



# I09 Weatherization Readiness Project Checklist

Job Number: \_\_\_\_\_

A No response requires explanation in comments    ✓ Requires additional document in packet

Client Name:	Phone#
Address:	email:

## Section I

Deferral Date: \_\_\_\_\_

### Deferral Checks

<u>a. Header</u>	Yes	No	N/A	<u>b. Reason for Deferral</u>	Yes	No	N/A	<u>c. Condition to Resume</u>	Yes	No	N/A
1. Notification Date				1. Tied to ECM or HSM				1. Each Deferral Reason covered			
2. Assessment Date				2. Specific reference to ECM/HSM				2. Detail specifics given			
3. Intro Summary				3. Referenced ECM/HSM on Audit							
4. Landlord Info				4. Detail on how barrier prevents work							
5. Agency letter-head											
<hr/>											
<u>d. Time Limits</u>	Yes	No	N/A	<u>e. Appeal</u>	Yes	No	N/A	<u>f. Resources</u>	Yes	No	N/A
1. Specific Date				1. Not signed by Agency Manager				1. Are Referral resources available			
2. Within E5 limits				2. Next appeal level explained				2. Referral contact info provided			
3. Extension per Agency policy				3. Clear Point of Contact				3. Can this referral really address the Deferral Issue?			
<hr/>											
<u>g. Eligibility Impacts</u>	Yes	No	N/A	<u>h. Closing</u>	Yes	No	N/A	<u>i. Backup Docs</u>	Yes	No	N/A
1. If corrections are made				1. Contact for verification inspection				1. Proof of Delivery ✓			
2. If corrections are <b>NOT</b> made				2. Letter signed				2. Pictures showing Deferral issue(s)			
3. Will client need to requalify				3. Clear Point of Contact				3. Pictures of potential ECM/HSM			
4. When will client need to requalify											

## Section II

Wx Ready Prep Start Date: \_\_\_\_\_

### Wx Ready Prep

Agency Approval Date: \_\_\_\_\_

<u>a. Wx Ready Eligible</u>	Yes	No	N/A	<u>b. SOW Development</u> ✓	Yes	No	N/A	<u>c. Bid Process</u>	Yes	No	N/A
1. DOE Qualified				1. Purpose/Background				1. Open & competitive bid process			
2. Complete Deferral				2. Contractor Responsibilities				2. Proof of advertisement ✓			
3. Completed Energy Audit*				3. Work Standards				3. Outreach to contractors			
4. Eligible work <sup>1</sup>				4. Terms & Conditions				4. A Sole Source policy & process in place			
5. Is this a realistic project				5. New Client Health Assessment needed				5. Complete Scorecards ✓			
6. Are there contractors that can do this work				6. Outcomes & Deliverable				6. Project Bid Evaluation Summary ✓			
7. Is State WAP Case by Case needed ✓				7. Develop bid evaluation criteria							
				8. Develop bid scorecard							
				9. Obtain Agency Approval to Proceed							

\* If Deferral prevented energy audit from being completed there must still be enough collected data to run partial audit to determine potential ECM and triggered HSM to allow Wx Ready



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## Section III

Wx Ready Work  
Start Date: \_\_\_\_\_

### Wx Ready Work

Wx Ready Com-  
pletion Date: \_\_\_\_\_

<u>a. Pre-Start</u>	Yes	No	N/A	<u>b. In Progress</u>	Yes	No	N/A	<u>c. Work Completion</u>	Yes	No	N/A
1. Signed contractor agreement in place ✓				1. Work meeting scope				1. Are the Deferral issues completely resolved			
2. Client Notified of start				2. Work meeting program standards				2. Is the client satisfied			
3. Client Health Assessment				3. Deferral issues being completely resolved				3. Is completed Energy Audit still valid			
4. Agency staff scheduled				4. New Deferral Issues being created				4. Are Wx Work Orders still valid			
				5. Does there need to be a Change Order							
				6. Change Orders in writing prior to proceeding ✓							

## Section IV

Wx Ready  
Close Date: \_\_\_\_\_

### Wx Ready Closeout

Wx Ready Re-  
ported Date: \_\_\_\_\_

<u>a. Final Inspection</u>	Yes	No	N/A	<u>b. Contractor</u>	Yes	No	N/A	<u>c. Wx Ready Packet</u>	Yes	No	N/A
1. Inspection of Wx Ready Work documented ✓				1. Contractor Invoice obtained ✓				1. Wx Ready Checklist			
2. Safety Testing ✓				2. Payment processed				2. Comments for No responses			
								3. Additional Documents			
								4. Reported to State WAP			

## Section V

### Comments

## Section VI

### Approvals

	Date	Date
Deferral Review & Approval:	Wx Ready In Progress Approval:	
Wx Ready Prep Review:	Wx Ready Closeout Approval:	
Wx Ready Agency Approval:		

<sup>1</sup> Wx Ready Ineligible Activities: Sanitary condition cleaning/abatement, removal or disposal of client property, illegal drug related issues, hostile clients, mold cleaning/abatement