

Vision: We will have a healthier and more robust CAP network at the end of the two year Ramp up.



CAPAI Weatherization Ramp Up Meeting Outcomes

March 19th and 20th, 2009

Invitees



Russ Barron

Christine Bayliss

Bev Berends

Rick Burgin

Kary Burin

Mary Chant

Ron Corta

Drew Hall

Deb Hemmert

Dick Henry

Karen Perren

Ken Robinette

Brad Simmons

Raymond Soske

Russ Spain

Larry Stamper

Rich Stelling

Lisa Stoddard

Vicki Jo Terashima

Kevin Viggers

Genie Sue Weppner

Randy Wright

Christina Zamora

This presentation can also be found on the CAPAI Member Portal
at: www.idahocommunityaction.org



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Executive Summary

On March 19th and 20th, CAPAI staff, Idaho Department of Health and Welfare staff, Weatherization Managers, and Executive Directors met to prioritize risks identified at their February meeting. The group also decided their strategy to manage each of the risks associated with the Weatherization Assistance Ramp up project.

Russ Barron, IDHW Division Administrator for the Division of Welfare, and Drew Hall, IDHW Deputy Director for Welfare and Family and Children Services, attended the first morning. Russ stressed the the importance of partnership between IDHW, CAPAI and the Community Action Agencies to achieve our vision. Russ Spain and Lisa Stoddard provided an update from Washington, D.C. Each agency gave a brief update on their preparations, to-date, for the Ramp up. Bev Berends facilitated a discussion about training and procurement. She will continue to be a single point of contact during the Ramp up on these two issues. Raymond Soske, Department of Energy's Office of Inspector General, addressed the group about the risk of fraud.

Each agency developed and presented 30-, 60-, 90-day plans. Weatherization metrics and terminology were reviewed. Incentives were discussed and are considered unnecessary at this time. CAPAI will conduct customer satisfaction surveys at the request of the agencies. Weekly teleconferences will be scheduled until the next face-to-face Ramp up meeting in late May.



Meeting Deliverables



➤ Risk Planning

- ❑ Risk Prioritization
- ❑ Risk management strategy

➤ Create a Ramp Up Project Model

- ❑ Weatherization terms and metrics derived from goals
- ❑ Build 30-, 60- and 90-day plans



Email Protocol for Subject Lines



- ▶ **I: Information**
 - ▶ Situational awareness, no reply or action needed
- ▶ **M: Meeting Invitation**
 - ▶ Reply required
- ▶ **R: Response**
 - ▶ Reply requested
- ▶ **A: Action**
 - ▶ Recipient is required to take action
- ▶ **PI: Priority Information**
 - ▶ Time sensitive
- ▶ **PA: Priority Action**
 - ▶ Action required within three business days
- ▶ **U: Urgent**
 - ▶ Action required within 24 hours



Weatherization Terms and Metrics



- ▶ Meet customer service standard
 - ▶ As stated in the contract and customer satisfaction survey results
 - ▶ Meet quality of work standards
 - ▶ Standards and Techniques section of the Idaho Weatherization Operations Manual (IWOM)
 - ▶ Reduce Auditor/Inspector Certification time requirements to align with ramp up
 - ▶ Baseline: 2 Auditors certified under current program
 - ▶ Requirement: One year employment and 6 months apprenticeship
 - ▶ Option: Building Performance Institute?
 - ▶ Develop standards and training for all four program levels
 - ▶ Crew/Installer
 - ▶ Crew Supervisor
 - ▶ Auditor/Inspector
 - ▶ Weatherization program manager
 - ▶ Current training: Peer-to-peer review, Saturn online class/test, IWOM
-



Weatherization Terms and Metrics



- ▶ Increase program awareness in community and potential participants
 - ▶ Partner with Utilities, Low income agencies and IDHW Regional Directors
 - ▶ Public Service Announcements and print media
 - ▶ Agency internal staff and website
 - ▶ Town hall meetings (with mayors) in small towns
- ▶ Improved communication and information sharing process
 - ▶ IDHW, DOE, CAPAI, six CAA districts, Utilities as appropriate, PAC, NCAF, NASCSP, Public speaking about weatherization services
- ▶ Define expectations of partner roles
 - ▶ TAT on reimbursements and avoid surprises
- ▶ Meet federal standards
 - ▶ 10 Code of Federal Regulations 440 – Weatherization
 - ▶ Grant guidance
 - ▶ CFR 600
- ▶ Meet state standards
 - ▶ IWOM and contracts



Weatherization Terms and Metrics



- ▶ Increase number of units (residences)
 - ▶ Apartments, Mobile homes, Homes
 - ▶ Baseline: tracking number of households, number of individuals
- ▶ Increase trained labor force
 - ▶ Intake, Inventory and four program levels
- ▶ Increase per unit investment
 - ▶ Baseline is \$2966; tracking system unable to separate LPW from DOE
- ▶ Ensure sufficient availability of contractors qualified to weatherize homes
 - ▶ Bid process; contracts for service
- ▶ A timely decision and implementation of a capable data tracking system
 - ▶ DOE wrote up IDHW for WITS; requirements analysis underway
- ▶ Decrease DHW turnaround time on dollars spent to provide adequate funding availability
 - ▶ 2008 DOE average TAT = 15 days (Range 5 to 24 days)
 - ▶ 2008 LPW average TAT = 14 days (Range 6 to 22 days)



Weatherization Terms and Metrics



- ▶ Maintain WX best practices through ramp up
 - ▶ Track Audits, Completed, Inspected production

Baseline and ongoing metric requirements from WAP:

- ▶ Your employees – including intake and fiscal – covered by all funds for weatherization, expressed as # of people and # of full-time equivalents
 - ▶ This includes utilities, BPA and LPW; it is not contractors
 - ▶ Fiscal personnel at agencies who use indirect cost rates
- ▶ Number of workers who received any formal training funded by the program in the past 12 months (conference/workshops/training courses/onsite trainers other than supervisors)
 - ▶ For contractors, connect training to work being contracted for; no contractor training in last 12 months; outside source; not Health and Safety and not Train the Trainer





Risk Prioritization – Top 26*

Risk Circumstance	Consequences	District	Probability	Negativity	Decision
TAT on reimbursements	Lose vendors and contractors	All	H	H	AV
Blending and managing multiple funding streams/time periods	Confusion; don't spend out utility funding; stimulus standards not accepted by utilities; loss of other funds	All	H	H	AV
Not sharing issues and challenges with each other	Festering; find out from the Governor's office or another agency (Not sure what the consequences are and losing control of the resolution; perception of failure)	All	H	H	AV
Inspector/Auditor Certifications	Inspection backlog and unidentified bad work; delays in the system and to rapid learning cycles	All	H	H	AV

H = High
 M = Medium
 L = Low
 AV = Avoid
 R = Reduce

* Decision is "Avoid" and/or Probability and Negativity are "High"

Risk Prioritization



Risk Circumstance	Consequences	District	Probability	Negativity	Decision
Key position bottleneck	Paid labor who can do the work but are waiting for Auditor/Inspectors	All	H	H	AV
Not enough applicants	Don't spend the money and don't meet production goals	All	M	H	AV
Lack of upfront planning	Blown timeline and consistency not achieved	All	L	H	AV
Agency: Contract for Services	Inadequate oversight and quality control; how they represent CAPAI	All	M	H	AV
Goals not met	Lose credibility and Community Action justification	All	M	H	AV
Information is filtered	Distrust; inefficiency when spend time doing their own discovery work	All	L	H	AV
Constraints: DOE/LPW mirror contracts	Can't take advantage of the flexibility in the LPW funding	All	L	H	AV
Advance payments	Not spending stimulus out quickly; money is sitting in agency coffers	All	L	H	AV

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Risk Prioritization



Risk Circumstance	Consequences	District	Probability	Negativity	Decision
No Automated system	Lack of data integrity; inability to monitor actual spend and production; opportunity to lose funds	All	L	H	AV
No early problem identification and resolution	Embedded problems grow and disrupt production and blindsides stakeholders	All	L	H	AV
Production goals do not increase over time	Production remains flat; no gains due to increased quality and training	All	L	H	AV
Standards	Difficult to establish quality requirements for training; difficult for staff to communicate with each other and the customer; unmet customer expectations	All	L	H	AV
Phone system	Slows the Weatherization coordination activity	Not SEICAA; CAP; CCOA	L	M	AV
Inconsistent messaging	Community backlash; differing expectations across agencies and confused potential contractors	All	H	H	R

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Risk Prioritization



Risk Circumstance	Consequences	District	Probability	Negativity	Decision
Contractor Relationship	Inadequate oversight and quality control	All	H	H	R
Contrators: Private sector expectations	TAT on invoicing; not using as many contractors as expected	All	H	H	R
Inadequate equipment	Can't meet production; consistency quality and possible health and safety	All	H	H	R
Price vs. SIR [FOLLOW UP WITH ALEX MOORE]	Ineligible if cost is too high	All	H	H	R
Criminal background	Reduced hiring pool/Insurability	CCOA; El-Ada	H	H	R
Pay scale Not an issue, unless Davis-Bacon	Reduced hiring pool and potential job jumping	All	H	H	R
Access to training	Out-of-state, inability to create jobs, lack of consistency	All	H	H	R
Length of time	Delays in production	All	H	H	R

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CAPAI Weatherization Ramp up Rolling 90-day Plan

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Agency: NECAA

Plan	30 Day	Status	Comments	60 Day	90 Day
Purchase 2 trucks	Complete bid process	●	Bid process completed and vendors identified	Select vendor and submit invoice	Purchase vehicles and license
Training for 6 crew	Post positions and conduct interviews	●	First round of 4 interviews completed; second and final round planned for next week	Hire crews and enroll in training	Training on schedule
<h1>Example</h1>					



On track



Slipping



Missed

Meeting Assessment



▶ What went well

- ▶ Ability to be exposed to lots of experience
 - ▶ Increased confidence; yes we can
 - ▶ Solved high priorities with everyone in the room
 - ▶ Clear picture of IDHW role and obligation to success
 - ▶ Everything on the table
 - ▶ Bev Berends to facilitate procurement
 - ▶ Everyone has the same information
 - ▶ Sharing issues and challenges
 - ▶ Leave personalities out and focus on system/processes
 - ▶ Respect for sharing weaknesses in the system
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▶ What didn't go well

- ▶ Risk assessment took a long time
- ▶ Process can be frustrating for those who want to hit the ground running; most people in the room are “doers”
- ▶ Crowded room
- ▶ Technical difficulties with projector
- ▶ Round table would make it easier to see each other
- ▶ Needed hard copies of presentation

