

S2: ALL AGENCIES PROGRAM INFORMATION SURVEY

This data is being collected to conduct a process evaluation of the Weatherization Assistance Program at the local level. The data you supply will be used to characterize the program in Program Year 2010, unless otherwise noted.

Public reporting burden for this collection of information is estimated to average eight 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 (XXXX-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 (XXXX-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 2010 unless otherwise noted.

Part 1. General Information

1. Please identify your state. _____
2. Please identify your local agency. _____
3. Which of the following best characterizes your agency? (Please check the one answer that best applies):
 Local Non-Profit Organization
 Local Government Agency
 County Government Agency
 Indian Tribe
 Other entity not eligible for CSBG funding
 Other (please specify) _____
4. For how many years had the current director of your local Weatherization Program served in that capacity prior to PY 2010? _____
5. What agency, office, or department was responsible for reviewing the performance of your local Weatherization Program in PY 2010? _____

6. How many layers of management or supervision were there between your weatherization crews and the director of your local Weatherization Program in PY 2010? _____ [If your weatherization crews reported directly to the Program director, the answer should be 0.]

7. Please indicate other energy-related, housing, and other programs that cooperated with your agency's weatherization program, by source of funding in PY 2010. Please check all that apply.

Type of Program	Federal Funding	State Funding	Utility Funding	Other Funding
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Energy bill paying assistance

Housing re-habilitation

Home emergency repairs

**Hardship funds (other than
for energy bill paying)**

Fuel delivery in crisis

Fair housing

Health and safety

**Energy education (other than
client education delivered by
weatherization program)**

Home buying education

Rehabilitation loan

Mortgage loan

Emergency food

Emergency safety

Other (please specify)

Other (please specify)

Other (please specify)

Other (please specify)

Other (please specify)

Other (please specify)

Part 2. Leveraging

1. Please list weatherization funding received during PY 2010 by completing the table below.

Column A lists potential sources of weatherization funding. As a reference, Column B lists the amount of PY 2008 funding reported by your agency in the retrospective evaluation S2 survey. If the PY 2008 funding amount is incorrect, please list the correct amount in Column B. In Column C, please indicate whether your agency received funding from each source in PY 2010. In Column D, enter the total funding amount received in PY 2010 from each source received. Please allocate the total funding amount listed in Column D to the sub-categories listed in Columns E through G.

A	B	C	D	E	F	G
Funding source	Funds received from this source in PY 2008	Did agency receive weatherization funds from this source in PY 2010?	Total funds received from this source in PY 2010	Funding for program operations ²	Funding for administration/program management	Funding for training and technical assistance (T&TA)
DOE ¹	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>	← Selecting	no will gray	columns to	right
LIHEAP	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>	← Selecting	yes will drive	skip patterns	in Q12-23
Petroleum Violation Escrow (PVE)	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>				
Other Federal Programs	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>				
State Public Benefit Funds	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>				
Other State Programs	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>				
Utilities	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>				
Program Income	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>				
In-Kind	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>				
Non-Profits	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>				
Third Party (e.g., Foundations, Lenders)	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>				
All other (Please specify)	Pre-populated	Yes <input type="checkbox"/> No <input type="checkbox"/>				
TOTAL	Pre-populated					
<ol style="list-style-type: none"> 1. Include WAP and ARRA funds in this row. 2. List all funding for weatherization program operations that was passed on to subgrantees, including amounts spent on measures, labor, health and safety, financial audits, liability insurance, vehicles and equipment. 						

2. Of the Program Year 2010 funds retained by your Agency's Weatherization Program for Program Management (see Column F total in Question 1), 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.

3. Did your agency classify its expenditures for client intake, audits, and post-weatherization inspections as program management costs or as allowable costs used in the calculation of average cost per unit in PY 2010? Please indicate your answer for each type of expenditure by checking the appropriate cell in the table below.

Type of Expenditure	Classified as Program Management Costs?	Classified as Allowable Costs for Purpose of Calculating Average Cost per Unit?
Expenditures for Client Intake		
Expenditures for Audits		
Expenditures for Post-Weatherization Quality Control Inspections		

4. Of the TOTAL amount spent by your agency in Program Year 2010 using funds from *all* sources (see Column D total in Question 1), please give your best estimate of how much was spent on Audits and Inspections. \$_____

5. Please divide your agency's Program Year 2010 expenditures on program operations (see Column E total in Question 1) into in-house expenditures and contractor expenditures, as shown in the following table.

Type of Expenditure	PY 2010 In-house Expenditures (in \$)	PY 2010 Contractor Expenditures (in \$)	PY 2010 Total Expenditures on program operations (in \$)
Expenditures for Health and Safety, Repairs, and Other Non Cost-Effective Measures			
All Expenditures Defined as Allowable Costs for Purpose of Calculating Average Cost per Unit			
TOTAL FUNDS			

6. Of your agency's total Program Year 2010 expenditures on program operations (see Column E total in Question 1), please give your best estimate of how much was for labor, how much for materials, and how much for other expenses.

Type of Expenditure	PY 2010 Expenditures on program operations (in \$)
Labor	
Materials	
Other Expenses (e.g., costs for vehicles, transportation, maintenance, and storage)	
TOTAL FUNDS	

7. Please provide the following information about ALL low-income dwelling units weatherized by your agency in Program Year 2010.

Type of Unit Weatherized	Number of Units Weatherized in PY 2010			TOTAL Units
	DOE Units ¹	Non-DOE Units ²		
		Comprehensive Weatherization ³	Non-comprehensive Weatherization ⁴	
Single Family Attached and Detached				
Small Multi-family (2-4 units)				
Multifamily (5 or More Units per Building)				
Mobile Home				
Shelter				
TOTAL UNITS				

¹ These are dwelling units that your agency weatherized and reported to the State as “DOE Units”
² These are dwelling units that your agency weatherized but did not report as “DOE Units”
³ Comprehensive weatherization units are those for which an audit or priority list was used that addressed a large proportion of potential energy-saving measures.
⁴ Non-comprehensive weatherization units are those for which a limited set of measures was considered (e.g., baseload electric measures only; low cost/no cost measures only), reflecting the needs and priorities of the funding entity.

8. Of all the DOE units weatherized by your agency in Program Year 2010, how many used each of the following as their main heating fuel (i.e., the fuel providing most of the heat for the dwelling unit) in the winter prior to weatherization?

- Natural gas _____
- Fuel oil _____
- Electricity _____
- Propane/LPG _____
- Kerosene or coal oil _____
- Wood _____
- Other (please specify) _____

9. Of all the DOE units weatherized by your agency in Program Year 2010, how many housed members of the following high-priority client populations (leave blank if do not know)?

- Children (according to your state’s definition of that term) _____
- Elderly (age 60 and older) _____
- Disabled _____
- Native American _____

10. Did your state have official definitions of “high energy expenditure” or “high energy burden” in PY 2010?

- Yes _____
 No _____

11. Of all the DOE units weatherized by your agency in Program Year 2010, how many met your state's definition of having "high energy expenditures" _____ and "high energy burden" _____? (leave blank if do not know or if state did not have that definition)

[Q12 will be activated by 'yes' responses in the associated funding categories of Question 1 and skipped for any 'no' responses in those categories].

12. In the categories below, please specify the name of each funder and the total amount of weatherization funding received in PY 2010.

	Funding entity (please enter names)	Total weatherization funding administered in PY 2010 (please enter amounts)
Utilities		
Utility 1		
Utility 2		
Utility 3		
All other utilities		
In-kind contributions		
In-kind 1		
In-kind 2		
In-kind 3		
All other in-kind		
Nonprofits		
Nonprofit 1		
Nonprofit 2		
Nonprofit 3		
All other nonprofits		
Other		
Other 1		
Other 2		
Other 3		
All others		

[Q13 will be activated by 'yes' responses in the LIHEAP category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

13a. When did agency first receive weatherization funds from LIHEAP? _____

13b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

13c. Please describe the change in the leveraging relationship between your agency's low-income weatherization program and LIHEAP during the ARRA period.

- Extremely positive
- Positive
- No change
- Negative
- Extremely negative

13d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

- increase
- decrease
- stay the same

13e. If leveraged funding from LIHEAP decreased from PY 2008, was the change attributable to increased ARRA funding?

- Yes
- No
- Not applicable

13f. Did you require local agencies to follow DOE rules when spending weatherization funds from LIHEAP in PY 2010?

- Yes
- No

[13g will appear if respondent answered 'no' in 13f]

13g. What were the major differences in the rules governing the expenditure of LIHEAP funds in comparison to the rules governing the expenditure of DOE funds? _____

13h. Did your agency experience any delays or other difficulties in spending funds from LIHEAP in PY 2010?

- Yes
- No

If yes, please provide a short description of the reasons for the delays or other difficulties:

[Q14 will be activated by 'yes' responses in the PVE category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

14a. When did agency first receive weatherization funds from Petroleum Violation Escrow (PVE)? _____

14b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

14c. Please describe the change in leveraging relationships between your agency's low-income weatherization program and PVE during the ARRA period.

Extremely positive

Positive

No change

Negative

Extremely Negative

14d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

increase

decrease

stay the same

14e. If leveraged funding from PVE decreased from PY 2008, was the change attributable to increased ARRA funding?

Yes

No

Not applicable

14f. Did you require local agencies to follow DOE rules when spending weatherization funds from PVE in PY 2010?

Yes

No

[14g will appear if respondent answered 'no' in 14f]

14g. What were the major differences in the rules governing the expenditure of PVE funds in comparison to the rules governing the expenditure of DOE funds?

14h. Did your agency experience any delays or other difficulties in spending funds from PVE in PY 2010?

Yes

No

If yes, please provide a short description of the reasons for the delays or other difficulties:

[Q15 will be activated by 'yes' responses in the Other Federal Programs category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

15a. When did agency first receive weatherization funds from Other Federal Programs?

15b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

15c. Please describe the change in leveraging relationships between your agency's low-income weatherization program and Other Federal Programs during the ARRA period.

Extremely positive

Positive

No change

Negative

Extremely Negative

15d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

increase

decrease

stay the same

15e. If leveraged funding from Other Federal Programs decreased from PY 2008, was the change attributable to increased ARRA funding?

Yes

No

Not applicable

15f. Did you require local agencies to follow DOE rules when spending weatherization funds from Other Federal Programs in PY 2010?

Yes

No

[15g will appear if respondent answered 'no' in 15f]

15g. What were the major differences in the rules governing the expenditure of Other Federal Programs funds in comparison to the rules governing the expenditure of DOE funds? _____

15h. Did your agency experience any delays or other difficulties in spending funds from Other Federal Programs in PY 2010?

Yes

No

If yes, please provide a short description of the reasons for the delays or other difficulties:

[Q16 will be activated by 'yes' responses in the State Public Benefit Funds category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

16a. When did agency first receive weatherization funds from State Public Benefit Funds?

16b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

16c. Please describe the change in leveraging relationships between your agency's low-income weatherization program and State Public Benefit Funds during the ARRA period.

____ Extremely positive

____ Positive

____ No change

____ Negative

____ Extremely Negative

16d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

____ increase

____ decrease

____ stay the same

16e. If leveraged funding from State Public Benefit Funds decreased from PY 2008, was the change attributable to increased ARRA funding?

____ Yes

____ No

____ Not applicable

16f. Did you require local agencies to follow DOE rules when spending weatherization funds from State Public Benefit Funds in PY 2010?

____ Yes

____ No

[16g will appear if respondent answered 'no' in 16f]

16g. What were the major differences in the rules governing the expenditure of State Public Benefit Funds in comparison to the rules governing the expenditure of DOE funds? _____

16h. Did your agency experience any delays or other difficulties in spending funds from State Public Benefit Funds in PY 2010?

____ Yes

____ No

If yes, please provide a short description of the reasons for the delays or other difficulties:

[Q17 will be activated by 'yes' responses in the Other State Programs category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

17a. When did agency first receive weatherization funds from Other State Programs? _____

17b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

17c. Please describe the change in leveraging relationships between your agency's low-income weatherization program and Other State Programs during the ARRA period.

____ Extremely positive

____ Positive

____ No change

____ Negative

____ Extremely Negative

17d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

____ increase

____ decrease

____ stay the same

17e. If leveraged funding from Other State Programs decreased from PY 2008, was the change attributable to increased ARRA funding?

____ Yes

____ No

____ Not applicable

17f. Did you require local agencies to follow DOE rules when spending weatherization funds from Other State Programs in PY 2010?

____ Yes

____ No

[17g will appear if respondent answered 'no' in 17f]

17g. What were the major differences in the rules governing the expenditure of Other State Programs funds in comparison to the rules governing the expenditure of DOE funds?

17h. Did your agency experience any delays or other difficulties in spending funds from Other State Programs in PY 2010?

____ Yes

_____ No

If yes, please provide a short description of the reasons for the delays or other difficulties:

[Q18 will be activated by 'yes' responses in the Utilities category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

18a. When did agency first receive weatherization funds from Utilities? _____

18b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

18c. Please describe the change in leveraging relationships between your agency's low-income weatherization program and Utilities during the ARRA period.

_____ Extremely positive

_____ Positive

_____ No change

_____ Negative

_____ Extremely Negative

18d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

_____ increase

_____ decrease

_____ stay the same

18e. If leveraged funding from Utilities decreased from PY 2008, was the change attributable to increased ARRA funding?

_____ Yes

_____ No

_____ Not applicable

18f. Did you require local agencies to follow DOE rules when spending weatherization funds from Utilities in PY 2010?

_____ Yes

_____ No

[18g will appear if respondent answered 'no' in 18f]

18g. What were the major differences in the rules governing the expenditure of Utilities funds in comparison to the rules governing the expenditure of DOE funds?

18h. Did your agency experience any delays or other difficulties in spending funds from Utilities in PY 2010?

_____ Yes

No

If yes, please provide a short description of the reasons for the delays or other difficulties:

[Q19 will be activated by 'yes' responses in the Program Income category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

19a. When did agency first receive weatherization funds from Program Income? _____

19b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

19c. Please describe the change in leveraging relationships between your agency's low-income weatherization program and Program Income during the ARRA period.

Extremely positive

Positive

No change

Negative

Extremely Negative

19d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

increase

decrease

stay the same

19e. If leveraged funding from Program Income decreased from PY 2009, was the change attributable to increased ARRA funding?

Yes

No

Not applicable

19f. Did you require local agencies to follow DOE rules when spending weatherization funds from Program Income in PY 2010?

Yes

No

[19g will appear if respondent answered 'no' in 19f]

19g. What were the major differences in the rules governing the expenditure of Program Income funds in comparison to the rules governing the expenditure of DOE funds?

19h. Did your agency experience any delays or other difficulties in spending funds from Program Income in PY 2010?

Yes

No

If yes, please provide a short description of the reasons for the delays or other difficulties:

[Q20 will be activated by 'yes' responses in the In-Kind Contributions category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

20a. When did agency first receive weatherization funds from In-Kind Contributions?

20b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

20c. Please describe the change in leveraging relationships between your agency's low-income weatherization program and In-Kind Contributions during the ARRA period.

Extremely positive

Positive

No change

Negative

Extremely Negative

20d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

increase

decrease

stay the same

20e. If leveraged funding from In-Kind Contributions decreased from PY 2008, was the change attributable to increased ARRA funding?

Yes

No

Not applicable

20f. Did you require local agencies to follow DOE rules when spending weatherization funds from In-Kind Contributions in PY 2010?

Yes

No

[20g will appear if respondent answered 'no' in 20f]

20g. What were the major differences in the rules governing the expenditure of In-Kind Contributions in comparison to the rules governing the expenditure of DOE funds? _____

20h. Did your agency experience any delays or other difficulties in spending funds from In-Kind Contributions in PY 2010?

Yes
 No

If yes, please provide a short description of the reasons for the delays or other difficulties:

[Q21 will be activated by 'yes' responses in the Non-profits category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

21a. When did agency first receive weatherization funds from Non-profits? _____

21b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

21c. Please describe the change in leveraging relationships between your agency's low-income weatherization program and Non-profits during the ARRA period.

Extremely positive
 Positive
 No change
 Negative
 Extremely Negative

21d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

increase
 decrease
 stay the same

21e. If leveraged funding from Non-Profits decreased from PY 2008, was the change attributable to increased ARRA funding?

Yes
 No
 Not applicable

21f. Did you require local agencies to follow DOE rules when spending weatherization funds from Non-Profits in PY 2010?

Yes
 No

[21g will appear if respondent answered 'no' in 21f]

21g. What were the major differences in the rules governing the expenditure of Non-Profits funds in comparison to the rules governing the expenditure of DOE funds?

21h. Did your agency experience any delays or other difficulties in spending funds from Non-profits in PY 2010?

Yes

No

If yes, please provide a short description of the reasons for the delays or other difficulties:

[Q22 will be activated by 'yes' responses in the Third Party category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

22a. When did agency first receive weatherization funds from Third Parties (foundations, lenders)? _____

22b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

22c. Please describe the change in leveraging relationships between your agency's low-income weatherization program and Third Parties during the ARRA period.

Extremely positive

Positive

No change

Negative

Extremely Negative

22d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

increase

decrease

stay the same

22e. If leveraged funding from Third Parties decreased from PY 2008, was the change attributable to increased ARRA funding?

Yes

No

Not applicable

22f. Did you require local agencies to follow DOE rules when spending weatherization funds from Third Parties in PY 2010?

Yes

No

[22g will appear if respondent answered 'no' in 22f]

22g. What were the major differences in the rules governing the expenditure of Third Party funds in comparison to the rules governing the expenditure of DOE funds?

22h. Did your agency experience any delays or other difficulties in spending funds from Third Parties in PY 2010?

Yes

No

If yes, please provide a short description of the reasons for the delays or other difficulties:

[Q23 will be activated by 'yes' responses in All Other, Specify category of Question 1 and deactivated (skipped) for 'no' responses in that category.]

23a. When did agency first receive weatherization funds from **[insert text from 'All Other, Specify']**?

23b. Number of years that agency worked to achieve this leveraging relationship (leave blank if unknown): _____

23c. Please describe the change in leveraging relationships between your agency's low-income weatherization program and **[insert text from 'All Other, Specify']** during the ARRA period.

Extremely positive

Positive

No change

Negative

Extremely Negative

23d. How do you expect leveraged funding from this source to change from PY 2010 to the post-ARRA period in PY 2012?

increase

decrease

stay the same

23e. If leveraged funding from **[insert text from 'All Other, Specify']** decreased from PY 2008, was the change attributable to increased ARRA funding?

Yes

No

Not applicable

23f. Did you require local agencies to follow DOE rules when spending weatherization funds from **[insert text from 'All Other, Specify']** in PY 2010?

Yes

No

[23g will appear if respondent answered 'no' in 23f]

23g. What were the major differences in the rules governing the expenditure of **[insert text from 'All Other, Specify']** funds in comparison to the rules governing the expenditure of DOE funds?

23h. Did your agency experience any delays or other difficulties in spending funds from [insert text from 'All Other, Specify'] in PY 2010?

Yes

No

If yes, please provide a short description of the reasons for the delays or other difficulties:

24. How important were leveraged funds for your agency's Weatherization Program in PY 2010 compared to program years without additional ARRA funding? (Check best answer)

Very important

Important

Not very important

Not important at all

25. Did your agency set aside funding to advocate for leveraged resources in PY 2010?

Yes

No

26. How successful would you rate your agency's efforts to acquire leveraged funds in PY 2010? (Check best answer)

Very successful

Successful

Not very successful

Not successful at all

State does not seek leveraged funds

27. What factors limited the success of your agency's efforts to acquire leveraged funding in PY 2010? _____

28. Did your agency encounter any of the following problems in spending non-DOE funds in general in PY 2010? (Check all that apply)

Our agency could not easily increase the number of homes weatherized during the year in order to better spend non-DOE funds

Our agency required the expenditure of DOE weatherization funds before non-DOE funds were expended

We had insufficient staff to manage the receipt and expenditure of non-DOE funds

We had inadequate accounting systems to manage the receipt and expenditure of non-DOE funds

Guidance received from DOE and/or our state made it difficult to expend non-DOE funds in a timely manner

Other _____

29. Have you modified your agency's weatherization program practices or regulations in the three years prior to PY 2010 to facilitate spending and reporting on leveraged resources?

Yes

No

30. How has the influx of ARRA funding impacted previously existing leveraging relationships?

a. Extremely positive impact

b. Positive impact

c. No Impact

d. Negative impact

e. Extremely negative impact

31. Can leveraging relationships damaged or lost during ARRA be re-built post-ARRA?

a. Yes, absolutely

b. Yes, probably

c. Uncertain

d. No, probably not

e. No, definitely not

32. What aspects about your agency's low-income weatherization program are most misunderstood by actual and potential leveraging partners? _____

33. How has your program worked to overcome these misunderstandings? _____

34. What information would your agency's weatherization program like to have that could be used to overcome these misunderstandings? _____

35. What other information would your agency's weatherization program like to have that could be used to 'sell' leveraging relationships? _____

36. What was the quality of the support and assistance on leveraging the Weatherization Assistance Program with other funding sources and related programs that your agency received from the state and its contractors in Program Year 2010? (Check best answer)

very high quality

high quality

moderate quality

low quality

very low quality

not applicable

36a. If appropriate, why did you rate the quality very low or low? _____

37. Overall, what is your expectation for total agency leveraged for low-income weatherization funding post ARRA in PY 2012 compared to pre-ARRA PY 2008

a. Greatly increased

b. Increased

- c. Same level
- d. Decreased
- e. Greatly decreased

38. On balance, how beneficial do you think will ARRA funding prove to be over the longer-term on your agency's ability to leverage DOE WAP-program funding for low-income weatherization?

- a. Extremely beneficial
- b. Beneficial
- c. No long-term impact
- d. Unbeneficial
- e. Extremely unbeneficial

PART 3. WAP ARRA Program Information

1. For many years, the national weatherization network and the state-level national weatherization networks had been relatively stable. During the ARRA period, did the composition of your agency-level weatherization network change?

- a. Yes
- b. No (Skip to Question 5)

2. How would you characterize the magnitude of this change?

- a. Extreme
- b. Great
- c. Moderate
- d. Small

3. Using the table below, please list the names and contributions of the major new players.

Name	Description of Weatherization Related Contributions (e.g., provides training, sells energy efficient products)

4. On balance, how beneficial have these new players been to your agency's weatherization program?

- a. Extremely beneficial
- b. Beneficial
- c. Neither beneficial nor unbeneficial
- d. Unbeneficial
- e. Extremely unbeneficial

Please Explain _____

5. During the ARRA period, did organizational responsibilities for your agency's weatherization program (e.g., reporting lines, organizational home) change?

- a. Yes
- b. No (Skip to Question 9)

6. How did the organizational responsibilities change? Please Explain _____

7. In your opinion, was this change a result of increased visibility of your agency's weatherization program created by the substantial funding increase?

- a. Yes
- b. No

8. On balance, how beneficial has this change been to your agency's weatherization program?

- a. Extremely beneficial
- b. Beneficial
- c. Neither beneficial nor unbeneficial
- d. Unbeneficial
- e. Extremely unbeneficial

Please explain _____

9. During the ARRA period, how has state-level oversight of your agency's weatherization assistance program changed?

- a. Greatly increased
- b. Increased
- c. Stayed the same
- d. Decreased
- e. Greatly decreased

10. During the ARRA period, has your state passed any new laws and/or implemented any new regulations that have directly impacted your agency's weatherization assistance program?

- a. Yes
- b. No (Skip to Question 14)

11. Please describe the new laws and/or regulations. _____

12. On balance, how beneficial have these new laws and/or regulations been to your agency's weatherization program?

- a. Extremely beneficial
- b. Beneficial
- c. Neither beneficial nor unbeneficial
- d. Unbeneficial
- e. Extremely unbeneficial

Please explain _____

13. Would these laws and/or regulations have been passed with or without the increased attention on the program attributable to ARRA?

- a. Wholly due to ARRA
- b. Primarily due to ARRA
- c. Somewhat due to ARRA
- d. Would have been passed anyway without ARRA

14. During the ARRA period, how has the visibility of your agency's weatherization program changed with respect to elected officials?

- a. Greatly increased
- b. Increased
- c. Stayed the same
- d. Decreased
- e. Greatly decreased

15. On balance during the ARRA period, how has the public's support for your agency's weatherization assistance program changed?

- a. Greatly increased
- b. Increased
- c. Stayed the same
- d. Decreased
- e. Greatly decreased

Please explain _____

16. How would you rate the public's understanding of your agency's low-income weatherization assistance program?

- a. Excellent
- b. Good
- c. Fair
- d. Poor

17. Please explain those aspects of the program that are most frequently misunderstood by the public. _____

18. During the ARRA period, how has media attention on your agency's weatherization program changed?

- a. Greatly increased
- b. Increased
- c. Stayed the same
- d. Decreased
- e. Greatly decreased

19. Please rate the quality of the media coverage your agency's weatherization program has received during the ARRA period?

- a. very high quality
- b. high quality
- c. moderate quality
- d. low quality
- e. very low quality
- f. N/A no media coverage (skip to 22)
- g. no opinion

20. Please describe the overall media coverage of your agency's weatherization program during the ARRA period:

- a. very positive
- b. positive
- c. neither positive or negative
- d. negative
- e. very negative

21. What topics did the media mainly focus on? (check all that apply)

- a. Jobs created
- b. Energy saved
- c. Helping low income households
- d. Waste, fraud and abuse
- e. Lack of energy savings
- f. Organizational mis-steps
- g. Other _____

22. Will weatherization issues identified rightly or wrongly by the media during ARRA have lasting impacts on weatherization funding for your agency in the future?

- a. could substantial reduce funding
- b. could reduce funding
- c. no impact
- d. could increase funding
- e. could substantially increase funding

23. On balance, how beneficial has been the attention paid to your agency's weatherization program during the ARRA period?

- a. Extremely beneficial
- b. Beneficial
- c. Neither beneficial nor unbeneficial
- d. Unbeneficial
- e. Extremely unbeneficial

Please explain _____

PART 4. WAP PROGRAM IMPLEMENTATION DURING THE ARRA PERIOD

1. How have relationships changed between your state weatherization office and your local weatherization agency during ARRA?

- a. become much more congenial
- b. become more congenial
- c. no changes
- d. become more strained
- e. become much more strained

2. What was the quality of the administrative support and assistance that your agency received from the state and its contractors in Program Year 2010? (Check best answer)

- _____ 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 agency received from the state and its contractors in Program Year 2010? (Check best answer)

- _____ 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 agency received from the state and its contractors in Program Year 2010? (Check best answer)

- 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 with other funding sources and related programs that your agency received from the state and its contractors in Program Year 2010? (Check best answer)

- 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 that your agency received from the state and its contractors in Program Year 2010? (Check best answer)

- 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 2010? In other words, did the program rules allow your agency to tailor your program to your needs (very flexible) or proscribe your program to only one way of operation (very inflexible) (Check best answer)

- Very Flexible
- Flexible
- Inflexible
- Very Inflexible

7a. Using PY 2010 as the reference point, how should the program rules change?

- 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 agency's weatherization program in Program Year 2010.

9. Which statement best describes how your agency dealt with program expansion during the ARRA period?

- a. promoted existing weatherization staff to management positions and hired new entry level workers
- b. hired new weatherization managers and hired new entry level workers
- c. promoted existing weatherization staff to management positions and hired contractors to ramp up production
- d. simply hired contractors to ramp up production

10. Did expanding your agency's level of production result in any economies of scale benefits?

- a. No
- b. some benefits
- c. moderate benefits
- d. substantial benefits

11. How did your agency change its in-take procedures during the ARRA-period from the procedures used pre-ARRA (i.e., PY2008)? (Check Best Answer)

- a. No change
- b. Eligibility checks more stringent
- c. Eligibility checks less stringent
- d. Other _____

12. Were there any material, equipment or other supply chain bottlenecks during the ARRA period that negatively impacted weatherization production by your agency?

- a. No
 - b. Yes
- If yes, what was in short supply? _____

13. To what extent have large DOE programs, WAP, State Energy Program, Energy Efficiency Community Block Grant Program, competed for labor during the ARRA period?

- a. Not at all
- b. a small extent
- c. a moderate extent
- d. a large extent
- e. a very large extent

14. During the ARRA period, how has state-level oversight of your state's weatherization assistance program changed?

- a. Greatly increased
- b. Increased
- c. Stayed the same
- d. Decreased
- e. Greatly decreased

15. How did your agency manage increasing workloads and performance expectations?

Please Explain _____

16. Has ARRA funding allowed your agency to purchase and implement new information technologies to improve program administration?

- a. Yes
- b. No

If yes, please describe these new information technologies. _____

17. Has ARRA funding allowed your agency to purchase new field technologies (e.g., Infrared Thermal Imagers) to improve weatherization audits and measure installation?

- a. Yes
- b. No

If yes, please describe these purchases.

18. How timely has DOE's guidance been during the ARRA period?

- a. very timely
- b. timely
- c. not very timely
- d. not timely at all

19. How clear has DOE's guidance been during the ARRA period?

- a. very clear
- b. clear
- c. not very clear
- d. not clear at all

20. During PY 2010, how much of a burden were your agency's administrative costs associated with increased oversight during the ARRA period (e.g., from DOE IG, GAO)?

- a. no burden
- b. slight burden
- c. moderate burden
- d. substantial burden
- e. extreme burden

21. Did your agency change its audit approach during the ARRA-period from the approach used pre-ARRA (i.e., PY2008)?

- a. Yes, went from priority list to computerized audit
- b. Yes, went from computerized audit to priority list
- c. Yes, changed from one computerized audit tool to another
- d. No

22. To what extent have measure costs used in SIR calculations diverted from actual measure costs experienced during ARRA in PY 2010? (choose the best description)

- a. on balance actual measure costs were much higher than SIR calculations
- b. on balance actual measure costs were higher than SIR calculations
- c. SIR calculations and actual measure costs were about the same
- d. on balance SIR calculations and actual measure costs were about the same but the actual measure costs fluctuated a great deal up and down
- e. on balance actual measure costs were lower than SIR calculations
- f. on balance actual measure costs were much lower than SIR calculations

23. Did your agency change its quality assurance procedures during the ARRA-period (e.g., PY 2010) from the procedures used pre-ARRA (i.e., PY2008)?

- a. Yes, procedures are much more stringent
- b. Yes, procedures are more stringent
- c. No

24. Did your agency change its approach to using in-house crews versus contractors during the ARRA-period (e.g., PY 2010) from the procedures used pre-ARRA (i.e., PY2008)?

- a. Contractors are performing a much higher percentage of weatherization jobs
- b. Contractors are performing a higher percentage of weatherization jobs
- c. In-House crews are performing a higher percentage of weatherization jobs
- d. In-house crews are performing a much higher percentage of weatherization jobs
- e. No

24a. If there was a change, what prompted the change? (choose the best description)

- a. Change was solely made to meet production targets
- b. Change was solely made to deal with Davis-Bacon
- c. Change was made to meet production targets and deal with Davis-Bacon
- d. Other (Please explain) _____

24b. How did your training requirements change with the change in approach?

- a. All workers were required to be trained in weatherization work
- b. Only in-house crews were required to be trained
- c. Only contractors were required to be trained
- d. No training was required.

25. Did your agency implement any innovative approaches to weatherization during the ARRA-period?

- a. No
- b. Yes

If yes, please describe the innovative approaches _____

26. Did your agency implement any other major programmatic changes during the ARRA-period?

- a. No
- b. Yes

If yes, please describe these programmatic changes _____

27. Does your agency have a deferral policy?

- a. Yes
- b. No

28. Please estimate the number of units where weatherization was deferred during PY 2010?

- a. 0%
- b. 1-5%
- c. 6-10%
- d. 10-20%
- e. 21-30%
- f. more than 30%

28a. What was the leading cause for deferral during PY 2010? _____

28b. Please estimate what percentage of units where weatherization was deferred during PY 2010 will eventually be weatherized?

- a. 0%
- b. 1-25%
- c. 26-50%
- d. 51-75%
- e. 76-90%
- f. 91-100%

28c. Please describe your agency's deferral rates in PY2010 compared to PY2008:

- a. very great increase
- b. great increase
- c. increase
- d. no change
- e. decrease
- f. great decrease
- g. very great decrease

29. How much of a priority does your agency place on health and safety when weatherizing homes?

- a. Very high priority
- b. High priority
- c. Medium priority
- d. Low priority
- e. Very low priority
- f. No priority

30. What would be the ideal amount of money per home your agency would like to spend for addressing health and safety issues? _____

31. Of all the homes weatherized by your agency in Program Year 2010, how many did you refer to non-energy programs for additional services (e.g., nutrition; family counseling)? _____

32. What approaches did your local agency use to recruit new qualified, reliable and trustworthy weatherization crew members and how effective were these approaches: _____

33. What approaches did your local agency use to train the expanded weatherization workforce?

- a. Utilized existing state program-based training resources, i.e. State monitors or other staff providing training to the network
- b. Sent weatherization workers to one of 26 newly funded weatherization training centers
- c. Sent weatherization workers to one of 12 legacy weatherization training centers (i.e. COAD, NRCERT, INCAA, BPC, PG&E Stockton, NYSWDA, FSL, AEA, etc. YY)
- d. Utilized private, consultant training providers (i.e. Saturn, BMI, EMC)
- e. OTHER Please explain: _____
- f. No additional training was provided

34. In your opinion, how effective were these approaches?

- a. Highly effective
- b. Very Effective
- c. Somewhat effective
- d. No effective

35. Has your agency implemented new certification requirements for weatherization workers during the ARRA period?

- a. No (go to Q28)
- b. Yes

36. What new certifications are required? (Check all that apply)

- a. BPI Building Analyst
- b. BPI Envelope
- c. BPI Residential Building Envelope Accessible Areas Air Leakage Control Installer
- d. Residential Building Envelope Whole House Air Leakage Control Crew Chief
- e. BPI Manufactured Housing
- f. BPI Heating
- g. BPI Air Conditioning and Heat Pump
- h. BPI Multifamily
- i. HERS
- j. LEED
- k. Lead Safe Weatherization
- l. Lead Certified Renovator
- m. NAHB Green Building
- n. Other _____

37. Did staff turnover change during the ARRA period as compared to the pre-ARRA period?

- a. Turnover greatly increased
- b. Turnover increased
- c. No, turnover did not change
- d. Turnover decreased
- e. Turnover greatly decreased

38. Which statement best describes changes in the level of employment in your agency's jurisdiction resulting from Davis-Bacon?

- a. large number of jobs created
- b. small number of jobs created
- c. no change in the number of jobs
- d. small number of jobs lost
- e. large number of jobs lost
- f. don't know

39. Which statement best describes the impact of Davis-Bacon on wages paid to weatherization workers by your agency?

- a. large increase in wages
- b. small increase in wages
- c. no increase in wages
- d. small decrease in wages
- e. large decrease in wages

40. Did Davis-Bacon paperwork requirements lead some experienced weatherization contractors who worked for your agency to leave the low-income weatherization field?

- a. No
- b. Yes, a few
- c. Yes, many

41. How much of a problem was faced by your agency in coordinating wages stipulated by Davis-Bacon for weatherization workers whose operations spanned multiple counties?

- a. no problem
- b. small problem
- c. moderate problem
- d. large problem
- e. very large problem
- f. N/A because your agency works exclusively in one county

42. Have changes in weatherization costs associated with Davis-Bacon altered choices of measures installed in homes?

- a. No
- b. Yes

If yes, please explain _____

43. In your agency, on average, how much did Davis-Bacon rules increase the cost of weatherizing low-income multifamily buildings four stories and higher?

- a. no increase
- b. 1-10%
- c. 11-20%
- d. 21-30%
- e. 31+%
- f. N/A

44. Overall, how did Davis-Bacon impact the costs of weatherization in your agency?

- a. greatly increased costs
- b. increased costs
- c. no change in costs
- d. decreased costs
- e. greatly decreased costs

45. Does your state allow the weatherization of large low-income multi-family buildings?

- a. yes
- b. no (go to Q 40)

If not, why not? _____

46. Does your agency weatherize large low-income multi-family buildings?

- a. No
- b. Yes

47. What are the barriers to weatherizing large low-income multi-family buildings? (check all that apply)

- a. lack of trained auditors
- b. lack of trained crew
- c. too expensive
- d. building owners are uncooperative
- e. energy savings are not high enough
- f. unclear guidance from DOE on owner contributions
- g. other _____

48. Does your state allow the weatherization of public housing, that is, housing owned by a public housing authority?

- a. Yes
 - b. No (go to Q. 43)
- If not, why not? _____

49. Does your agency weatherize public housing?

- a. No
- b. Yes

50. What are the barriers to weatherizing public housing units?

51. Does your state allow the weatherization of HUD assisted housing?

- a. Yes
 - b. No (go to Q46)
- If not, why not? _____

52. Does your agency weatherize HUD assisted housing?

- a. No
- b. Yes

53. What are the barriers to weatherizing HUD assisted housing? _____

54. How many units of each type were weatherized in your state in PY 2010?

Type of Housing	Large Multi-family (Not Public Housing or HUD Assisted)	Public Housing Multi- family	HUD Assisted Multi- family

55. Are there any DOE rules that could be changed to make it easier to weatherize large low-income multi-family buildings?

- a. No
 - b. Yes
- If yes, please explain _____

56. Does your agency's weatherization program have an agreement with your State Historic Preservation Office (SHPO)?

- a. Yes
- b. No

57. What percentage of units weatherized by your agency in PY 2010 fell under the SHPO agreement?

- a. 0
- b. 1-5
- c. 6-10
- d. 11-15
- e. 15+

58. In general, have the historic preservation guidelines changed the types of measures installed in these homes?

- a. No
- b. Yes

If yes, please explain _____

59. Has low-income weatherization had an impact in preventing home foreclosures during the ARRA period in your agency's jurisdiction?

- a. no
- b. little impact
- c. moderate impact
- d. great impact
- e. very great impact
- f. don't know

59a. Has low-income weatherization had an impact on preventing homelessness during the ARRA period in your agency's jurisdiction?

- a. no
- b. little impact
- c. moderate impact
- d. great impact
- e. very great impact

60. How many homes were on your wait list for weatherization in PY 2010? _____

61. On average, how long was a home on the wait list before it was weatherized in PY 2010?

62. In Program Year 2010, did your agency set targets and actively solicit participation by dwelling units of the types shown below? (Check all that apply)

Type of dwelling unit	Set targets for number of dwelling units of this type to weatherize	Actively sought participation by households residing in this type of dwelling unit
Single Family Attached and Detached		
Small Multi-family (2-4 units)		
Multifamily (5 or More Units per Building)		
Mobile Home		
Shelter		

63. Which of the following approaches did your agency use in Program Year 2010 to market your weatherization services to low-income households? (Check all that apply)

- Targeted mailings to potential clients _____
- Targeted mailings to landlords of potential clients _____
- Visits to potential clients _____
- Visits to landlords of potential clients _____
- Advertising with other social service agencies _____
- Advertising in local newspapers or magazines _____
- Radio advertising _____
- Television advertising _____
- Posting information on website _____
- Other (please specify) _____

64. Who was responsible for leading the marketing/outreach efforts described above? (Check all that apply)

- Agency management _____
- In-house outreach coordinator _____
- Contractor outreach coordinator _____
- In-house communications staff _____
- Contractor communications staff _____
- Other in-house staff (please specify) _____
- Other contractor staff (please specify) _____

65. In general, how satisfied were you with the length of time between the client's request to have their home weatherized and when it was actually weatherized in PY 2010? (Check best answer)

- _____ Very satisfied
- _____ Satisfied
- _____ Not satisfied or dissatisfied
- _____ Dissatisfied
- _____ Very dissatisfied

66. In general, how easy was it to schedule your visits to client homes to perform audits, weatherization, and inspections in PY 2010? (Check best answer)

- Very easy
- Easy
- Not easy or difficult
- Difficult
- Very difficult

67. What percentage of households whose homes were weatherized by your agency in Program Year 2010 registered a complaint regarding the quality or nature of the weatherization job performed on their dwelling unit? _____

68. Of those households that filed complaints, what percentage of these required some additional work? _____