

Cultivating an Engaged and Effective WAP Network



WINTER CONFERENCE



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Cultivating an Engaged and Effective WAP Network

- Why is this important?
 - The important and expected outcomes of the WAP
 - The WAP is a team effort – no one entity does it alone
 - Low-income households need our best effort
 - The Grantee is best suited to take the lead
 - Supports continued success of the WAP

Cultivating an Engaged and Effective WAP Network

➤ Notice the definitions:

➤ **Cultivate**

- Try to acquire or develop
- Synonyms
 - Improve, better, refine, elevate, educate, train, develop, enrich, etc.

➤ **Engaged**

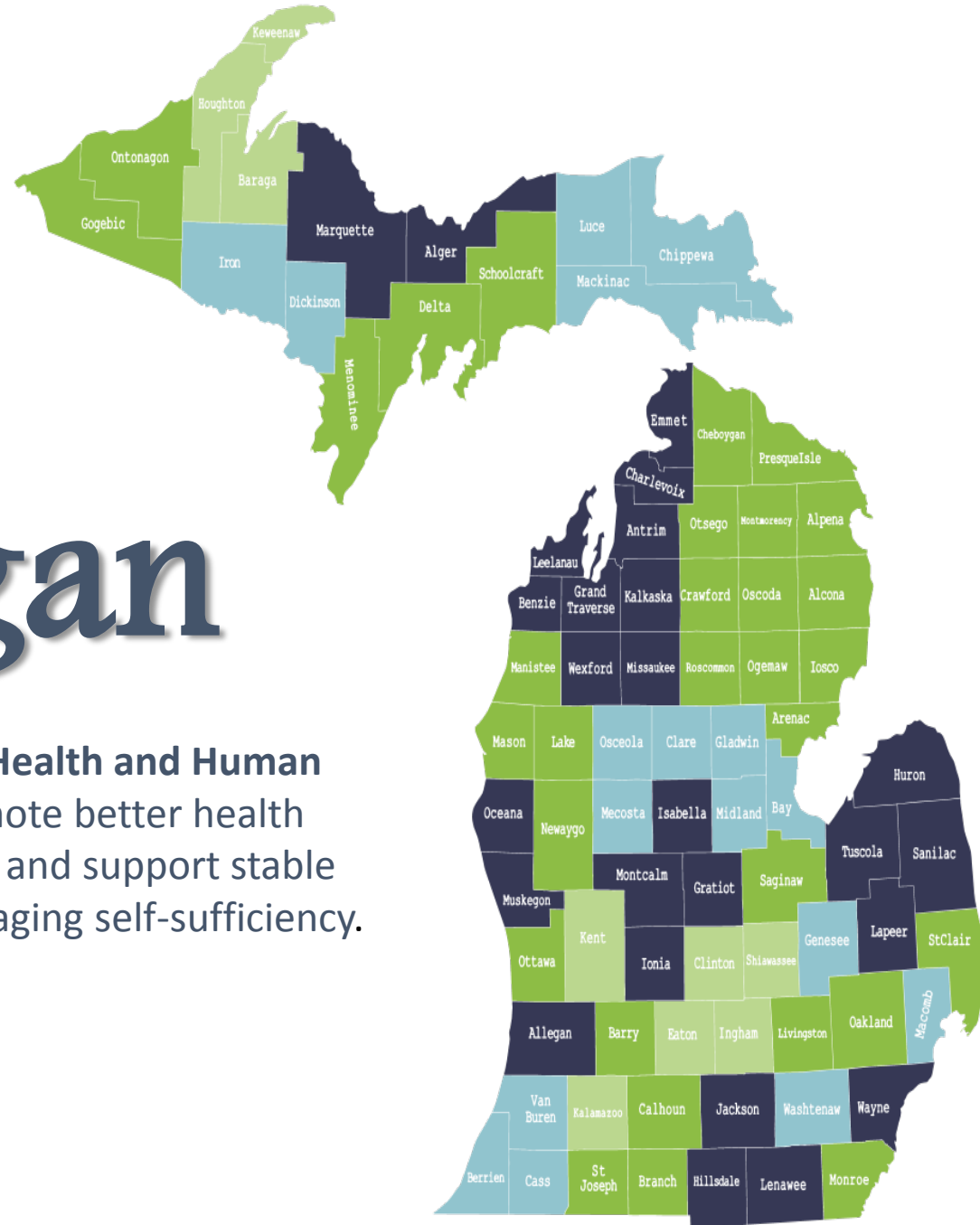
- Busy, occupied
- Engage in: participate or become involved in

➤ **Effective**

- Successful in producing a desired or intended result
- Fulfilling a specified function
- Synonyms
 - Successful, potent, powerful, helpful, beneficial, advantageous, valuable, useful, impactful, valid plausible, lucid, etc.

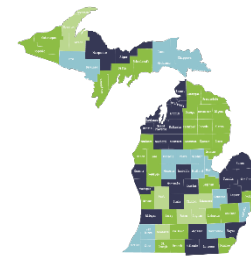
Michigan

The Michigan Department of Health and Human Services (MDHHS) strives to promote better health outcomes, reduce health risks, and support stable and safe families while encouraging self-sufficiency.





Michigan



CSBG	\$ 25,895,905
WAP DOE	\$ 15,282,760
WAP LIHEAP	\$ 7,000,000
Energy Assistance	\$ <u>10,000,000</u>

Annual Budget: \$ 58,178,665



Number of Low-Income in State
Total Population: 9,678,203
Households in Poverty: 1,616,870
Percent in Poverty: 16.71%



Community Services Block Grant
LIHEAP & DOE Weatherization
Energy Assistance Program
School Success Program



Across the 83 counties:
29 Community Action Agencies
29 Energy Assistance Providers
26 Weatherization Providers



State Plan Development and Implementation
Grants Management
Policy Development
Monitoring: Programmatic, Financial & Organization Standards
Training and Technical Assistance

Cultivating an Engaged and Effective WAP Network

Cultivating an engaged and effective Weatherization network

- Can achieve **commitment** from the Weatherization network for change and improved performance
- Can build a culture that can **adapt to ongoing changes** in challenging environments
- Can **meet and exceed goals** and expectations

To cultivate an engaged and effective WAP Network

- **Observe and Evaluate** the current condition of the Weatherization Assistance Program
- Provide Leadership through the establishment and implementation of a **vision and goals**
- **Develop a Leadership Plan**
 - Set **clear expectations** to meet the goals
 - Define **roles and responsibilities**
- Implement Leadership Plan
 - Communicate your vision and plan
 - Create a **trusting** environment
 - Encourage Weatherization network **growth, development, involvement, and collaboration**
- Continuously raise the bar by **encouraging higher performance** from the Weatherization managers, from teams, and from the Weatherization network.

Develop a Vision Statement

Your Weatherization Assistance Program vision is important, it is the starting point for change, improvement, and for something great to happen.

A vision is your big picture of the way things ought to be. It is your billboard image of what you are working towards.

Steps in developing and communicating a vision.

1. Observe and Evaluate your Weatherization Program
2. Develop a vision for your Weatherization Program
3. Develop a Leadership Plan and communicate the details
4. Communicate your Vision and Leadership Plan to others
5. Build a coalition of supporters for the vision



Observe and Evaluate your Weatherization Program

1. Observe and Evaluate your Weatherization Program

In order to determine a vision, you must become a perceptive observer of the weatherization network. Immerse yourself in watching, listening, and wondering. Pay attention, ask questions, probe, discuss, and gather information.

- Identify what is working and what is not working
 - In the State Office
 - In the Weatherization Network
- Review
 - ACSI survey results
 - Monitoring Reports/Risk Assessments
 - Reports
 - Production and expenditure goals
 - Most attended trainings and Least attended trainings
 - Inventory data
 - Complaints
- Feedback
 - Surveys
 - Training Evaluations
 - Talking with Weatherization Managers
- Develop solutions to correct the weaknesses identified



Develop a Vision Statement

2. Develop a vision for your Weatherization Program

Take time to **think** about everything you learned through the **evaluation process**, specifically identify all the ways things could be **better** in the weatherization program.

If you put together all the pieces of how things should be, you have an **overall vision**.

A hallmark of great leaders is that their vision includes **big ideas**. Big ideas get people excited.

A vision statement can show the Weatherization Network opportunities for change to improve performance, ensure high quality services, and provide program consistency.



Develop a Leadership Plan

3. Develop a Leadership Plan and communicate the details

After you test and reshape your Weatherization vision, you should develop a **Leadership Plan**. You need to give people some **specifics as to what your vision will mean** on a day-to-day level. You also have to tell people what **steps** you will take to get there.

You don't have to have all the answers, but you need to have some ideas. Write up some tentative ideas for how to get things done. **The better your plan for reaching your vision, the more likely people will take you seriously and be willing to follow your lead.**

Develop a Leadership Plan

3. Develop a Leadership Plan

- Set **clear expectations** to meet the goals set forth in the vision statement.
- Develop a **Leadership Team** to reflect on the work and adjust to changing conditions.
 - Define roles and responsibilities
 - External Leadership Team – advisors, advocates, champions, change agents
 - Internal Leadership Team – organizing, planning, tracking projects
 - Subcommittees – clear expectations on tasks/deliverables, objectives, how work relates to vision, time lines
 - Carefully spelling out the approach of the teams is essential, but leaving the roles of individuals within the team vague will encourage people to share ideas and contribute in multiple dimensions.
- Identify **strategies** needed to achieve the goals.
- Outline **action steps** or mini tasks to move towards the achievement of a strategy. (Easy Short Term Wins/Successes can keep people engaged, vested, and motivated.)
- A leader is far more powerful and effective when he or she gets up to speak on the vision. The **speaking engagements must be scheduled**. It does no good to create a vision without a plan to speak about it in many venues over a period of time. It takes several repetitions for most people to truly hear and remember the message.

Communicate your Vision and Leadership Plan

4. Communicate your Vision and Leadership Plan to others

Why communicate your vision to others?

Because no one can decide to **follow you** until they know **what direction** you're headed in.

If your vision is one that touches a chord with many people and if you can communicate it well, **people will join you** in reaching towards your goals.

Sharing a vision is a central role of a leader

A vision gives people a **bigger picture** of what things can be like. It helps people **raise their hopes and expectations**; it **inspires** them. **When people are inspired, they are more likely to work on something.**

When do you need to communicate your vision?

All the time. Whenever you talk to people about Weatherization, tell people what you are working towards. The more you do it, the better you will get at it, and the more people will be willing to support you.

Communicate your Vision and Leadership Plan

4. Communicate your Vision and Leadership Plan to others
The right type of communication is vital to keeping people engaged and motivated.

Approach to Communicating your Vision (Email vs Face-to-Face)

- Email is a necessary and invaluable communication vehicle, but it is one-way. When you use email, it's going to be much more difficult to convey your authenticity, your concern, and your vision. It's also going to be very hard to have real dialog with your Weatherization Network, as so much is lost when we take away the inflection, emotion, body language, and facial expressions that we can read and react to in a face-to-face meeting or on a videoconference.

Create a **trusting** environment

- Face-to-face communication is the gold standard. All communication, to be effective, should be predictable and consistent to build trust and get people tuned in and "turned on" to critical Weatherization goals.
- Reach out personally and directly to the Weatherization Network. In this day and age, they expect you to be accessible.
- Leaders should have high ethical and moral standards, provide vision/goals/objectives, set clear expectations, have strong interpersonal skills to manage own emotions and emotions of others, know how deeply to engage Weatherization Network and get them excited about a shared purpose and be authentic/trustworthy.
- Stay out front when an issue arises. People are more willing to forgive if you've acknowledged a problem and are working to fix it.

Communicate your Vision and Leadership Plan

4. Communicate your Vision and Leadership Plan to others

7 steps for overcoming communication barriers by assessing and improving your communication plan:

- Define all the audiences. You may find you've been inadvertently neglecting people.
- Document all the ways you currently communicate to each audience on a regular (not ad hoc) basis. Write down state association meetings, conferences, webinars, quarterly meetings, lunches, or program meetings, even emails, website, phone calls, and electronic newsletters.
- Create a spreadsheet that captures each type of communication, by audience. This is a snapshot of your current communications plan.
- Identify the challenges you have in communicating with each audience. Challenges might include certain audiences never seeming to "get the message," seeming disengaged, or are hard to reach directly because they're always on the road.
- Identify the types of communication that work particularly well. For example, after sending a personal note, you've noticed that an employee or weatherization manager seems warmer to you, or more engaged.

Look at your communications snapshot in light of the challenges and successes you just identified. Are you not communicating enough to certain audiences? Do you have too many meetings or too much written communication for some and not enough for others?

Build a Coalition of Supporters

5. Build a coalition of supporters for the vision

Help people take ownership of a vision

As a leader, you have to help people take your Weatherization Vision and make it their own. This is an important step in bringing people together to **work toward a common goal**. Members of the WAP Network need to have a **shared Weatherization vision and a sense of ownership** in order to be committed to the WAP Network.

To help people take your vision and make it their own, **you need to talk and listen**. You shouldn't talk too much. You should **mostly listen to people's thinking**. People will tell you **what is most important to them**.

People who communicate a Weatherization Vision of what things should be like also state **what is obviously wrong and unreasonable**. However, once you say it, people will see that it is true and they will see that you understand the current conditions of the Weatherization program.

You should also be prepared for people that are not pleased with you for what you are trying to do. **Ideas that lead to fundamental changes are frightening to people**. Gather your allies around you to defuse negativity.



Michigan

**Weatherization Assistance Program
Change Vision Process**

Michigan Weatherization Program's Evaluation

ACSI Report shows the following results

Lowest score:

- 50% Development of the DOE State Plan

BCAEO should focus on high impact areas

- 71% Communication
 - Improve clarity of communications
 - Frequency of communications
- 70% Technical Assistance
 - Improve clarity and consistency of assistance
 - Improve timeliness of receiving requested information

Other Areas for Improvement

State Office:

- High number of vacancies
- Lack of Leadership
- Silo work practices in weatherization
- Email main mode of Communication
- Weak Weatherization Management knowledge

Weatherization Network:

- Inconsistent work practices
- Limited to no use of the Field Guide/SWS
- Lack of a strong in-state training program
- Lack of Collaboration
- PAC not fully engaged
- Poor access to policy manuals
- Statewide database system outdated

Michigan Weatherization Change Vision



Weatherization Program Excellence
High Performance and Quality Work Practices
through Collaboration and Communication



Michigan Weatherization Change Vision

We want to take Michigan's Weatherization Assistance Program to the next level by improving **program performance and quality**, **expanding and enhancing support** from the State Office, and **creating and maintaining a training program** that includes a **state-of-the-art training facility** in Michigan.



Michigan Weatherization Leadership Plan

The change vision includes the following focus areas:

- Training and Technical Assistance expansion and enhancement
- Reorganization of the State Weatherization Office
- State monitoring stabilization and growth
- Stronger collaborations with partners to assist in the rebuilding efforts
- Comprehensive communication plan

To accomplish our goals in each of the focus areas, we created small functional teams including national, state and local partners. Projects include selecting and updating a new Michigan Field Guide, setting up an IREC accredited training center, developing and implementing a new online training platform, streamlining the State Office policies and procedures, and executing the current training plan while the Leadership Team plans for future enhancements identified in the change vision.



Michigan Weatherization Leadership Plan

Establishment of the Weatherization Leadership Team:

- An external stakeholder Weatherization Leadership Team was assembled
 - Kick-Off Meeting Held in October 2017
- The team consists of the National, State, and Local partners
 - 8 Individuals from Community Action Agency's Weatherization Managers
 - 3 Out-of-State Weatherization Technical Trainers
 - 3 In-State Weatherization Technical Trainers
 - 1 National Partner
 - 7 Individuals from the State Weatherization Office
- Team meets every other month to discuss the progress of the change vision, give feedback on the next steps, plan for future action steps to accomplish change vision strategies, and advocates for the change vision within the Weatherization Network.
- Sub-committees have been formed that include additional volunteers from the network



Michigan Weatherization Leadership Plan

Goal: Establishment of the Michigan Weatherization Training Center as an IREC Accredited Training Facility offering courses in Energy Auditor, Quality Control Inspector and Retrofit Installer

Training and Technical Expansion and Enhancement:

- Michigan Weatherization Training Center
 - Planning
 - Funding for FY18 is committed
 - Funding for FY2019 is being processed
 - Training Center Implementation Plan prepared
 - Training Center Organizational Chart prepared
 - March 2018 a Training Director will be hired
 - April 1, 2018 start date
- Training Sites
 - Plainwell, Michigan
 - Highland Park (Detroit), Michigan
 - Middle of Michigan (Pending)
 - Upper Peninsula (Pending)
- Job Task Analysis (JTAs)
 - Energy Auditor
 - Quality Control Inspector
 - Retrofit Installer



Michigan Weatherization Leadership Plan

Goal: Expanding and Enhancing support from the State Office

Reorganization of the State Office:

- State Office Staffing – hiring vacant positions, building a strong internal weatherization team, preparing for upcoming training for staff, sending staff to conferences, updating QCI certifications
- Weatherization Priority Areas
 - Development and Implementation of the DOE State Plan
 - Training and Technical Assistance Plan
 - Health and Safety Plan
- Performance Improvement
 - Policy Manuals and Procedures – Review, Update, and Train
 - Streamlining/Updating Tools including the Statewide Database
- Michigan Field Guide
 - New Base Guide Purchased
 - Michigan review team consists of 12 volunteers from the network



Michigan Weatherization Leadership Plan

Goal: Expanding and Enhancing support from the State Office

State monitoring stabilization and growth:

- Hire Weatherization Technical Monitoring Staff
- Make sure Weatherization Technical Monitoring staff has the QC Inspector Certification
- Ensure all State and/or Weatherization Technical Monitors have expertise and knowledge in the new Michigan field guide that is aligned to the National Standard Work Specifications (SWS)
- Review and update the Electronic Statewide System monitoring tool to ensure accurate monitoring report is developed for each inspection that is understood by all agency staff.
- Review and update monitoring tool based on new health and safety guidance, new Michigan field guide, and new policy (CSPM and TWP) updates.
- Provide continuous updates to the agency's Weatherization Managers on common findings and best practices in Michigan



Michigan Weatherization Leadership Plan

Goal: Improving the Weatherization Assistance Program performance and quality

Stronger collaborations with partners to assist in the rebuilding efforts:

- Implementing the Weatherization Change Vision utilizing a collaborative framework
Weatherization Leadership Team (every other month) – Face-to-Face Meeting
- Weatherization Managers Regional Roadshow Meetings (quarterly) – Face-to-Face Meeting (4 regions)
After each meeting, staff notes are reviewed, action steps are reviewed and updated, new initiatives are considered.
 - Review the dynamics of the participants
 - A Weatherization Leadership Team member is assisted to a region
 - Review the participants interactions, readjust the regional meeting make-up to reduce negativity and promote collaboration and change
- Development of the DOE State Plan Workgroup (as needed) – (3 meetings held, 1 to 2 more will be scheduled)
- Policy Advisory Council (quarterly – Face-to-Face 1 to 2 times per year)
- Monthly Weatherization Management Webinars
- Two Conferences; Weatherization Manager Track at the Summer Conference and a Weatherization Technical Conference in the Fall

Questions





Cultivating an Engaged and Effective WAP Network

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March 2, 2018



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COLORADO
Energy Office

Keys to an Engaged and Effective Network*

- Get Your Own House In Order
- Establish Who “Wags” Whom
- Establish Guidelines (Turf)
- Create the Atmosphere for Partnerships
- Work Together on a Defined Goal

Get Your Own House In Order

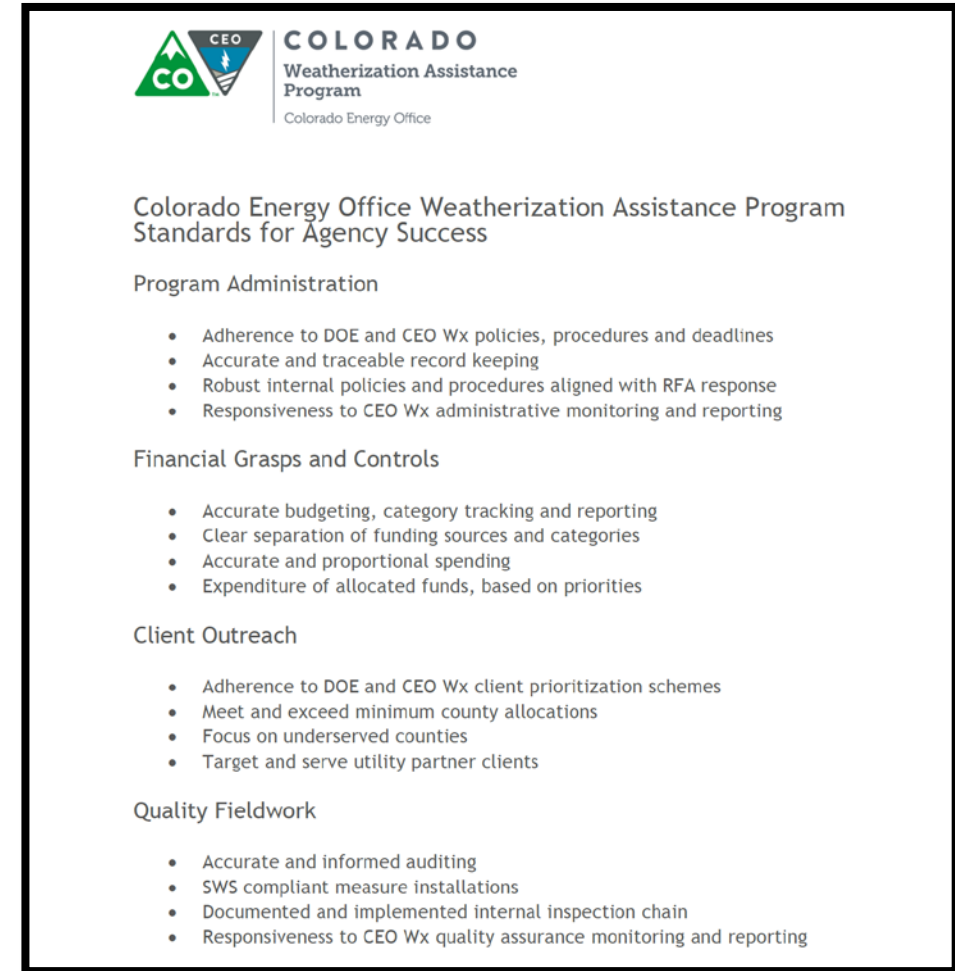
- Finances First
- Policy & Procedure
- Procurement
- Technical Requirements
- Compliance

Establish Who “Wags” Whom

- DOE > State > Sub-Grantee > Sub-Contractor
- DOE State Plan is the State Policy Position (State Determines Direction)
- Funding Relationship is to Meet State Policy Goals
- Data is the Driver for Decision Making

Establish Guidelines (Turf)

- Set Clear Guidelines on Roles
- Define Boundaries
- Questions Over Statements on Others Turf
- Stick To It



Create the Atmosphere for Partnerships

- Meet to Conduct Business and Socialize
- If You Ask for Something, Give Something
- Recognize Limitations
- Work Together



Work Together on a Defined Goal

Goal: Reduce Energy Burden

$$\text{Energy Burden} = \frac{\text{Annual Energy Expenditure}}{\text{Annual Income}}$$

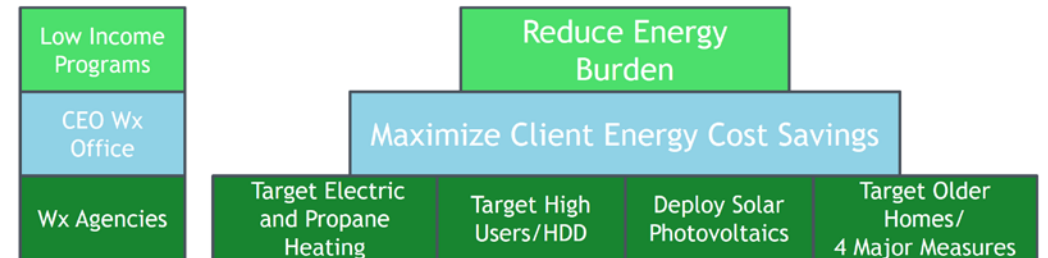
Reduction in
Annual Energy
Expenditure



Reduction in
Energy Burden

Maximize energy cost savings for EACH client

Multi-Tier Client Savings Approach





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