

# JOBSOURCE WEATHERIZATION ASSISTANCE PROGRAM POLICIES

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## OVERVIEW

The JobSource Weatherization Assistance Program (WAP) Policies are designed to provide basic information about working conditions and weatherization procedures and requirements. Please understand that these policies cannot anticipate every situation or answer every question. Please refer to the JobSource Personnel Policies Handbook, the IHEDA Weatherization Assistance Program Policy and Procedures Manual, the Standard Work Specifications (SWS) and the Indiana Field Guide for more specific and detailed information.

## STAFF APPEARANCE AND BEHAVIOR

### Personal Appearance

There is no official JobSource dress code. Employees of JobSource are expected to wear clothing appropriate to their job and work site. Clothing and appearance must be neat, clean, in good business taste and not constitute a work hazard or distraction.

Employees who arrive to work inappropriately dressed will be sent home and directed to return to work in proper attire. Under such circumstances, employees will not be compensated for the time away from work.

### Staff Behavior

WAP staff will conduct themselves in a professional manner while in client's homes, while driving and other assigned duties such as training, meetings and other weatherization related functions.

Verbal or physical conduct that harasses, disrupts or interferes with another's work performance or that creates an intimidating, offensive or hostile environment will not be tolerated.

Employees are expected to maintain high standards of personal appearance, conduct, cooperation, efficiency and economy in their work. All employees must attempt to correct any faults in their performance which are called to their attention and should also avoid any behavior and actions that conflict with JobSource's policies.

### Conflict of Interest

JobSource will maintain written standards of conduct covering conflicts of interest and governing the actions of its employees engaged in the selection, award and administration of contracts. No employee, officer or agent of JobSource may participate in the selection, award or administration of a contract supported by a Federal award if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. The officers, employees and agents of JobSource may neither solicit nor accept gratuities, favors or anything of monetary value from contractors or parties to subcontracts. However, JobSource may set standards for situations in which the financial interest is not substantial or the gift is an unsolicited item of nominal value. The standards of conduct will provide for disciplinary action to be applied for violations of such standards by officers, employees or agents of JobSource.

If JobSource has a parent, affiliate or subsidiary organization that is not a state, local government, or Indian tribe, JobSource must also maintain written standards of conduct covering organizational conflicts of interest. Organizational conflicts of interest means that because of relationships with a parent company, affiliate, or subsidiary organization, JobSource is unable or appears to be unable to be impartial in conducting a procurement action involving a related organization.

### **Non-Collusion**

No member, employee, representative, agent or officer of JobSource, directly or indirectly, shall enter into or accept any offering of any sum of money or other consideration for contracts/agreements other than that which appears upon the face hereof. Furthermore, if a member, employee representative, agent or officer of JobSource has a financial interest in contracts/agreements, JobSource attests to compliance with the disclosure requirements in IC 4-2-6-10.5.

The Non-Collusion Affidavit is attached as Attachment A

### **RENTAL PROPERTY POLICY**

WAP will weatherize rental properties if the tenant qualifies and the landlord signs and agrees to the terms of the Rental Property Agreement. It is the tenant's responsibility to contact the landlord and have this Agreement signed before the work begins.

The landlord will need to contribute \$1,000.00 or ¼ of the cost (whichever is less) for the installation of weatherization materials and labor costs.

The Rental Property Agreement also contains a Weatherization Rental Unit Appeal form.

The Rental Property Agreement is attached as Attachment B

### **CLIENT RESPONSIBILITIES**

A "Rights and Responsibilities" form will be completed by the client. This form lists the responsibilities of the client, their rights, the appeal process and notification that the WAP will report to the appropriate authorities any child abuse, or illegal activities.

The Weatherization Rights and Responsibilities form is attached as Attachment C

### **SAFETY CONCERNS**

#### **OSHA Training**

- All WAP Energy Auditors, Quality Control Inspectors (QCIs) and Managers must complete the OSHA 10-Hour Training at a minimum.
- All weatherization contractor crew leaders and retrofit installers must complete the OSHA 10-Hour Training
- HVAC contractors, retrofit installer mechanical technicians and installer helpers must complete the OSHA 10-Hour Training at a minimum
- All other weatherization contractors must complete the OSHA 10-Hour Training at a minimum

## General Safety

- If a staff person or contractor observes any illegal activities at a weatherization house they are to leave the site immediately and report the activity to the Weatherization Manager. The Weatherization Manager will meet with the Deputy Executive Director and the Deputy Executive Director will then decide the appropriate action to be taken
- If a staff person or contractor has reason to believe a child is being abused or neglected they are to leave the site immediately and report the activity to the Weatherization Manager. The Weatherization Manager and the staff person or contractor will meet with the Deputy Executive Director and the Deputy Executive Director will then decide the appropriate action to be taken
- If, at any time, staff or contractors feel threatened by the client or anyone in the household they should gather their tools and exit the house and report the incident to the Weatherization Manager
- Ladders should be inspected on a regular basis and a tag or note affixed to the ladder listing the person who inspected the ladder and the date of the last inspection
- Hard hats, Tyvek suits, safety goggles, respirators and other Personal Protective Equipment (PPE) will be provided to the WAP staff by the agency. It is the responsibility of the staff to notify the Weatherization Manager when these items need to be replaced. Safety equipment should be worn on the job when deemed necessary by the staff. **In the current and post-COVID19 era, additional caution will be taken to keep workers and clients safe**
- All other tools owned by JobSource and the contractors should be inspected regularly and be kept in safe working order
- Asbestos materials such as siding, duct insulation, attic and wall insulation should not be disturbed, cut or drilled through by the WAP staff or contractors
- **JobSource will utilize the Respiratory Fit Program developed by INCAA, modified for use by JobSource**
- **The Infectious Disease Preparedness and Response Plan will be implemented when appropriate and considered an adjustable policy in response to current conditions**

**The Infectious Disease Preparedness and Response Plan is attached as Attachment D**

## Safety Data Sheet (SDS)

A Safety Data Sheet (SDS) is a short technical report that provides the known hazards of a specific material. They are written by chemical manufacturers for chemicals they produce or import. The purpose of the SDS is to provide written information for the safe use and handling of a particular chemical. They may be written in different forms, but all are required to give you the following basic information:

- Identification (chemical and physical)
- Hazardous ingredients
- Physical and chemical characteristics
- Emergency procedures
- First aid or medical procedures
- Manufacturer's name, address and phone number
- Health hazards
- Physical hazards (fire and explosion data)
- Reactivity data
- Personal protection data
- Spill and leak procedures
- Waste disposal methods

The WAP will keep the SDS available at the office **as well as assigned vehicles** for any hazardous chemical worked with as required by State/Provincial and Federal laws. Employees will check with the Weatherization Manager for the location of the SDS file located in the JobSource office. Employees will read the SDS prior to working with any unfamiliar chemical to inform them of any hazards and then follow all the manufacturer's recommendations.

All materials will be handled in accordance with manufacturer specifications of Material Safety Data Sheet (MSDS) standards to eliminate hazards associated with incorrect, defective or improperly used respirator and personal protective equipment (PPE).

A hazardous material is any substance which is potentially toxic, incompatible with other substances, corrosive, explosive, flammable or combustible, or poses unusual physical hazards under normal use conditions or emergencies. Look at the label on chemical containers if you see words like FLAMMABLE, DANGER, COMBUSTIBLE, HAZARDOUS, POISON, CAUTION or WARNING, then you know a SDS is required. The SDS will help you work safely with chemicals, but only if you read it.

- Any new hire will be trained on the SDS
- All employees will be instructed on where they are located in the office
- JobSource vehicles will be equipped with SDS sheets
- All employees will get a SDS sheet with all new chemicals purchased
- ~~All employees will take a Hazardous Communication Quiz~~
- Inspectors will go to jobs that are in progress and will check contractor's SDS sheets onsite

## **Meth Policy**

The **Weatherization Assistant** will check the Meth Lab website ([www.in.gov/meth/2371.htm](http://www.in.gov/meth/2371.htm)) before the initial audit to identify if the house is on the list. If the house is on the Meth Lab Website list, no contact will be made. Indication of a meth house will be noted on application.

If a client calls wanting services, and their house is listed on the website for Meth Labs, staff will advise them that "The house is on the Meth Lab Website list, and JobSource cannot provide services to them until their house is removed from the website." JobSource will send out a deferral letter, indicating that the house is listed on the Meth Lab Website. JobSource will need documentation stating that the house is clean and has passed testing procedures before being considered for any weatherization activity.

JobSource staff and contractors will attend Meth Lab training. JobSource staff and contractors will look for signs of a Meth Lab during the weatherization process. If the signs are there, the JobSource staff or contractors are to leave immediately and contact the Weatherization Manager. The Weatherization Manager will report the suspected activity to the Deputy Executive Director and the Deputy Executive Director will then decide the appropriate action to be taken.

The Weatherization Manager will document if JobSource staff or contractors were exposed to a suspected Meth Lab site.

## **Asbestos- in siding, walls, ceilings, etc., Vermiculite, on pipes, furnaces or small covered surfaces**

- Follow all worker safety specifications in Global Worker Safety Section.
- OSHA 29 CFR 1926.1101 details the safety and health regulations for construction in regards to asbestos
- If unsure whether material contains asbestos, do not disturb the material. A qualified asbestos professional may be contacted to assess the material and to sample and test as needed.

- When working around asbestos-containing material (ACM), the following **WILL NOT** be done:
  - ✓ Dust, sweep or vacuum debris
  - ✓ Saw, sand, scrape or drill holes in the material
  - ✓ Use abrasive pads or brushes to strip materials
  - ✓ When vermiculite is present in attic, do not de-pressurize the building with a blower door
- Attic insulation that looks like vermiculite (as opposed to fiberglass, cellulose or urethane foams) will not be removed or disturbed.
- **The Energy Auditor will complete a Suspected Asbestos Containing Material report and inform the client of any suspected materials and secure the client's signature.**

**Suspected Asbestos Containing Materials form is attached as Attachment E**

### **Knob and Tube Wiring**

- Non-contact testing method will be used to identify live wiring.
- Auditor will inspect and assess the house to identify knob and tube wiring, ~~and conduct a voltage drop test when live knob and tube wiring is found.~~
- Live knob and tube will not be covered or surrounded.
- A dam that does not cover the top will be created to separate insulation from the wire path **OR** knob and tube wiring will be replaced with new appropriate wiring by a qualified electrician in accordance with local codes.
- The inspection by a qualified electrician is not needed when the knob and tube will not be disturbed and proper **nonconductive insulation** damming will be installed.

### **Lead Safe Practices**

The Environmental Protection Agency (EPA) Renovation, Repair and Painting (RRP) Program Rule (40 CFR Part 745) in pre-1978 homes and proposed changes to this rule (Federal Register/Vol. 75, No. 87/May 6, 2010) will be complied with, to be superseded by any subsequent final rulemaking or any more stringent state or federal standards. In response to DOE's actions in adopting the EPA's revised lead protocols, JobSource will adhere to the new EPA standards as outlined in the Renovation, Repair and Painting Rule (RRP). The steps taken to be compliant are outlined in the IHEDA Policies and Procedures Manual, Section 4.8 which starts on Page 30.

- JobSource will have a least one lead paint analyzer.
- JobSource will obtain and maintain Lead Firm status through the EPA.
- All contractors performing work in homes built prior to 1978 are required to obtain and maintain Lead Firm status through the EPA.
- JobSource will have at least one certified renovator.
- Each contractor will have at least one certified renovator.
- Presence of lead-based paint in pre-1978 homes will be assumed unless testing confirms otherwise.
- Work practice requirements will be followed and are specified in the IHEDA Policy and Procedures Manual, Section 309.

### **Confined Spaces**

WAP staff and contractors will abide by OSHA rules while in a confined space – Subpart AA – Confined Space in Construction. This standard sets forth requirements for practices and procedures to protect employees engaged in construction activities at a worksite with one or more confined spaces.

Before an employee enters the space, the internal atmosphere must be tested, with a calibrated direct-reading instrument, for oxygen content, for flammable gases and vapors, and for potential toxic air contaminants, in that order. Any employee, who enters the space, or that employee's authorized representative, must be provided an opportunity to observe the pre-entry testing required by this paragraph. No hazardous atmosphere is permitted within the space whenever any employee is inside the space.

If a hazard is detected during entry:

- Each employee must leave the space immediately;
- The space must be evaluated to determine how the hazard developed, and
- JobSource must implement measures to protect employees from the hazard before any subsequent entry takes place. This may include:
  - Ventilate the immediate areas where an employee is or will be present within the space and must continue until all employees have left the space.
  - The air supply for the forced air ventilation must be from a clean source and must not increase the hazards in the space.
  - All electrical will be shut off to crawlspace or attic when work is being performed.

## **CONTRACTOR POLICIES**

HVAC and building performance contractors may submit a proposal and complete a contractor price list annually. JobSource has a procurement policy (See the next section). Proposals submitted to JobSource will be reviewed and scored by any combination of Executive Director, Deputy Executive Director, Controller, Administrative Assistant, the Weatherization Manager, Energy Auditors and Quality Control Inspectors. Contractors may be selected for a period of two-years based on their score.

All contractors must comply with Section 7 of the Indiana Weatherization Policy and Procedures. This policy describes training and certification requirements for Weatherization Program staff and contractors. Contractors who do not comply with Section 7 will not receive work from JobSource until they are in compliance.

Contractors will conduct themselves in a professional manner while in client's homes as well as trainings, meetings and other weatherization related functions.

New staff and new contractor employees will have nine months plus 45 days to earn the required certifications.

Background checks will be completed for contractors and their employees. New employees must not engage in weatherization activities until the background check has been completed and approved.

## **CONTRACTOR PROCUREMENT**

Contractor Procurement Policy is attached as Attachment F

## CONTINUING EDUCATION UNITS (CEUs)

All Indiana Weatherization Competent individuals must comply with Section 7.4 of the IHEDA Weatherization Policy and Procedures Manual, Continuing Education Units.

- Record of CEUs will be tracked by JobSource, as well as INCAA, for their Weatherization staff, crews and contractors.
- The 16 CEUs requirement is per individual and not per competency.
- JobSource will ~~track the training that was taken~~ secure documentation connected to the claimed CEUs for review at time of monitoring. This tracking will include documentation verifying completion of the training, who performed the training and the length of time that the training lasted.
- Non-technical training CEUs is limited to eight hours.
- The requirement for CEUs begins at the time that an Indiana Competency is obtained. The following schedule will be used:
  - Competency obtained on or after July 1: 6 CEUs required
  - Competency obtained on or after October 1: 4 CEUs required
  - Competency obtained on or after January 1: 2 CEUs required
- ~~This tracking~~ Training documentation will include the following information:
  - ✓ Individual name and competency(s) held
  - ✓ Date competencies expire
  - ✓ Hire date
  - ✓ Attendance at Annual Competency Maintenance Training
  - ✓ Current BPI/INCAA Certifications where applicable
  - ✓ Record of training for 16 hours of CEUs

## CLIENT SELECTION

Eligible Clients are found in the Energy Assistance Program database or from agency originally generated applications.

JobSource serves Madison, Grant, Howard and Tipton Counties. The anticipated funding levels to be spread across the service delivery area is: Madison County 44%, Grant County 22%, Howard County 28% and Tipton County 5%. Every effort will be made to comply with the poverty population demographics of the service applications.

Once eligibility has been determined, each Subgrantee must follow its client priority policy. JobSource must give priority to “at-risk” eligible households. In accordance with 10 CFR 440.16, priority must be given in identifying and providing weatherization assistance to households where one or more of the following exist:

1. Elderly household member(s)
2. Disabled household member(s)
3. Household member(s) under the age of 18
4. High Energy Burden
5. High Energy Usage

Within the above listed priority, JobSource will give one Priority Point for each “at-risk” factor. Households with multiple “at-risk” factors will have priority in the order served.

The JobSource priority system must be applied equally to both renter and owner-occupied dwellings and applied equitably to all areas of the JobSource territory.

**Households who do not meet at least one of the priority categories may only be served once all eligible priority households in the JobSource territory have been served.**

In the event that the number of eligible at-risk households moving through the selection process exceeds the limited funds available to serve all of those clients, JobSource will consider the oldest application approval date for positioning applicants within the “at-risk” group. The application approval date, for Weatherization purposes, will be the date all documentation establishing eligibility and at-risk factors can be established.

An application with at least one priority point may be moved up on the list when working in the same area to save travel time.

In addition to the above eligibility factors, the following will be considered:

- Verification that the home has not received prior weatherization and is not on the deferral or non-eligible lists will be performed.
- County information will be used to verify owner of property.
  - ✓ If discovered the client is buying the home on contract, the weatherization assistant will review contracts to verify legal owner.
- Verification will also be completed to verify that property is not up for tax sale.
- The files are then given to the Auditor/Housing Assistant to review and make the initial phone contact.
- If contact cannot be made, postcards will be sent with a 10-day deadline to call back. If clients do not contact – files are marked for non-contact and the information will be entered into the wait list.

## **APPEALS PROCEDURE**

When the Administrative Assistant, Auditor/Housing Assistant, an Energy Auditor, Quality Control Inspector, Weatherization Manager or Executive Deputy Director determines that a household is ineligible, JobSource will, within ten (10) working days, provide a written denial to the client detailing the reason(s) for the denial and advising them of their right to appeal the decision. JobSource will retain in the household file, a copy of the denial letter with the appeal procedures that were sent to the client and pictures documenting the conditions leading to the deferral.

## **CLIENT WAITING LIST PROCEDURES**

JobSource will access the Energy Assistance Program (EAP) database and build a weatherization wait list based on being identified as “at-risk.”

When a client calls JobSource, expresses interest in receiving weatherization, and identifies one or more “at-risk” factors, that client will be put on the waiting list.

JobSource will work through the established waiting list identifying potential households to weatherize.



EAP and Weatherization applications are valid up to one year from the date the application was approved.

Once the house is audited and building eligibility has been determined, the client will be taken off the waiting list.

## PRE-AUDIT PROCEDURE

The **Weatherization** Assistant will work through the wait list and research the following items:

- Previous deferral or weatherized status
- Meth lab identification
- Home ownership and current tax status
- **Current health considerations**

If clear, **Weatherization** Assistant will contact client to schedule an appointment to determine structure eligibility. **The building screener will inspect the unit.** The following will be completed on each unit:

- Client Rights and Responsibilities
- Moisture Assessment Findings Checklist
- Photo documentation of every aspect of the structure and property
- Recommendation as to deferral status
- **Current health considerations**

Findings are to be uploaded into the shared drive in a client folder. Recommended deferrals are given to the Weatherization Manager.

Quality Assurance for clients to be weatherized will be completed by the Administrative Assistant before structures are given to an Energy Auditor.

## DEFERRAL PROCESS

While clients may meet eligibility requirements for weatherization, JobSource may defer a client because the housing unit is not a good candidate for weatherization. A deferral may occur due to problems that are beyond the scope of weatherization such as condition of the structure, area is slated for redevelopment or health and safety reasons.

Deferrals may take place during any phase of the weatherization process, including, but not limited to:

- **during the initial screening process**
- during or after the initial audit;
- the work performance phase, or
- immediately following the identification of a health and safety risk to the occupants or to crew and contractors.

Client will receive notice of the deferral and explanation in writing.

Postponement of work is required until deferral issues can be resolved either by the client and/or by alternative sources of assistance. Below are examples of existing conditions under which a dwelling unit can be deferred until certain corrective actions occur:

- Elevated carbon monoxide levels where abatement is not possible using WAP funds.
- Existing moisture problems that cannot be resolved under the health and safety limits.
- Unit with sewage or other sanitary problems that not only endangers the client, but the workers who will perform the weatherization work.
- Occupant's health condition.
- Building's structure or its mechanical systems, including electrical and plumbing, are in such a state of disrepair that failure is imminent and these conditions cannot be resolved in a cost effective manner.
- Client is uncooperative, abusive or threatening to crew, subcontractors, auditors, inspectors or others who must work on or visit the unit.
- Extent and condition of lead-based paint in the house would potentially create further health and safety hazards.
- The unit has been condemned or electrical, heating, plumbing, or other equipment has been "red tagged" by local or state building officials or utilities.
- The unit is in foreclosure, for sale or condemned and the owner will not be occupying the unit throughout the duration of the weatherization work.
- Any existing condition that could endanger the health and/or safety of the work crew or subcontractor and cannot be safely abated within the scope of weatherization.

All clients who are deferred will receive a letter outlining the reason(s) for the deferral. A copy of the deferral letter must be placed in the client file. The deferral letter must be specific as to the reason(s) for the deferral, outline next steps for the client and provide a timeline for action.

Any client who has received a deferral by a local sub-grantee will be allowed to pursue an appeal. The appeal will follow the established procedures set forth in Section 103 of The Weatherization Assistance Program Policy & Procedure Manual.

Pictures will be taken documenting the conditions leading to deferral and will be placed in the client file.

## **ENERGY AUDIT**

The Energy Auditor will re-evaluate the decision of non-deferral status. If the structure is acceptable, the JobSource Energy Auditor will audit a dwelling and build a work scope. The Energy Auditor will present the work scope to the Weatherization Manager and have a discussion on measures, costs and contractor selection. All specifics on the tasks and documentation required is in the IHEDA Policy and Procedures Manual. All requirements of the Energy Auditor can be found in the IHEDA Policy and Procedures Manual.

If the structure is not acceptable, the Energy Auditor will review the status with the Weatherization Manager.

## **FINAL INSPECTION**

All Final Inspections will be performed by a DOE Quality Control Inspector (QCI). All requirements of the QCI can be found in the IHCD Policy and Procedures Manual. All forms used by the QCI are detailed in the appendices to the IHCD Policies and Procedures Manual.

Every DOE & LIHEAP unit reported as a “completed unit” must receive a final inspection ensuring that all work meets the minimum specifications outlined in the Standard Work Specification (SWS) and with the Indiana Field Guide.

Every client file must have a QCI form that certifies that the unit had a final inspection and that all work met the required standards. The form must be signed by a certified Quality Control Inspector.

Independent QCI – The independent QCI is an individual that has no involvement in the prior work of the home either as the auditor or as a member of a crew or contractor.

Either an Energy Auditor, QCI or Retrofit Installer Mechanical may perform an Interim Inspection on the mechanicals. They will verify the work that was completed with the work specified in the work scope. They will examine the charges on invoice with the charges that were estimated by the auditor. Specifics on Interim Inspections can be found in the IHCD Policies and Procedures Manual.

## **FILE DOCUMENTS**

Files are completed with check off lists to ensure compliance with IHCD Weatherization Assistance Program Policy and Procedures Manual. Files are available for monitoring reviews. Required documentation and forms are detailed in the IHCD Weatherization Policy and Procedures Manual, Section 202: Required forms.

## **AGENCY OWNED VEHICLES**

Each Energy Auditor and Quality Control Inspector will be provided a vehicle by JobSource to do weatherization related duties. These vehicles are usually owned by the Indiana Housing and Community Development Authority (IHCD).

Approved use of these vehicles includes:

- Transportation to and from energy audits, interim inspections and final inspections of weatherization homes;
- Transportation to pick up materials at our suppliers;
- Transportation to and from weatherization related training and meetings in or out of our service area. Sometimes this may include out-of-state and overnight training, and
- Other weatherization or agency related duties as determined by the Weatherization Manager or JobSource Deputy Executive Director.

Only JobSource staff are permitted to drive the weatherization vehicles. No passengers are allowed to ride in JobSource weatherization vehicles except JobSource staff, Weatherization contractors and IHCD staff and contract monitors, INCAA training staff and other associated program personnel (work related).

JobSource weatherization vehicles will be kept secure during energy audits and inspections. They will also be parked in a secure location designated by the Weatherization Manager or JobSource Deputy Executive Director when not in use.

JobSource vehicles may be taken home by the Energy Auditor and Quality Control Inspector during the winter months when snow adverse weather is expected with the approval of the Deputy Executive Director. This is **ONLY** at times when heavy snowfall adverse weather is predicted and should be the exception not the rule.

Any damage to a weatherization vehicle or any required or needed maintenance must be reported to the Weatherization Manager immediately.

Tracking routine maintenance of the vehicles such as oil changes, light bulbs, windshield wiper blades, tires and other minor maintenance is the responsibility of the person to whom the vehicle is assigned. Oil changes and other minor and major repairs will be completed by approved auto mechanic shops.

All weatherization vehicles should be kept clean and organized. This is also the responsibility of the person to whom the vehicle is assigned. If staff members need to use one of the other vehicles in the JobSource fleet, those vehicles must also be kept clean and organized.

~~The pickup truck owned by JobSource will be used for JobSource, Inc. activities.~~

Please see Chapter 5 – WORKING CONDITION/ENVIRONMENT, Section M. Use of Vehicles and Equipment, Pages 51 – 52 of the JobSource Personnel Policies.

## **EQUIPMENT INVENTORY**

An inventory of equipment and tools has been established. The listing includes quantity, model/serial number, description, condition, location, purchase date, purchase price and funding source.

Staff will complete an annual inventory of equipment, tools and materials on hand. Any electronics to be disposed will be identified to the Weatherization Manager. Weatherization will follow JobSource's policies and procedures regarding the disposal of electronics.

## **ATTACHMENTS**

Attachment A: Non-Collusion Affidavit

Attachment B: Rental Property Agreement

Attachment C: Weatherization Rights and Responsibilities

Attachment D: Infectious Disease Preparedness and Response Plan

Attachment E: Suspected Asbestos Containing Material Form

Attachment F: Contractor Procurement Policy

**Attachment A**  
**NON-COLLUSION AFFIDAVIT**

The undersigned attests, subject to the penalties for perjury, that the undersigned, or her/his representative, agent, member or officer of the contracting party, has not, nor has any other member, employee, representative, agent or officer of the firm, company, corporation or partnership represented by her/him, directly, entered into or offered to enter into any combination, collusion or agreement to receive or pay, and that he/she has not received or paid any sum of money or other consideration for the execution of the annexed contract other than that which appears upon the face of the Agreement.

The Agency and the Contractor have executed this Agreement on the \_\_\_\_\_ day of \_\_\_\_\_, 2020. The parties, having read and understood the foregoing terms of this Agreement, do by their respective signatures dated below hereby agree to the terms thereof.

**JobSource**

**Contractor**

3530 Mounds Road  
P.O. Box 149  
Anderson, IN 46015-0149  
765.646-9276

\_\_\_\_\_  
Doug Eckerty  
Executive Director

\_\_\_\_\_

**Attachment B**  
**WEATHERIZATION**  
**Rental Property Agreement**

<b>Property Owner:</b>		<b>Phone:</b>	
<b>Street Address:</b>		<b>City:</b>	
<b>Tenant/Applicant:</b>		<b>Phone:</b>	
<b>Property Address:</b>		<b>WZ Job #:</b>	
<b>Monthly Rent:</b>			

I, \_\_\_\_\_, certify that I am the owner, or authorized agent for the owner, of  
 (Landlord Printed Name)

the property located at the above address and that said property is not currently listed for sale and that the property is leased/rented to \_\_\_\_\_.  
 (Tenant/Applicant Name)

I wish to participate in the Weatherization Assistance Program being offered by JobSource. This program will allow installation of weatherization materials and JobSource will determine which combination will result in the greatest energy savings and contribute to the health and safety of the occupants. No undue or excessive enhancements shall occur to the value of the dwelling unit.

I understand if I wish to have the property listed above weatherized, I agree to contribute \$1,000.00 or ¼ of the cost (whichever is less) for installation of weatherization materials and labor costs. The contribution will be waived only if the property owner himself qualifies for weatherization services based upon his own household income and he/she maintains this address as a primary residence. No co-pay is required from not-for-profit organizations or Public Housing Authorities. The \$1,000.00 (or lesser amount) must be paid prior to commencement of work.

I, \_\_\_\_\_, understand that there are no explicit or implied warranties  
 (Landlord Printed Name)

regarding said weatherization work or materials. I understand a safety evaluation of all combustion appliances will be done and must pass safety inspections before any weatherization work takes place on my property.

For a one-year period after the weatherization work on the unit is completed, rent cannot be increased, unless the increase is not related to weatherization services performed, as noted in 10 CFR 440.22(b)(3)(ii).

- I have read the above Federal rule and understand that this Rule applies to my dwelling unit after this program weatherizes the dwelling.
- I agree to allow program personnel access to the above rental property to accomplish the weatherization work.
- I, as the owner or authorized agent for the owner, hereby release and agree to indemnify and hold harmless JobSource, its staff and contractors from any liability in connection with the performance of the weatherization services or any act of eventuality arising therefrom.

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Owner/Authorized Agent Printed Name and Signature Date

## Weatherization Rental Unit Appeal Process

The primary purpose of the weatherization program is to lower the total residential energy expenditures of low-income persons.

Should a rental property be weatherized by JobSource, and the client experience a rent increase, improper eviction or sale of the property, the client can contact JobSource and file a complaint. JobSource will contact the property owner seeking a response following the complaint. JobSource will make appropriate referrals if necessary.

<b>Property Owner:</b>		<b>Phone:</b>	
<b>Street Address:</b>		<b>City:</b>	
<b>Tenant/Applicant:</b>		<b>Phone:</b>	
<b>Property Address:</b>		<b>Job #:</b>	
<b>Monthly Rent:</b>			
<b>Date Weatherized</b>			
<b>Date of Complaint</b>			

Complaint Description: \_\_\_\_\_

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Property Owner Response: \_\_\_\_\_

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JobSource Response: \_\_\_\_\_

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## **Attachment D**

# **Infectious Disease Preparedness and Response Plan**

The JobSource Weatherization Program is moving into a clean-safe working environment in response to the COVID19 pandemic. Exercising situational awareness, social distancing and personal protection should accomplish that outcome. This is not meant to create a sterile environment, but a clean-safe working environment for workers and clients. Any time a worker feels there is cause for concern, workers should put personal safety before the completion of work tasks.

**In General, know the symptoms: coughing, fever, shortness of breath, difficulty breathing and others as described by the CDC. If an employee develops symptoms of respiratory illness and a fever, do not go to work. Call your health care provider immediately. Let the Weatherization Manager know you are experiencing symptoms and not reporting for work.**

### **The JobSource Weatherization Program in General:**

#### **Elimination of Risk:**

- If there is a sick or infected person in a client's home, we will defer services to that client. We will not work in an infected client's home.
- Do as much work as possible without client contact
- Use or establish exterior accesses when feasible

#### **Substitute materials and approaches:**

- Using situational awareness, substitutions when feasible may be necessary
- Consider portable sanitary toilet facilities instead of client bathroom when feasible

#### **Utilize Engineering Controls when appropriate:**

- Create physical barriers to isolate workers, clients and/or hazards when appropriate

#### **Utilize Administrative Controls:**

- Limit the number of workers entering a client home
- Limit number of workers using the same tools
- Decontaminate tools, and vehicles as necessary

### **JobSource Weatherization Staff Specifically:**

#### **Weatherization Employee Responsibilities:**

- Perform daily health check
- Report employee health check results to Weatherization Manager
- Sanitize your hands and all personal items you bring to work, ie: cell phones, lunch coolers and other personal items prior to entering the workplace
- Keep personal items in your office room, not in common areas

#### **Weatherization Manager Responsibilities:**

- Confirm that the employee has all the necessary PPE and cleaning supplies
- Call client to survey risk for COVID-19 using <https://c19check.com/start> prior to deferral screening, audit, interim inspection or quality control inspection, use situational awareness
- Explain to client what JobSource will need for a productive working environment
- Site check: enter home only if necessary, confirm employee safety protocols are being observed

- Keep a Weatherization Safety log for employees, workers and clients

#### **Working at the JobSource office:**

- Enter the building and wash or sanitize your hands
- Practice social distancing- 6 feet apart
- Exercise situational awareness and minimize time spent around others
- Verify adequate personal protection equipment and cleaning supplies are present for that day's work
- Keep items like tools, equipment and computers on your person or in your office room
- Do not leave items laying around in common areas like kitchen, conference room or hallways
- Keep employee office room clean and disinfect as needed
- Wash hands or use hand sanitizer frequently

#### **Working in Client Homes:**

- Contact client to confirm latest survey results taken and inform them that you are healthy
- Clarify what you will be doing that day and what you need the client to do so you can protect one another
- Before entering house, wash hands or use hand sanitizer
- Put on appropriate PPE for the task being performed, ie: disposable gloves, shoe covers and mask or respirator,
- Enter the house and evaluate using situational awareness
- Plan work carefully to minimize number of trips in and out, the number of tools/equipment required to complete the job, as well as the time it takes to be efficient and effective
- Proceed with work mindful of traditional safety procedures: safety glasses, work gloves, etc
- Upon exit, remove all PPE, secure for reuse or disposal
- Wash hands or use hand sanitizer

#### **Work Stoppages:**

- If stopping work for break time, lunch, gathering materials, etc, do the following:
  - Inform the client, give details of the stoppage, identify when you will be back, ask the client to avoid the work area in the meantime
  - When outside, remove any PPE as needed in an appropriate manner
  - Wash hands or use hand sanitizer before reentry
  - Replace or reuse PPE as appropriate
- When leaving the jobsite, and returning later that day or the next day, isolate tools and equipment in a manner that will keep them from contaminating the vehicle or getting contaminated

#### **Work Completion:**

- Move tools and equipment back to work vehicle
- Clean up work site
- Inform the client you are finished for that time period and give specific instructions as necessary
- When outside, remove any PPE as needed in an appropriate manner
- Wash hands or use hand sanitizer
- Sanitize agency vehicle controls when done with vehicle
- Sanitize equipment and tools used at the completion of the job

### **Final Considerations:**

This Infectious Disease Preparedness and Response Plan is imperative for JobSource to provide Weatherization services to our clients. It is intended to protect our clients, ourselves, our co-workers, our families, and all members of the community we come into contact with. These practices may or may not come naturally, but they need to be in the forefront of your mind in order to become habits.

Exercise situational awareness. Analyze, understand and manage the risk.

Do not hesitate to ask the Weatherization Manager for further guidance in the field.

Do not hesitate to remind your co-workers of these procedures if you see someone not following correct practices.

Employees not following the correct practices can be reported to the Weatherization Manager.

The Weatherization Manager not following the correct practices can be reported to the Deputy Executive Director.

## Attachment E

### SUBJECT: WEATHERIZATION PROCUREMENT

This policy provides guidance in the procurement of weatherization contractors.

#### Background:

Indiana Housing & Community Development Authority (IHCDA) provides guidance for the administration of the weatherization assistance programs. The guidance includes specific direction and referral to “The Common Rule” and all other applicable federal, state, and local laws, rules, regulations, administrative procedures, guides, manuals, program rules and definitions, and any amendments thereto, in performing its obligations, which includes procurement. While the format and wording of these documents vary, the intent is that:

1. there are consistent policies and procedures;
2. there are procurement standards;
3. there is free and open competition;
4. there are methods of procurement described and followed;
5. all necessary steps are taken to assure that minority and women-owned businesses are used when possible, and
6. a cost or price analysis is performed.

#### Definitions:

**Procurement:** For purposes of this policy, the term “procurement” includes only the acquisition of contractors to perform building performance, HVAC, plumbing, and/or electrical services.

**Weatherization Contractor Procurement Packet:** The packet used to solicit interest to perform residential energy conservation measures.

**Small Purchase Procedures:** The procurement method used to purchase weatherization services.

**Solicitation:** Means a Procurement Packet, Request for Proposal, or any other document, such as a Request for Quotation, issued by a purchasing agency for the purpose of soliciting offers to perform a contract.

#### General Policies:

All procurement will be conducted in a manner that ensures that the most effective service provider is selected. Procurements will be conducted in a fair and impartial manner and in accordance with all applicable federal and state laws. All procurement activities will be conducted in a confidential manner until an award is made. All procurements will be conducted in accordance with Ordinance No. 1998 BC-0-4 of the Board of Commissioners of Madison County, Indiana, filed on July 28, 1998.

## General Requirements:

### 1. How are proposals solicited:

- JobSource advertises in the local newspaper for anyone interested in contracting for building performance, HVAC, plumbing, electrical and/or roofing. The advertisement is run for 3 business days.
- To the extent possible, small firms, minority firms, and women-owned businesses will be included in the weatherization contractor's mailing list, and will be targeted for mailings and advertised procurement.
- All current weatherization contractors, all of the respondents to the advertisements and any other party who has expressed an interest in performing these services will be sent a procurement packet.
- The procurement packet, to the best extent possible, will be sent to at least three small firms, minority firms, and women-owned businesses.

### 2. What criteria are used to select the contractors:

- The ability to respond to the Contractor Proposed Material/Labor Cost Sheet and the prices indicated is evaluated and given a weight of up to **20** points.
- The ability to respond to the Contractor's Information Statement is evaluated and given a weight of up to **20** points. This statement includes information relating to the contractor's:
  - ✓ Type of Work Performed
  - ✓ Ability to Complete Work
  - ✓ Contractor Integrity
  - ✓ Record of Past Performance
- Certificate of Insurance will be evaluated and given a weight of up to **10** points. Certificate of Insurance needs to include general liability and workman's compensation.
- Reference checks will be evaluated and given up to **20** points.
- The average number of days to complete homes will be evaluated and given a weight of up to **10** points.
- Number of years in business will be evaluated and given a weight of up to **20** points. Each year in business will equal one point.

### 3. The timeline for sending out, receiving and processing procurement packets:

- Procurement for building performance, HVAC, plumbing, and/or electrical contractors will be done annually during the last three months of the LIHEAP program year.
- Contractors will be given two to three weeks to respond.
- Awards will be made within one week of procurement packet due date.
- Contracts will begin being awarded Offers of Service based on the procurement at the beginning of the next LIHEAP program year.

4. How are contractors selected or dismissed from the process once packets are received:
  - JobSource will negotiate with the top building performance, HVAC, electrical, plumbing and roofing contractors to determine if an acceptable agreement can be reached and continue down the list of acceptable contractors until we have no more than three contractors for each type of service.
  - Any contractor who receives a score of less than 75 is not an acceptable contractor.
  - Contractors determined not acceptable will be notified that they will not receive any awards this program year and are advised of the complaint procedures and given their rights.
  
5. What method is used to determine prices:
  - Prices will be summarized by item and type of job, building performance, HVAC, electrical, plumbing or roofing.
  - The best prices will be determined and with the top contractor being given an opportunity to accept these prices or negotiate an acceptable price.
  - The next best contractor will be given an opportunity to accept these prices and so on until we have no more than three acceptable contractors for each type of service.
  
6. How are contractors notified of their acceptance to work with the program:
  - JobSource will notify the contractors informing them of their status.
  - JobSource will explain what the order of preference means and informs the top contractor of each type of service to call JobSource to make an appointment to negotiate an acceptable price.
  - All other contractors will be notified in the order of their points received, in the evaluation, until no more than three contractors are selected for each type of service.
  - All other contractors will be notified, by letter, that they have not been selected this year and given their rights and encouraged to submit a procurement packet next time packets are available.
  
7. How is work divided up amongst contractors:
  - Contractors are given a group of work orders, usually one to three at a time, based on their ability and availability to perform.
  - JobSource prepares a work order for up to three buildings and presents them to a contractor for his acceptance.
  - The contractor is given three business days to accept the work order, except when emergency response is necessary as in electrical, plumbing or roofing issues.
  - Any work order not accepted by the first contractor selected, is then offered to another contractor.
  - If the second contractor does not accept an offer, JobSource will determine the cause and negotiate an acceptable offer.

- If the second contractor still does not accept the work order, JobSource then goes down the list to the third contractor. If still not accepted, JobSource will start through the list again.

8. The contracting process:

- JobSource prepares an agreement for the signature of the contractor.
- This agreement contains the boilerplate terms of a contract such as:
  - ✓ Term of Agreement
  - ✓ How Work Orders are Given
  - ✓ Modification
  - ✓ Suspension of the Agreement
  - ✓ Termination for the Convenience of the Agency
  - ✓ Termination for the Convenience of the Contractor
  - ✓ Termination for Cause
  - ✓ Assignment or Transfer
  - ✓ Obligation of Funds
  - ✓ Drug-Free Work Environment Policy
  - ✓ Non-Collusion affidavit
  - ✓ And Other Clauses as Necessary
- JobSource will prepare a Work Order for each personal residence indicating the work to be performed.
- This Work Order will be given to the contractor for his acceptance.

9. Contractors warranties:

- Contractors are required to warranty their work, all parts and labor for a period of one year, as well as, honor all manufacturers' warranties.

Price Analysis:

A price analysis will be used in all instances to determine the reasonableness of a proposed contract price, including contract modifications. A price analysis is the process of examining and evaluating a price without looking at the estimated cost elements and proposed profit. It is used when price reasonableness can be established on the basis of a catalog or market price of a commercial product sold in substantial quantities to the general public or based on prices set by law or regulations. JobSource will use a price analysis for our weatherization procurement based on the competitive pricing given in this response.

Attachment F  
**JOBSOURCE**  
**Suspected Asbestos Containing Material**

<b>CLIENT NAME</b>			
<b>ADDRESS</b>			
<b>CONTACT INFO</b>			
<b>EVALUATOR</b>		<b>DATE</b>	

State rules and regulations (IHCDA 3.3.2.3) require JobSource to inform the client in writing that suspected Asbestos Containing Materials (ACMs) are present and what precautions will be taken to ensure occupant and worker safety during weatherization. JobSource must also formally notify client in writing of results if testing was performed.

	YES	NO
<b>Asbestos testing was performed</b>	<input type="checkbox"/>	<input type="checkbox"/>

	YES	NO
<b>Attic, Crawlspace and Basement</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Attic</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Crawlspace</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Basement</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Precautions:</b>		

	YES	NO
<b>Mechanical Systems Contain Asbestos</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Furnace and ducts</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Water Heater</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Cook Stove</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other Appliances</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Precautions:</b>		

	YES	NO
<b>Structure contains asbestos</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Ceilings</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Foundation</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Walls</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Floors</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Roof</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Other</b>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Precautions:</b>		

Signature \_\_\_\_\_ Date \_\_\_\_\_