatically
   C. Installation documentation is complete and all rework/punch-list items are finished
   D. Fiscal staff approve invoices

4. If a QCI identifies a deficiency, the Program Manager must:
   A. Delay corrections until closeout
   B. Assign rework quickly and ensure documentation is complete
   C. Ask the client to fix the issue
   D. Close the job anyway to meet reporting deadlines

5. QCI documentation must include:
   A. Contractor invoices
   B. Diagnostic test results, photos, inspection notes, and pass/fail outcomes
   C. Intake documents
   D. Modeler review notes

6. A failed QCI often indicates:
   A. Strong installation quality
   B. A need for additional training, communication improvements, or clearer work orders
   C. Too many audits were scheduled
   D. The client is dissatisfied

7. A Program Manager's role in QCI includes:
   A. Performing the inspection personally
   B. Reviewing results, ensuring corrections, and monitoring trends
   C. Approving contractor work hours
   D. Rerunning audit diagnostics

8. QCI helps strengthen the weatherization program by:
   A. Increasing the number of change orders
   B. Identifying training opportunities and improving quality
   C. Eliminating the need for intake
   D. Reducing required documentation

9. QCI scheduling must be:
   A. Deferred until all jobs in the pipeline are complete
   B. Completed promptly after installation to avoid backlogs
   C. Performed before installation
   D. Done only when the fiscal team approves it

10. Which of the following is a critical requirement for QCI independence?
    A. Inspectors cannot communicate with auditors
    B. The inspector must not perform any part of the installation
    C. Inspectors must work for a different agency
    D. Inspectors cannot review documentation

Section 9.2: Open-Ended Questions

1. Explain why QCI independence is important for program integrity and compliance.

2. Describe the types of documentation that must be reviewed and completed before scheduling a QCI. Why does this matter?

3. What are some common reasons for QCI failures, and how can a Program Manager proactively prevent them?

4. How should a Program Manager respond when repeated deficiencies appear across multiple jobs?

5. Describe how you would use QCI trend data to improve training, workflow, and program outcomes.

Section 9.3: Deep-Dive Simulation Scenario

Simulation: “A Pattern of Failed QCIs”

Over the past month, your agency has had several QCI failures. You review the files and find:

- Multiple homes lack proper ventilation after installation
- Crews deviated from the work order without documentation
- Diagnostic test results do not match installation photos
- Several health and safety issues (CO concerns, wiring hazards) were missed
- Rework has been slow and inconsistently documented
- The statewide system shows missing QCI uploads for two jobs
- Contractors express confusion about expectations and funding rules

1. Identify at least five major problems reflected in these QCI failures and explain why each is serious.

2. Outline a corrective action plan to stabilize QCI performance, including:
   - Communication with contractors and crews
   - Training priorities
   - Documentation expectations
   - Health & safety oversight
   - System updates and quality checks

3. Develop a “QCI Readiness Checklist” (8–12 items) that crews and contractors must complete before the QCI is scheduled.

4. Describe how you would use QCI data to develop targeted staff or contractor training. Provide at least three examples.

CHAPTER 10 WORKBOOK: Job Closeout

Section 10.1: Multiple-Choice Questions

1. Job closeout cannot begin until:
   A. The client submits a satisfaction survey
   B. QCI is complete and all documentation is finalized
   C. The Program Manager visits the home in person
   D. Contractors approve the final invoice

2. A complete closeout file must include:
   A. Only the work order and contractor invoice
   B. Audit report, diagnostics, H&S documentation, modeling files, QCI report, photos, signatures, and funding allocation details
   C. Utility rebate applications
   D. Only client signatures and site photos

3. One major purpose of closeout is to:
   A. Ensure jobs are reported for reimbursement properly and on time
   B. Replace audit documentation
   C. Skip QCI steps
   D. Reduce contractor workload

4. Energy savings calculations must:
   A. Be estimated manually
   B. Match the final modeling and measure package
   C. Be skipped if the home used LIHEAP funds
   D. Be entered only at the end of the year

5. Cost allocation errors during closeout can result in:
   A. Faster reimbursement
   B. Disallowed costs or repayment requirements
   C. Contractor bonuses
   D. More flexibility in future funding

6. Program Manager responsibilities during closeout include:
   A. Re-auditing the home
   B. Verifying documentation completeness and accuracy before file approval
   C. Performing the installation work
   D. Skipping client education if the job was small

7. Closeout includes:
   A. Reviewing fiscal reconciliation and cost allocation
   B. Conducting new diagnostic testing
   C. Assigning jobs to contractors
   D. Re-creating all paperwork from scratch

8. All jobs must be reported as closed to the state by:
   A. The 1st of the month
   B. The 7th of the month
   C. The 14th of the month
   D. The last day of the month

9. A strong closeout process improves:
   A. Monitoring outcomes, reimbursement timelines, and documentation quality
   B. Contractor marketing
   C. Client waitlist lengths
   D. The number of deferrals

10. Archiving records after closeout requires:
    A. Discarding all digital files
    B. Storing records securely per DOE/state retention rules and completing post-job data audits
    C. Only keeping intake files
    D. Keeping records only until contractor payment processes

Section 10.2: Open-Ended Questions

1. Explain why a complete and accurate closeout file is essential for compliance and reimbursement.

2. Describe how closeout documentation ties together all stages of the weatherization workflow (intake → audit → installation → QCI).

3. Identify three types of documentation that must be reviewed in detail during closeout and explain why each is important.

4. What kinds of funding reconciliation issues might arise during closeout, and how should program managers address them?

5. Describe how the Program Manager's final sign-off serves as a compliance safeguard.

Section 10.3: Deep-Dive Simulation Scenario

Simulation: “The Closeout Chaos”

Your agency is falling behind on monthly reporting. A review reveals:

- Several job files are missing QCI reports
- Some modeling files were never updated after change orders
- A few work orders and installation photos do not match final invoices
- Health & safety justifications are missing in two files
- Cost allocations do not align with measure documentation
- Fiscal staff report delays because files are incomplete when submitted
- The statewide system shows closeout errors for multiple jobs

1. Identify at least five major closeout issues and explain why each creates a compliance or reimbursement risk.

2. Outline a closeout stabilization plan addressing:
   - Documentation standards
   - Staff responsibilities
   - File review procedures
   - Coordination with fiscal staff
   - System checks and data quality

3. Develop a “Closeout File Quality Checklist” (8–12 items) to ensure files are accurate before approval.

4. Describe how you would improve communication between Program staff and fiscal staff to eliminate billing delays.

CHAPTER 11 WORKBOOK: Managing Data and the Statewide System

Section 11.1: Multiple-Choice Questions

1. The primary purpose of the statewide manager module is to:
   A. Replace fiscal reporting requirements
   B. Provide real-time oversight of jobs, documentation, staff workload, and compliance
   C. Allow contractors to self-approve scopes
   D. Replace the QCI process

2. A key feature of the dashboards in the manager module is:
   A. Tracking job status and identifying bottlenecks
   B. Automatically closing out jobs
   C. Updating contractor insurance
   D. Eliminating the need for intake review

3. The module provides alerts for:
   A. Missing and incomplete documentation
   B. Contractor tax paperwork
   C. Weather forecasts
   D. Staff vacation requests

4. Using the statewide system, the Program Manager can:
   A. Perform blower door tests remotely
   B. Assign tasks and monitor staff workloads
   C. Approve fiscal audits
   D. Install measures digitally

5. Data quality issues can lead to:
   A. Faster production
   B. Monitoring findings, delays, and inaccurate reporting
   C. Fewer audit requirements
   D. Unlimited funding flexibility

6. A Program Manager must ensure that data is entered:
   A. Inconsistently, to avoid patterns
   B. Only at the end of the year
   C. Consistently, accurately, and in real time
   D. Only by contractors

7. System reports can be used to:
   A. Forecast production and track progress toward agency goals
   B. Replace intake documentation
   C. Eliminate the need for Modelers
   D. Automatically schedule contractors

8. The statewide system helps identify training needs by:
   A. Showing which staff are not using the system at all
   B. Automatically enrolling staff in courses
   C. Tracking repeat errors, bottlenecks, and documentation gaps
   D. Sending trainees directly to the state office

9. “If it isn’t in the system, it didn’t happen” means:
   A. Documentation is optional
   B. Only contractors need to upload documents
   C. All work, data, and decisions must be fully documented
   D. Verbal communication replaces digital uploads

10. A major risk of poor data management is:
    A. Faster job flow
    B. Stronger contractor performance
    C. Incomplete or inaccurate reporting to DOE/state monitors
    D. Reduced staff workload

Section 11.2: Open-Ended Questions

1. Describe how the statewide data system supports real-time workflow oversight for Program Managers. Provide at least three examples.

2. Explain why consistent data entry is essential for compliance, monitoring, and production forecasting.

3. Identify three types of system alerts that help Program Managers catch issues early and explain why they matter.

4. Describe how system reports can be used to evaluate staff performance and workload balance.

5. Explain how the statewide system helps Program Managers prevent bottlenecks and maintain steady production.

Section 11.3: Deep-Dive Simulation Scenario

Simulation: “The Data Integrity Breakdown”

Your statewide data system dashboard is showing multiple alerts:

- Several jobs have missing blower door test results
- A number of work orders were uploaded without funding allocations
- Installation photos are missing or mislabeled
- Two QCI reports were never uploaded
- Audit files show inconsistencies between notes and diagnostic inputs
- Staff workloads appear unbalanced (one auditor overloaded, one under-assigned)
- Fiscal staff report cost allocation mismatches in the system

1. Identify at least five major data issues in this situation and explain why each poses a compliance or workflow risk.

2. Outline a data-quality restoration plan that includes:
   - Staff retraining
   - New internal data-quality checks
   - Dashboard monitoring routines
   - Workload rebalancing
   - Improved documentation expectations

3. Create a “Data Integrity Checklist” (8–12 items) that your team must complete for every job before it moves to closeout.

4. Describe how you will use statewide system reports and dashboards to identify trends, training needs, or process gaps. Provide examples.

CHAPTER 12 WORKBOOK: Training and Staff Development

Section 12.1: Multiple-Choice Questions

1. Weatherization staff must maintain current certifications such as:
   A. Real estate licensure
   B. BPI Building Analyst, QCI, RRP, and OSHA training
   C. Lead abatement contractor licensure only
   D. No certifications are required

2. Tracking training requirements is important because:
   A. Certifications can lapse, creating compliance risks
   B. Training records are optional
   C. Fiscal staff prefer extra paperwork
   D. Weatherization standards rarely change

3. Continuing education ensures staff:
   A. Perform work faster regardless of safety
   B. Stay current with evolving standards, diagnostic methods, and DOE guidance
   C. Do not need to follow SOPs
   D. Can skip required documentation

4. A strong staff development culture includes:
   A. Avoiding feedback to prevent conflict
   B. Supporting staff through coaching, growth opportunities, and mentoring
   C. Allowing contractors to manage staff training
   D. Only training new employees

5. Performance issues should be addressed through:
   A. Immediate reassignment without explanation
   B. Clear feedback, retraining, and support
   C. Avoiding confrontation
   D. Allowing staff to self-correct without guidance

6. Cross-training staff can help by:
   A. Increasing deferrals
   B. Strengthening agency capacity and flexibility
   C. Reducing documentation quality
   D. Eliminating the need for auditors

7. Contractors must receive training on:
   A. DOE and state standards, installation expectations, and safety requirements
   B. Only fiscal processes
   C. Client income eligibility forms
   D. Only local building codes

8. The Program Manager ensures staff training records are:
   A. Discarded annually
   B. Stored, updated, and checked regularly
   C. Only kept during monitoring
   D. Only required for contractors

9. The statewide system and SOPs support training by:
   A. Serving as reference materials and reinforcing consistent expectations
   B. Eliminating the need for communication
   C. Replacing hands-on practice
   D. Providing entertainment

10. A Program Manager promotes a culture of quality by:
    A. Ignoring recurring errors
    B. Recognizing strong work, reinforcing standards, and providing supportive coaching
    C. Limiting staff questions
    D. Delegating all training to fiscal staff

Section 12.2: Open-Ended Questions

1. List three required certifications for weatherization staff and explain why each is important.

2. Explain how a Program Manager can track, maintain, and monitor staff training records effectively.

3. Describe how continuing education helps your agency maintain high standards of quality and compliance.

4. How can cross-training staff strengthen program capacity and reduce production slowdowns?

5. In your own words, describe the Program Manager's role in fostering a positive training and development culture.

Section 12.3: Deep-Dive Simulation Scenario

Simulation: “The Training Gaps”

During a process review, you discover:

- One auditor’s BPI certification expired two months ago
- A contractor is missing lead-safe (RRP) certification
- Two crew members have outdated OSHA training
- Modelers are not updated on recent statewide software changes
- Several QCI failures point to installation technique issues
- Staff report confusion about new ventilation standards
- Training documentation logs are incomplete in the statewide system

1. Identify at least five major training and credential issues in this scenario. Explain why each creates compliance, safety, or workflow risks.

2. Outline an immediate 30-day training stabilization plan, including:
    - Certification renewals
    - Contractor compliance
    - Staff retraining needs
    - Documentation updates
    - Temporary workflow adjustments

3. Develop a “Training Compliance Checklist” (8–12 items) to ensure all staff and contractors maintain required credentials.

4. Describe how you would create an ongoing professional development system that supports continuous learning and performance improvement.

CHAPTER 13 WORKBOOK: Quality Assurance and Program Monitoring

Section 13.1: Multiple-Choice Questions

1. The purpose of internal monitoring is to:
   A. Replace state monitoring
   B. Identify and correct issues before state or federal reviews
   C. Reduce the need for documentation
   D. Allow contractors to self-evaluate

2. Field quality reviews are used to:
   A. Verify installation quality, safety, and adherence to work orders
   B. Reduce the number of audits
   C. Replace the need for QCI
   D. Eliminate change orders

3. Desk reviews focus on:
   A. Reviewing photos, documentation, modeling files, and consistency in records
   B. Inspecting mechanical systems in the home
   C. Conducting blower door testing
   D. Interviewing clients about customer service

4. A Corrective Action Plan (CAP) should:
   A. Punish staff
   B. Clarify the root cause, outline steps for correction, assign responsibilities, and set timelines
   C. Replace SOPs
   D. Be optional unless state monitoring requests it

5. Preparing for state or federal monitoring requires:
   A. Ensuring all files are fully documented, organized, consistent, and compliant
   B. Minimal effort
   C. Only reviewing intake files
   D. Waiting for monitors to find issues

6. Trends in QCI outcomes, internal reviews, and system data should be used to:
   A. Criticize contractors
   B. Identify training needs and improve processes
   C. Justify skipping documentation
   D. Delay production

7. Internal monitoring should mirror:
   A. Local contractor preferences
   B. State and federal monitoring structures
   C. Only installation requirements
   D. Fiscal rules exclusively

8. Quality assurance is best described as:
   A. A one-time process
   B. A continuous cycle of evaluation, feedback, documentation, and improvement
   C. A task only for QCIs
   D. Optional for high-performing agencies

9. A Program Manager must track deficiencies to:
   A. Assign blame
   B. Identify patterns and take corrective action
   C. Reduce staff involvement
   D. Avoid state communication

10. Strong QA practices help:
    A. Reduce production
    B. Increase monitoring findings
    C. Protect funding, improve production flow, and strengthen client outcomes
    D. Decrease documentation accuracy

Section 13.2: Open-Ended Questions

1. Explain why QA (quality assurance) is described as a continuous cycle. What does this mean for daily program operations?

2. Describe the difference between field quality reviews and desk reviews. Why are both necessary?

3. List three things that should be reviewed during internal monitoring and explain why each is important.

4. What are the essential components of a Corrective Action Plan (CAP), and how does each component support program improvement?

5. In your own words, describe how QA and monitoring support long-term program performance and client impact.

Section 13.3: Deep-Dive Simulation Scenario
Simulation: “Preparing for State Monitoring”

Your agency receives notice that the state will conduct a full monitoring review in six weeks. A preliminary internal audit reveals:

- Missing photos in multiple installation files
- Modeling files that do not match work orders
- H&S documentation missing justification text
- QCI reports with incomplete diagnostic results
- Several unresolved corrective actions from a prior monitoring visit
- Staff report unclear internal review expectations
- SOPs have not been updated to reflect new ventilation rules

1. Identify at least five major risks that could lead to monitoring findings. Explain why each is a serious concern.

2. Outline a six-week monitoring preparation plan that includes:
   - File clean-up
   - Documentation checks
   - Staff training
   - SOP updates
   - Internal monitoring routines
   - Contractor communication

3. Develop a “Monitoring Readiness Checklist” (8–12 items) your agency will complete before the state arrives.

4. Describe how you will build a long-term QA culture that minimizes future monitoring findings. Include staff development, internal audits, and communication strategies.

CHAPTER 14 WORKBOOK: Policy Management

Section 14.1: Multiple-Choice Questions

- Policy management is essential because:
  A. Policies are optional guidelines
  B. Policies govern every part of weatherization, from intake to installation to closeout
  C. Policies only apply to auditors
  D. Policies are only important during monitoring

2. A Program Manager must understand:
   A. Only local agency SOPs
   B. DOE WAP rules, Michigan's State Plan, LIHEAP rules, H&S requirements, ASHRAE ventilation standards, BPI standards, and OSHA requirements
   C. Contractor insurance rules only
   D. Building codes exclusively

3. When policies change, the Program Manager must:
   A. Wait for contractors to figure it out
   B. Communicate updates clearly, adjust SOPs, and train staff
   C. Only notify auditors
   D. Ignore the change unless DOE provides a written warning

4. SOPs (Standard Operating Procedures) should:
   A. Be updated only every five years
   B. Translate statewide and federal policies into local, step-by-step procedures
   C. Be optional for experienced staff
   D. Replace all policy requirements

5. Documenting policy interpretations helps Program Managers:
   A. Reduce consistency across staff
   B. Ensure decisions are defensible, consistent, and monitoring-ready
   C. Avoid updating SOPs
   D. Restrict communication with contractors

6. Inconsistent application of funding rules may lead to:
   A. More flexibility for installers
   B. Disallowed costs and monitoring findings
   C. Faster job flow
   D. Increased QCI pass rates

7. Policy training for staff and contractors must:
   A. Be ongoing and updated when new rules are issued
   B. Be completed only once during onboarding
   C. Focus only on intake procedures
   D. Be optional if staff feel confident

8. Strong policy management supports:
   A. Reduced compliance
   B. Consistent workflows, fewer monitoring findings, and clearer decisions
   C. Eliminating documentation requirements
   D. Letting contractors choose their own standards

9. Program Managers must coordinate policy implementation across:
   A. Only modelers
   B. Intake, auditors, modelers, installers, QCIs, fiscal teams, and contractors
   C. The state office only
   D. Only clients

10. Strong policy management reduces:
    A. Accountability
    B. Documentation accuracy
    C. Errors, inconsistencies, and risks during monitoring
    D. Client satisfaction

Section 14.2: Open-Ended Questions

1. Describe why it is essential for a Program Manager to understand DOE, LIHEAP, state H&S rules, ASHRAE standards, and BPI requirements.

2. Explain how clear policy communication prevents inconsistencies within the weatherization workflow. Provide at least two examples.

3. What role do SOPs play in ensuring compliance and staff consistency? How should they be maintained?

4. Describe why documenting policy interpretations is important. How does this support program monitoring and internal consistency?

5. Identify three ways a Program Manager can ensure contractors correctly follow policy requirements and program rules.

Section 14.3: Deep-Dive Simulation Scenario

Simulation: “Policy Breakdown at the Agency”

You discover during a monitoring preparation review that:

- Staff have been applying a ventilation standard that was updated 6 months ago
- Contractors are using outdated lead-safe procedures
- SOPs have not been revised since last program year
- A new state H&S rule was never communicated to installers
- Cost allocation rules for LIHEAP vs. DOE are being inconsistently applied
- Staff report they are unsure which version of the State Plan they should reference
- Several policy questions were answered verbally but never documented

1. Identify at least five major policy-related risks in this scenario. Explain why each threatens compliance or workflow quality.

2. Outline a comprehensive policy stabilization plan including:
    - Updating SOPs
    - Formal communication procedures
    - Centralized documentation
    - Staff and contractor training
    - Funding rule clarification
    - Coordination with the state

3. Create a “Policy Communication Protocol” (8–12 items) to ensure all staff and contractors receive and implement new policy updates consistently.

4. Describe how a Program Manager can create a long-term culture of policy awareness and compliance within the agency. Provide specific leadership strategies.

CHAPTER 15 WORKBOOK: Health and Safety Requirements

Section 15.1: Multiple-Choice Questions

1. Health and safety (H&S) standards in weatherization must follow:
   A. Only local building codes
   B. DOE H&S rules, Michigan's State Plan, BPI protocols, ASHRAE, OSHA, and federal/state safety requirements
   C. Contractor personal judgment
   D. Only ventilation manufacturer guidelines

2. Which of the following is not a common health and safety hazard identified in weatherization?
   A. Mold and moisture
   B. CO hazards or gas leaks
   C. Knob-and-tube wiring
   D. Freshly painted walls

3. If a hazard threatens worker or client safety, the Program Manager must ensure:
   A. Work continues to meet timelines
   B. Work pauses until risks are assessed and documented
   C. Contractors decide individually what to do
   D. The client provides their own PPE

4. Deferrals occur when:
   A. The client refuses to sign the intake form
   B. A home has hazards that make weatherization unsafe or impossible until corrected
   C. The agency is over budget
   D. The contractor is delayed

5. Health and safety measures must be:
   A. Installed without documentation
   B. Justified clearly with notes, photos, diagnostics, and funding alignment
   C. Added at contractor discretion
   D. Funded only with DOE funds

6. A Program Manager's H&S responsibilities include:
   A. Ensuring hazards are documented early, addressed correctly, and communicated clearly
   B. Skipping H&S steps if production is behind
   C. Allowing installers to make undocumented changes
   D. Only reviewing H&S issues during closeout

7. The Deferral Reduction Strategy helps the agency by:
   A. Increasing the number of unsafe homes
   B. Reducing preventable deferrals through early hazard identification and mitigation
   C. Eliminating H&S documentation
   D. Avoiding communication with clients

8. When crews find new hazards during installation, they must:
   A. Fix the hazards without reporting
   B. Stop work and report the issue promptly for documentation and decision-making
   C. Wait until QCI
   D. Let the client fix it

9. Clients must be informed of H&S issues:
   A. Only at closeout
   B. Using clear, documented communication and required state/DOE forms
   C. Only if they ask about hazards
   D. At the end of the program year

10. A well-managed H&S process improves:
    A. Worker risk and client confusion
    B. Safety, compliance, production flow, and client satisfaction
    C. Monitoring findings
    D. Unnecessary deferrals

Section 15.2: Open-Ended Questions

1. Explain why early identification of health and safety issues is critical for program success and deferral reduction.

2. Describe at least three major categories of H&S hazards and how each impacts weatherization eligibility or workflow.

3. How should Program Managers ensure staff and contractors consistently follow safety protocols in attics, crawlspaces, and mechanical areas?

4. Describe how client communication should be handled when serious health and safety hazards are identified. What information must be documented?

5. Explain the importance of clear documentation for H&S measures, including justification, photos, and diagnostic results.

Section 15.3: Deep-Dive Simulation Scenario

Simulation: “A Hazard-Heavy Home”

Your auditor reports that a client's home has multiple issues:

- Suspected asbestos around heating ducts
- Mold behind basement drywall
- A failed worst-case depressurization test
- Damaged wiring in the attic
- A disconnected dryer vent causing moisture buildup
- Significant clutter blocking access areas
- The client is upset after hearing the word “deferral”

1. Identify at least five major health and safety hazards and explain which must be corrected before weatherization can proceed.

2. Outline the step-by-step process you would follow as Program Manager, including:
   - Documentation
   - Communication with the client
   - Coordination with the Deferral Reduction Specialist
   - Funding source considerations
   - Determining whether a deferral is required

3. Develop a “Health & Safety Documentation Checklist” (8–12 items) to ensure hazards are properly recorded and justified.

4. Draft a brief explanation you would provide to the client to help them understand the issues, next steps, and how the program intends to support resolution whenever possible.

CHAPTER 16 WORKBOOK: Contractor and Vendor Oversight
Section 16.1: Multiple-Choice Questions

1. Contractor procurement must follow:
   A. Contractor preferences
   B. Verbal agreements with installers
   C. Federal, state, and agency procurement rules
   D. PM discretion based on workload

2. Proper procurement documentation must include:
   A. Verbal approvals from auditors
   B. Quotes, bids, or proposals
   C. Contractor text messages
   D. Photos of previous installations

3. Contractor onboarding should always include:
   A. Allowing contractors to set their own installation standards
   B. Training on the statewide data system and documentation requirements
   C. Providing contractors with full access to the agency's fiscal accounts
   D. Bypassing RRP requirements if contractors have experience

4. A key factor when evaluating contractor performance is:
   A. How many homes the contractor owns
   B. QCI pass/fail rates and documentation quality
   C. Whether the contractor prefers certain neighborhoods
   D. Whether clients request them by name

5. Corrective action plans should be used when:
   A. A contractor exceeds production goals
   B. Contractors request fewer work orders
   C. Deficiencies appear that affect quality, safety, or compliance
   D. Fiscal staff recommend switching contractors

6. A contract may need to be terminated when:
   A. Contractor performance consistently fails to improve
   B. Contractors ask for training
   C. PM workload becomes too high
   D. Contractors complete work too quickly

7. Contractor compliance requirements include:
   A. Following only local building codes
   B. Maintaining insurance, licensing, certifications, and wage compliance
   C. Providing their own payment schedules
   D. Choosing which OSHA rules to follow

8. Vendor oversight includes ensuring:
   A. Vendors provide only the cheapest materials
   B. Only one vendor is used to simplify tracking
   C. Materials meet program specifications and tools meet calibration requirements
   D. Vendors deliver materials without paperwork

9. Strong contractor relationships are built by:
   A. Avoiding feedback unless problems occur
   B. Providing clear expectations and recognizing high-quality work
   C. Allowing contractors to define their own safety practices
   D. Letting contractors communicate directly with fiscal staff only

10. Strong contractor oversight results in:
    A. Increased change orders and inconsistent work
    B. Higher quality installations and stronger compliance
    C. Fewer communication pathways
    D. Reduced accountability

Section 16.2: Open-Ended Questions

1. Describe why procurement compliance is essential for contractor oversight and agency protection.

2. What key components should be included in a strong contractor onboarding process? Provide at least four examples.

3. Identify three performance indicators that Program Managers should monitor to evaluate contractor quality and consistency.

4. Explain why proper documentation of contractor violations and corrective actions is critical for monitoring and procurement reviews.

5. Describe how effective vendor oversight helps support timely production and installation quality.

Section 16.3: Deep-Dive Simulation Scenario

Simulation: “The Underperforming Contractor”

You oversee three contractors. Over the last quarter:

- Contractor A has a rising number of QCI failures
- Contractor B frequently submits incomplete documentation
- Contractor C is consistently late delivering materials and often blames vendors
- All three contractors have increases in change-order requests
- Vendor delivery delays have caused job standstills
- One contractor's insurance expired last month and no renewal documentation was submitted

1. Identify at least five major risks from this scenario and explain how each threatens quality, compliance, or production.

2. Outline a corrective action plan for each contractor, including documentation needed, training, and communication steps.

3. Describe how you would address vendor-related issues contributing to installation delays.

4. Explain what procurement or compliance steps must be taken regarding the contractor with expired insurance.

5. Develop a Contractor Performance Review Checklist (6–10 items) that your agency could use quarterly.

CHAPTER 17 WORKBOOK: Financial Management

Section 17.1: Multiple-Choice Questions

1. Program Managers are responsible for:
   A. Only the technical side of weatherization
   B. Tracking budgets, monitoring spending, and ensuring funds are used correctly
   C. Performing fiscal audits directly
   D. Eliminating the need for fiscal oversight

2. Underspending on grants can result in:
   A. Additional future funding
   B. A risk of losing future allocations
   C. Contractors receiving bonuses
   D. Reduced documentation requirements

3. Correct allocation of costs across funding streams is required because:
   A. Funding sources have specific allowable uses and documentation standards
   B. All measures must be billed to DOE
   C. Contractors determine funding based on convenience
   D. Allocation only matters during audits

4. Prior to reimbursement, Program Managers must ensure:
   A. All costs match installation documentation and approved scopes
   B. Crews have signed off on future work
   C. Clients agree with the agency budget
   D. Fiscal staff add any missing items themselves

5. Disallowed costs occur when:
   A. Costs are fully documented and allowable
   B. Measures are incorrectly allocated or unsupported
   C. Fiscal and program staff communicate regularly
   D. Spending aligns perfectly with production

6. Strong fiscal coordination helps ensure:
   A. Invoices are processed late
   B. Spending aligns with production and timelines
   C. Contractors receive flexible funding allocations
   D. Staff can skip documentation

7. Budget forecasting helps Program Managers:
   A. Reduce the need for scheduling
   B. Predict production demands and adjust staffing and contractor loads
   C. Eliminate reporting requirements
   D. Avoid monitoring

8. Reimbursement delays are often caused by:
   A. Complete, clean files
   B. Missing closeout documentation or cost allocation errors
   C. Strong coordination with fiscal staff
   D. Advanced contractor communication

9. Financial monitoring reviews look for:
   A. Whether the agency followed allowable cost rules and has supporting documentation
   B. Contractor preferences
   C. How many staff meetings are held
   D. The number of client complaints

10. A Program Manager protects the agency financially by:
   A. Delegating all oversight to contractors
   B. Ensuring proper documentation, allocations, and compliance across all jobs
   C. Ignoring cost overruns
   D. Avoiding coordination with fiscal staff

Section 17.2: Open-Ended Questions

1. Explain why strong financial management is essential to the long-term sustainability of a weatherization program.

2. Describe the relationship between production schedules, job flow, and budget forecasting. How do they influence one another?

3. Identify three examples of misallocated or unsupported costs and explain how each could create a monitoring finding.

4. What steps should Program Managers and fiscal staff take together to ensure accurate reimbursement submissions?

5. Describe how internal financial controls (documentation reviews, allocation checks, invoice verification) protect the agency.

Section 17.3: Deep-Dive Simulation Scenario

Simulation: “The Funding Gap Crisis”

It is mid-year, and your financial reports show alarming trends:

- DOE funds are underspent
- LIHEAP funds are nearly exhausted
- H&S expenditures are rising rapidly
- Several contractor invoices include items not reflected in work scopes
- A batch of closeout files was returned by fiscal due to allocation errors
- Production has slowed due to audit backlogs
- A state monitoring visit is scheduled in three months

1. Identify at least five financial risks in this scenario. Explain why each threatens compliance, production, or funding.

2. Outline an immediate financial stabilization plan that includes:
   A. Rebalancing funding use
   B. Reviewing allocations
   C. Contractor invoice verification
   D. Production adjustments
   E. Coordination with fiscal
   F. Preventing future errors

3. Create a “Financial Compliance Checklist” (8–12 items) to ensure that each job meets all financial requirements before reimbursement.

4. Describe how you would realign production, staffing, and scheduling to correct the underspending and overspending trends across different funding streams.

CHAPTER 18 WORKBOOK: Program Planning & Performance Management

Section 18.1: Multiple-Choice Questions

1. Annual program planning requires Program Managers to:
   A. Only set financial goals
   B. Review historical production trends, plan workloads, and anticipate seasonal or staffing impacts
   C. Wait for the state to assign goals
   D. Plan jobs only one month at a time

2. Strong performance management includes:
   A. Ignoring production data
   B. Regularly monitoring job flow, capacity, and performance metrics
   C. Allowing contractors to self-schedule work
   D. Reducing documentation requirements

3. Production forecasting helps Program Managers:
   A. Avoid QCI inspections
   B. Anticipate resource needs, adjust staffing, and maintain job flow
   C. Reduce intake to limit work
   D. Replace internal QA requirements

4. A key component of performance management is:
   A. Eliminating communication between teams
   B. Reviewing trends such as deferrals, QCI failures, H&S spending, and contractor performance
   C. Allowing work orders to remain flexible and unreviewed
   D. Reducing internal monitoring

5. End-of-year production backlogs often occur due to:
   A. Over-staffing
   B. Poor mid-year monitoring and uneven job flow
   C. Too many QCIs
   D. Excessive client interaction

6. Continuous improvement includes:
   A. Waiting for problems to be identified during state monitoring
   B. Reviewing performance metrics routinely and adjusting processes accordingly
   C. Avoiding feedback cycles
   D. Only training new staff

7. Performance reports to leadership must:
   A. Exclude challenges or risks
   B. Provide clear production, spending, staffing, and compliance updates
   C. Contain only intake information
   D. Include only positive results

8. A major barrier to meeting production goals can be:
   A. Strong communication
   B. Workflow bottlenecks and uneven staff capacity
   C. Consistent documentation
   D. Regular internal audits

9. Strong planning and performance management help:
   A. Reduce the number of homes served
   B. Improve compliance, job flow, capacity, and statewide outcomes
   C. Increase deferrals
   D. Lower communication quality

10. A Program Manager strengthens team engagement by:
    A. Providing feedback, celebrating successes, and offering growth opportunities
    B. Limiting communication
    C. Assigning roles without explanation
    D. Avoiding staff questions

Section 18.2: Open-Ended Questions

1. Describe how annual planning supports steady production and strong financial performance throughout the year.

2. Explain how Program Managers use data to forecast job flow and identify capacity gaps. Provide examples.

3. List at least three performance metrics a Program Manager should review regularly and explain why each matters.

4. Describe how production, staffing, and spending must stay aligned to meet statewide goals.

5. How can Program Managers promote continuous improvement across their team? Provide at least three strategies.

Section 18.3: Deep-Dive Simulation Scenario

Simulation: “The Mid-Year Course Correction”

It is July, and your dashboard shows:

- Production is behind schedule
- Spending on DOE and LIHEAP is uneven
- H&S spending is trending high
- Audit backlogs are increasing
- Two contractors are over-assigned while one is under-utilized
- Staff report unclear priorities
- Leadership wants an updated plan within two weeks

1. Identify at least five performance or planning problems represented in this scenario. Explain how each affects program outcomes.

2. Outline your two-week course-correction plan including:
   - Production realignment
   - Workload balancing
   - Spending adjustments
   - Communication with leadership
   - Staff coordination
   - Data review routines

3. Develop a “Monthly Performance Monitoring Checklist” (8–12 items) to keep the program on track year-round.

4. Describe how you will maintain staff engagement and reduce burnout while improving production and compliance.

CHAPTER 19: New Statewide System: Weatherization Program Management Module

Section 19.1: Multiple-Choice Questions

1. What is the primary purpose of the new Weatherization Program Management Module?
   A. To replace all client enrollment tools
   B. To unify and streamline the entire Weatherization Assistance Program workflow
   C. To eliminate the need for audits and inspections
   D. To track only contractor assignments

2. Which section of the module contains the workflow for each job from intake through closeout?
   A. Weatherization Dashboard
   B. Supporting Sections
   C. Job Management Section
   D. WAWeb Interface

3. Which two fields control the timing of each stage in the workflow?
   A. Assigned Contractor and Start Time
   B. Scheduled Date and Completed Date
   C. Income Verification and Utilities
   D. Review Date and Approval Date

4. The Custom Enrollment Status Summary (breadcrumb table) shows:
   A. Only the current job stage
   B. Job stages in chronological order
   C. Contractor payment history
   D. Only completed stages

5. What does uploading the WAWeb JSON file enable?
   A. Automatic filing of invoices
   B. Manual upload and automatic import of audit data, test results, and modeled measures
   C. Automatic scheduling of inspections
   D. Automatic client eligibility approval

6. In the Work Order Developed stage, which documents are required?
   A. Client demographic reports
   B. Utility bills and landlord forms
   C. WAWeb Input Report and Recommended Measures Report
   D. Weatherization Training Certificates

7. Which stage is used when the household must fix issues before weatherization can proceed?
   A. Deferred – Client Responsibility
   B. Deferred – Walk Away
   C. Callback
   D. Ineligible
   E.
8. Which stage documents the final inspection results?
   A. SHPO
   B. Final Closeout
   C. QCI
   D. Audit Review

9. What triggers manager alerts on the dashboard?
   A. Overdue tasks, missing documentation, certification issues
   B. Weather updates
   C. Staff time-off requests
   D. Contractor marketing materials

10. What allows a job to move from one stage to the next?
    A. Completing required fields and selecting the next status in the Custom Enrollment Status dropdown
    B. Closing the browser tab
    C. Uploading optional documents
    D. Verbal approval by a contractor

Section 19.2: Open-Ended Questions

1. Explain how defined fields and custom fields differ, and describe the role each plays in job progression.

2. Why is the Scheduled Date required when first entering a stage, and why must the Completed Date be entered before advancing?

3. Describe the purpose of the Custom Enrollment Status Summary. How can new staff use this screen to troubleshoot workflow issues?

4. List at least three responsibilities program managers have during Work Order Processing and explain why each is important.

5. How does the integration of the WAWeb JSON file improve accuracy and efficiency in job management?

6. Explain the difference between “Deferred – Walk Away” and “Deferred – Client Responsibility.”

7. Describe how the Weatherization Dashboard helps managers identify stalled jobs and production issues.

8. Why is assigning measures to the correct contractor type (shell, mechanical, specialized) important for scheduling and compliance?

9. In your own words, summarize how this module supports compliance with state and federal weatherization rules.

10. Explain why data quality checks and required fields are essential for accurate reporting.

Section 19.3: Deep-Dive Simulation Scenario

Scenario 1: Intake and Job Creation

You are an intake staff member. A client has submitted income documents and utility information. You have completed the House Information and validated the address.

Describe the steps you must take to officially activate the Weatherization Program enrollment and begin the job. What required information must be entered?

Scenario 2: Breadcrumb Troubleshooting

As a program manager, you notice a job showing “Energy Audit Review” as the current stage, but the Energy Audit stage has no Completed Date.

Explain what this indicates, how it might affect workflow, and what corrective steps you should take.

Scenario 3: Work Order Development

You have uploaded the WAWeb JSON file, but when you try to move the stage forward, the system will not save.

Identify at least three possible causes connected to required fields or missing documentation, and describe how to resolve them.

Scenario 4: Contractor Assignment

During Work Order processing, you realize that several shell measures were incorrectly assigned to a mechanical contractor.

Describe how this affects scheduling, documentation, and QCI verification. What steps must be taken to correct the issue?

Scenario 5: QCI and Callback

A QCI inspection results in a failed item requiring contractor correction.

Describe the workflow steps for entering the Callback stage, what data must be documented, and how you return the job to QCI afterward.

Scenario 6: Dashboards and Alerts

You are reviewing the Weatherization Dashboard and notice several jobs flagged for overdue documentation and pending approvals.

Explain how these alerts should influence your immediate priorities as a manager and how you would follow up with staff.

Scenario 7: Deferral Decision-Making

During an audit, a major electrical hazard is discovered that the program cannot address.

Determine whether this should result in “Deferred – Walk Away” or “Deferred – Client Responsibility.”

Describe the required documentation and the path forward in each case.

Scenario 8: Performance Monitoring

Your agency’s quarterly reports show slower-than-expected production.

Using the tools described in Chapter 19, explain how you would investigate which stages are creating delays and what data sources would guide your decisions.

FINAL NOTES and TAKEAWAYS