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IOWA WEATHERIZATION PROGRAM NOTICE 14-04 revised

TO: Executive Directors and Weatherization Coordinators
FROM: Gwen Howe, Bureau of Weatherization
DATE: October 27, 2014
RE: Policies and Procedures Manual and General Appendix Revisions

The following is a summary of the changes in the Iowa Weatherization Policies and Procedures Manual:

Section 3.10 Iowa WAP Eligibility Rules

- Added language from LIHEAP's rules regarding proof of legal residency.

Section 3.25 Previously Weatherized Dwellings (Re-weatherization)

- Add language explaining that only HEAP funds may be used to re-weatherize dwellings

Section 3.30 When Weatherization Services Should be Deferred – Under “When a dwelling”

- Revised bullet to agree with Work Standards: The presence of a primary heat source unvented space heater unless the unvented space heater is removed from the dwelling. If the unvented space heater is a secondary heat source, it may be left in place if it meets ANSI Z21.11.2 requirements. (A vented space heating system may be installed as a replacement if needed.)
- ⊖ Deleted Bullet: The presence of an unsafe combustion heating system or water heater, unless the landlord repairs or replaces the unsafe combustion appliance. (For renter situations.)

Section 4.13 Selecting Clients

- Deleted Bullet: In emergency situations, such as a heating system quits working during cold weather or an unsafe furnace or water heater poses an immediate health and safety risk to the client(s).

Section 4.15 Crisis Situations – added section

Section 4.34 Landlord Contribution Requirement – deleted section

Section 5.31 Heating System Repair and Replacement

- Added: There is no expenditure limit on replacement heating systems.
- Revised: All forced-air furnaces installed must be a minimum of 95% or higher AFUE ~~are to have a minimum 80%~~ (Annual Fuel Utilization Efficiency) rating, except in cases of attic or garage installation or manufactured homes. A minimum of 80% AFUE is required in those cases.
- Revised: Furnace repair/replacement work in standard dwellings must be performed in accordance with the Work Standards and be in compliance with the:
 - Added: International Residential Code (IRC) (most current version)
 - Added: Local Codes adopted by the authority having jurisdiction (where they exist)
 - Added: The Furnace Manufacturer's Specifications (must be left in the home)
- Deleted: Renter-Occupied Dwellings section

Section 5.32 Water Heater Repair and Replacement

- Revised: If a water heater has minimal draft and/or spillage ~~and no carbon monoxide is being produced~~, a carbon monoxide alarm must be installed. If after weatherization is completed, the water heater is spilling, the water heater must be repaired or replaced. ~~Or the problem must be repaired before the house is weatherized.~~
- Added: There is no expenditure limit on water heater replacements.
- Revised: Water heater repair/replacement work in standard dwellings must be performed in accordance with the Work Standards and be in compliance with the:
 - Added: International Residential Code (IRC) (most current version)
 - Added: Local Codes adopted by the authority having jurisdiction (where they exist)
 - Added: The Water Heater Manufacturer's Specifications (must be left in the home)

Section 5.33 Space Heaters and Other Combustion Appliances

- Revised: If a dwelling contains an unvented space heater, the dwelling cannot be weatherized unless the unvented space heater is removed from the dwelling or the unvented space heater is a secondary heat source that meets ANSI Z21.11.2 requirements. This is because "tightening" a dwelling could create the potential for carbon monoxide and moisture problems with an unvented space heater. When a dwelling contains an unvented space heater, the agency should inform the client of the potential health and safety problems with the unvented heater and try to persuade the client to have the unvented space heater replaced with a vented space heater or, if applicable and cost-effective, replaced with a central heating system. If a client decides to keep an unvented space heater in operation that does NOT meet ANSI Z21.11.2 requirements, all work must be deferred.

Section 5.34 Carbon Monoxide, Carbon Monoxide Alarms, and Propane Alarms

- Carbon Monoxide Alarms Section - Revised: Carbon monoxide alarms are required in all dwellings. Homes containing no combustion appliances or solid fuel burning units without an attached or tuck-under garage are exempt from this rule. ~~A maximum of two carbon monoxide alarms, per dwelling, may be purchased and installed using program funds.~~ All alarms installed must meet the current United Laboratories (UL) standard. Additional alarms may be installed using program funds if required by local codes for single family residences (specific code requirement must be noted in file). If installing more than one CO alarm, they should be installed outside each separate sleeping area. Refer to the Work Standards for information on the current UL standard for carbon monoxide alarms. Installed alarms must have the expiration date, as warranted by the manufacturer, written on the front of the alarm in permanent ink.
- Added a section for Propane Alarms

Section 5.36 Lead Paint

- Revised section to reflect current rules and regulations

Section 5.37 Slate-Sided Dwellings

- Revised section to reflect current rules and regulations

Section 5.38 Other Health and Safety Measures and Issues

- Asbestos/Slate Siding
 - Added: Clients will be provided with the Asbestos in Homes handout ~~asbestos safety information~~ anytime that materials with presumed asbestos are present in the house.
- Building Tightness Limits
 - Changed to Minimum Ventilation Levels
- Mechanical Ventilation
 - Removed language referencing the Air-to-Air Exchanger Approval Request Form because it is no longer in use. However, prior approval is still needed from the DCAA.
- Manufactured Home Doors
 - Added language explaining that although having two operable doors is a fire safety measure, it must be entered as an incidental repair cost in the MHEA Audit.

Section 5.41 Energy Efficiency Assessment for Single-Family Dwellings

- Zone Pressures Test
 - Revised language in this section to coincide with the Work Standards.
- Building Tightness Limit and Depressurization Tightness Limit
 - Changed to Minimum Ventilation Levels.
- Refrigerator Replacement
 - Added: Refrigerator replacement may be charged to DOE, the secondary utility, or HEAP.
- Freezer Replacement
 - Added: Replacement freezers must be Energy Star rated.

Section 5.51 Incidental Repairs

- Added language regarding entering incidental repairs in the MHEA Audit.

Section 5.71 Energy Auditor/Inspector/Crew/Contractor Health and Safety

- Revised section to reflect current rules and regulations, including adding that contractor-based agencies must stipulate in their contracts with contractors (refrigeration vendors are excluded from this requirement) that the contractor must have a written Hazard Communication Policy and Training Plan which includes providing education for their employees on the new format for the SDS.

Section 5.73 Fuel Switching

- Added sub-heading “Fuel Switching – Client Request”

Section 5.74 Disaster Relief Activities

- Revised this section to reflect changes made in PN13-01 and DOE-14 contracts. Only HEAP funds may be used for disaster relief.

Section 5.76 Other Issues

- Production
 - Added: If the work cannot be completed within six months of the home energy audit, the home must be re-audited before proceeding (per PN12-03).

Section 5.81 Final Inspections by Agencies

- Added language indicating that the final inspection sheet must have a clear pass/fail line for each visit and an explanation regarding failures (per PN12-03).
- Revised language to require the client or landlord to sign and date the final inspection

Section 6.11 House (Client) Files

- Updated the list of documentation required in client files.
- Changed \$10,000 overall Expenditure Limit to \$12,000.
- Moved section regarding procurement files (now “bidding documentation”) here.

Section 6.12 Contractors Files

- Updated the list of documentation required in client files.

Section 8.31 Budget Line Items: DOE and HEAP Contracts

- Added an Equipment/Training line item section

Section 8.55 Landlord Contributions – deleted section

Section 9.21 Special Requirements for Purchasing Vehicles

- Vehicle Purchase Involving a Vehicle Trade-In
 - Revised: A vehicle intended for trade-in must have a minimum mileage reading of 100,000 ~~75,000~~ miles or be 10 years old to be considered for replacement.

Section 9.32 Contract Content Requirements

- Contract Period
 - Revised: Contracts are limited to one year, with a provision giving the agency the option to extend the contract one additional year.
- Licensure Requirements
 - Revised per PN13-01: Contracts must state the type of licenses the Plumbing & Mechanical contractor and/or Electrician is required to maintain. Each contractor must have the appropriate Plumbing & Mechanical License AND Electrical License. If the Plumbing & Mechanical contractor does not have an electrician on staff, then a subcontractor must be named. A separate file must be maintained by the agency.
- Slate Safe Work Practices – deleted section
- OSHA Construction – deleted section
- Safety Data Sheets
 - Revised to reflect new requirements
- Change Orders
 - Revised to explain that items on change orders must be broken out by measure material and labor categories and the total dollar amount of the change.
- Statement of Federal Stewardship – added section
- Site Visits – added section
- Contractor Payment Process
 - Revised language per PN12-03
- Original Invoice
 - Added: Each item must be clearly identified and broken out by measure material and labor categories.
 - Added: ...the invoice must include the following, either handwritten or stamped: company name, address, city, state, zip code, phone number...
 - Warranty
- Added language requiring contractors to offer clients an option for annual inspection and renewal of warranty and service agreement for new heating systems up to 10 years at a cost and water heaters up to 6 years at a cost.
- Contractor Acknowledgement – added section

Section 9.33 Recommended Contract Provisions

- Lien Waivers – added section

Section 9.34 Other Contracting Issues

- Added language regarding contractors having an electrician on-staff or identifying a subcontractor who will perform work requiring a licensed electrician.

Section 10.30 Radon Education – added section

Section 12.10 House Inspections

- Added language requiring that agency responses to house inspection reports are formally written on agency letterhead.

Section 12.20 Administrative Program Monitoring

- Added language requiring that agency responses to house inspection reports are formally written on agency letterhead.

Section 12.30 Fiscal Monitoring

- Added language requiring that agency responses to house inspection reports are formally written on agency letterhead.

Please review the new Policies and Procedures Manual and General Appendix for all changes. If you have any questions, please contact me. The revised manuals will be available on the Members Only website.