

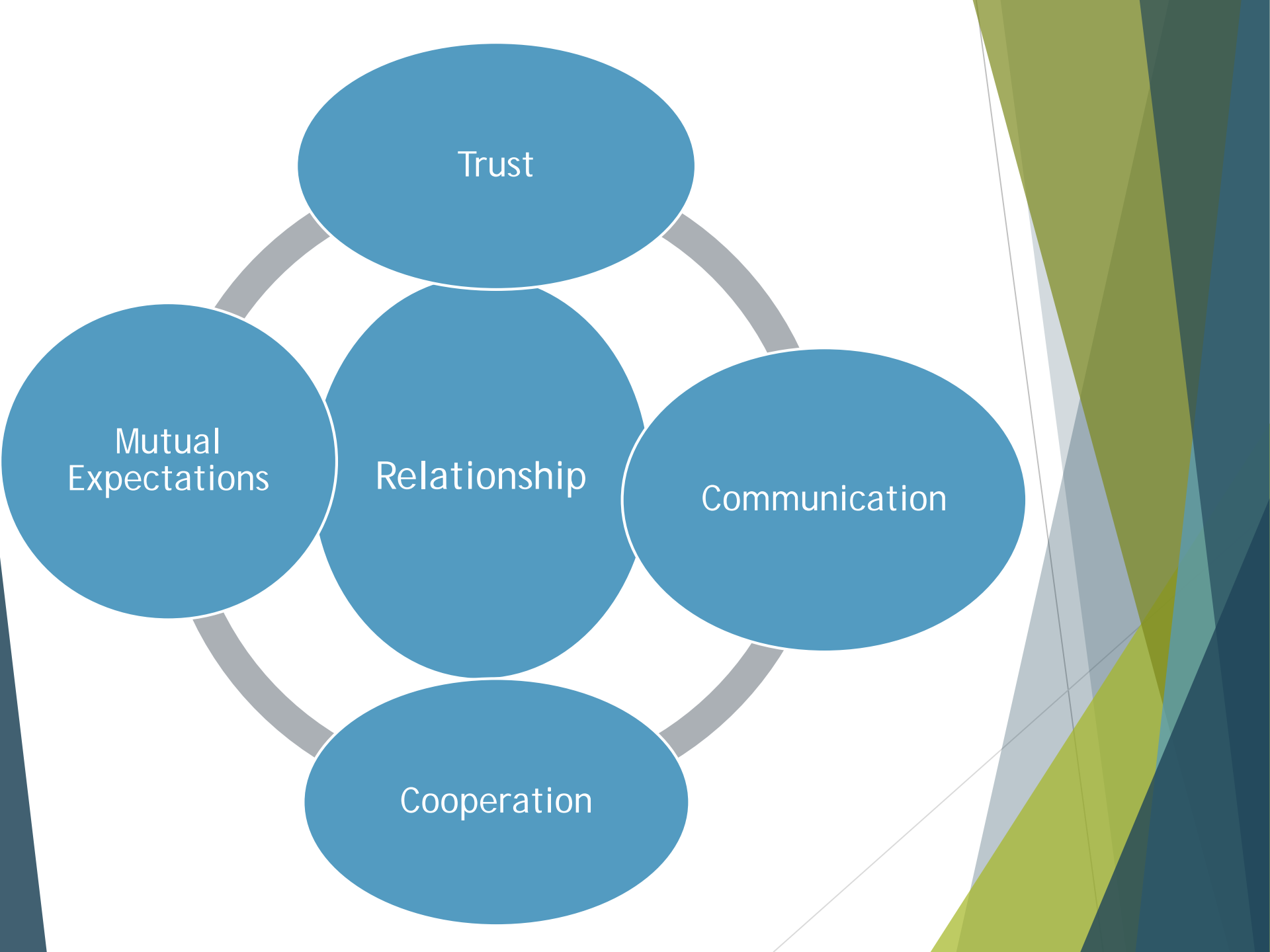


NATIONAL ASSOCIATION FOR STATE COMMUNITY SERVICES PROGRAMS

Ray Judy & Amy Klusmeier

Grantee & Sub-grantee Relationship

- ▶ Why is this relationship important?
- ▶ What are the characteristics of a good relationship?
- ▶ What are the risks of not developing a good relationship?
- ▶ How is your Grantee to Sub-grantee relationship?



Necessary Elements

▶ Communication

- ▶ Two-way
- ▶ Effective
- ▶ Thoughtful
- ▶ Focused
- ▶ Open

Necessary Elements

▶ Cooperation

- ▶ Same goals in mind
- ▶ Understand roles & responsibilities
 - ▶ Not completely the same
- ▶ Each willing to fulfill their responsibilities

Necessary Elements

- ▶ Mutual Expectations
 - ▶ Fulfilling responsibilities
 - ▶ Fulfilling agreements
 - ▶ Dependability
 - ▶ Commitment

Necessary Elements

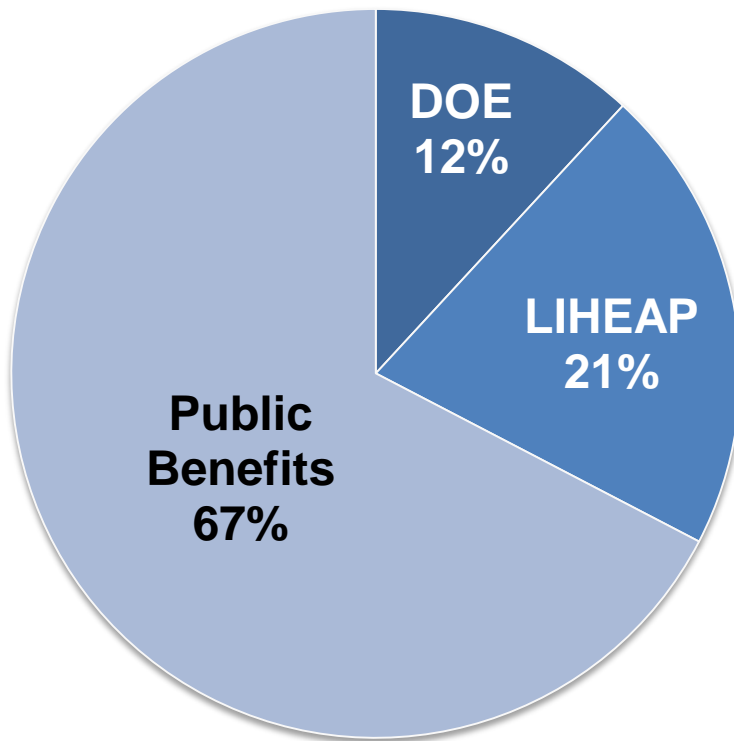
▶ Trust

- ▶ Must be mutually earned
- ▶ Based upon understanding each others roles
- ▶ Loyalty
- ▶ Interaction
- ▶ Responsiveness
- ▶ Mutual support

Program Funding & Production

State Fiscal Year (SFY) 2017

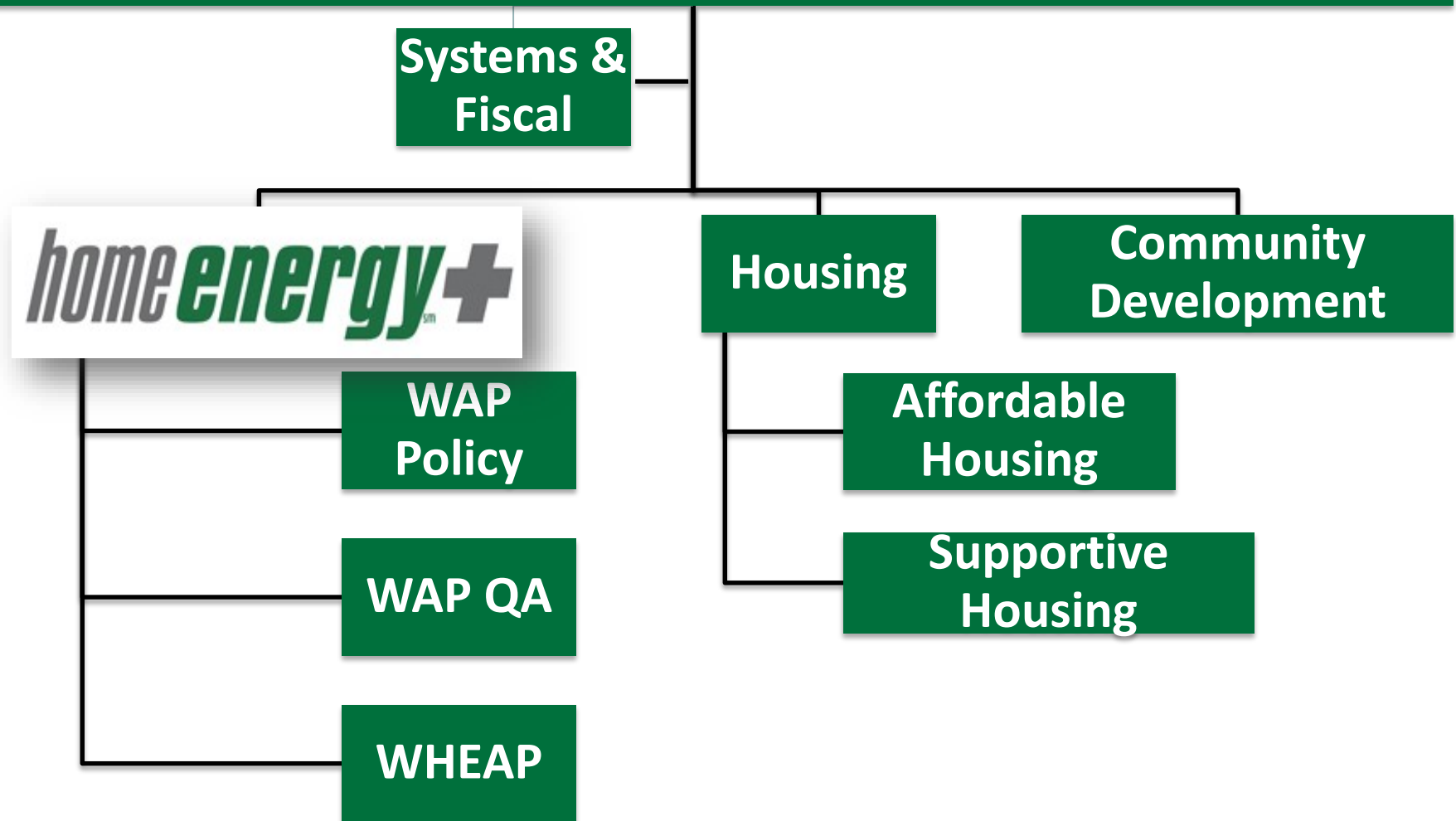
\$55.6 Million Allocation



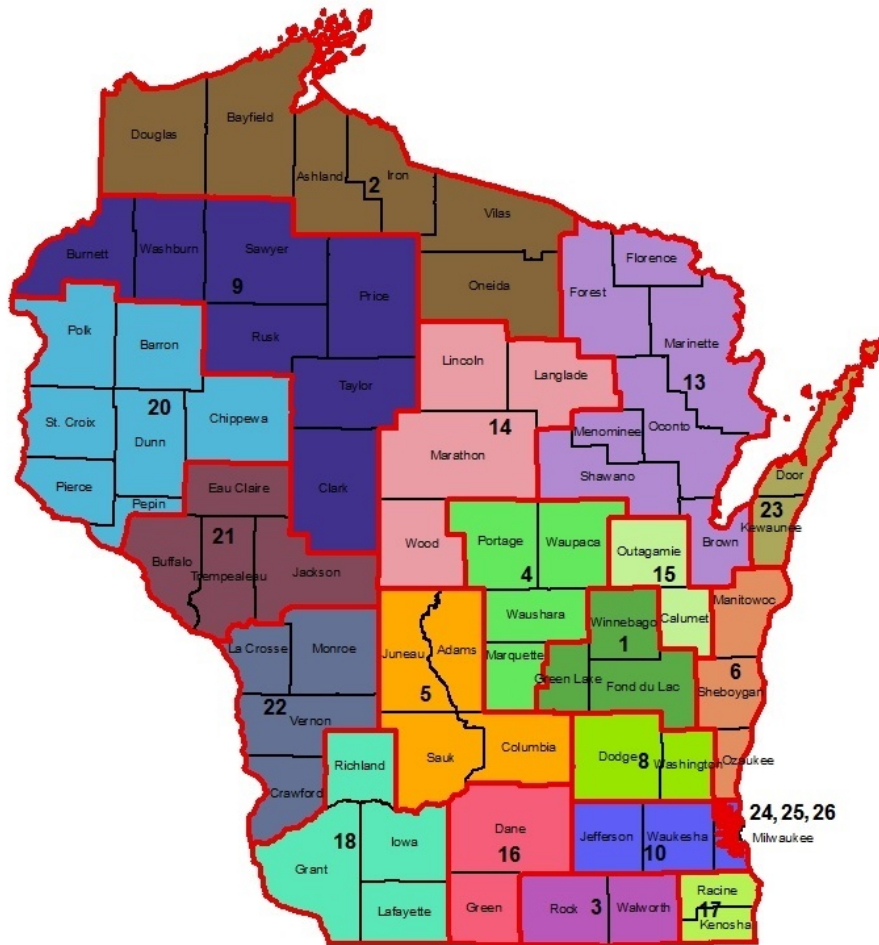
Production Goals

Total Units	5,608
DOE Units	787

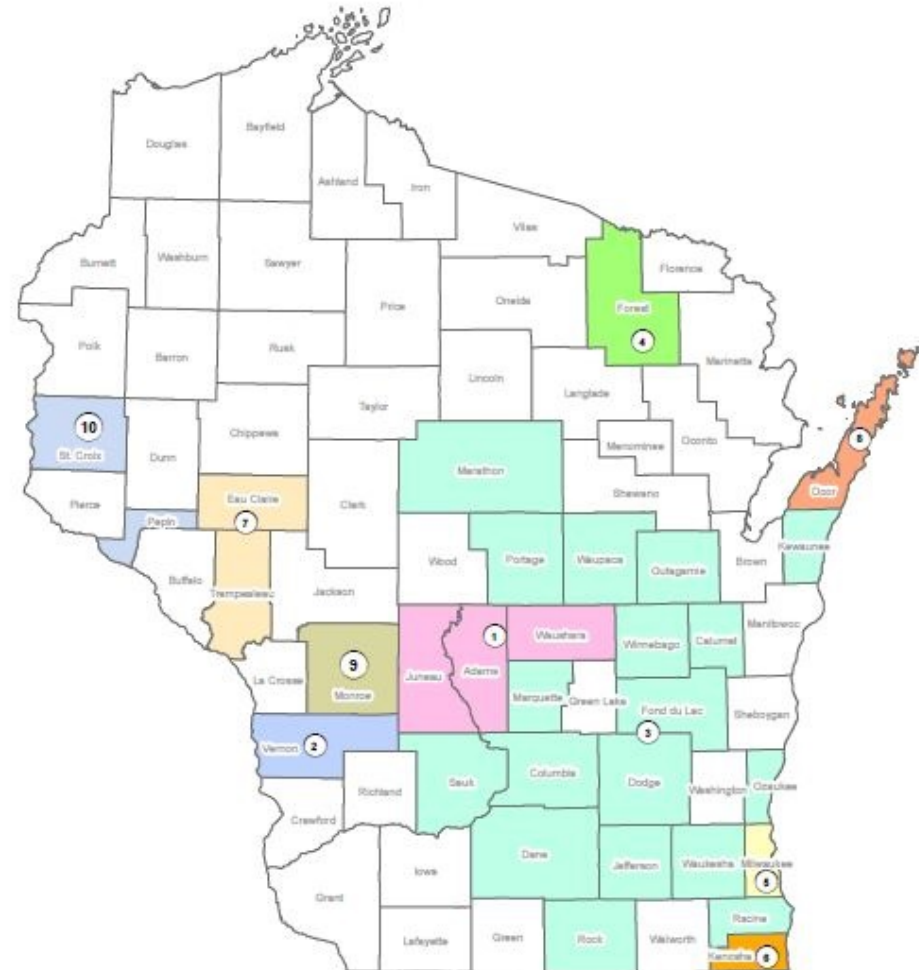
Division of Energy, Housing and Community Resources (DEHCR)



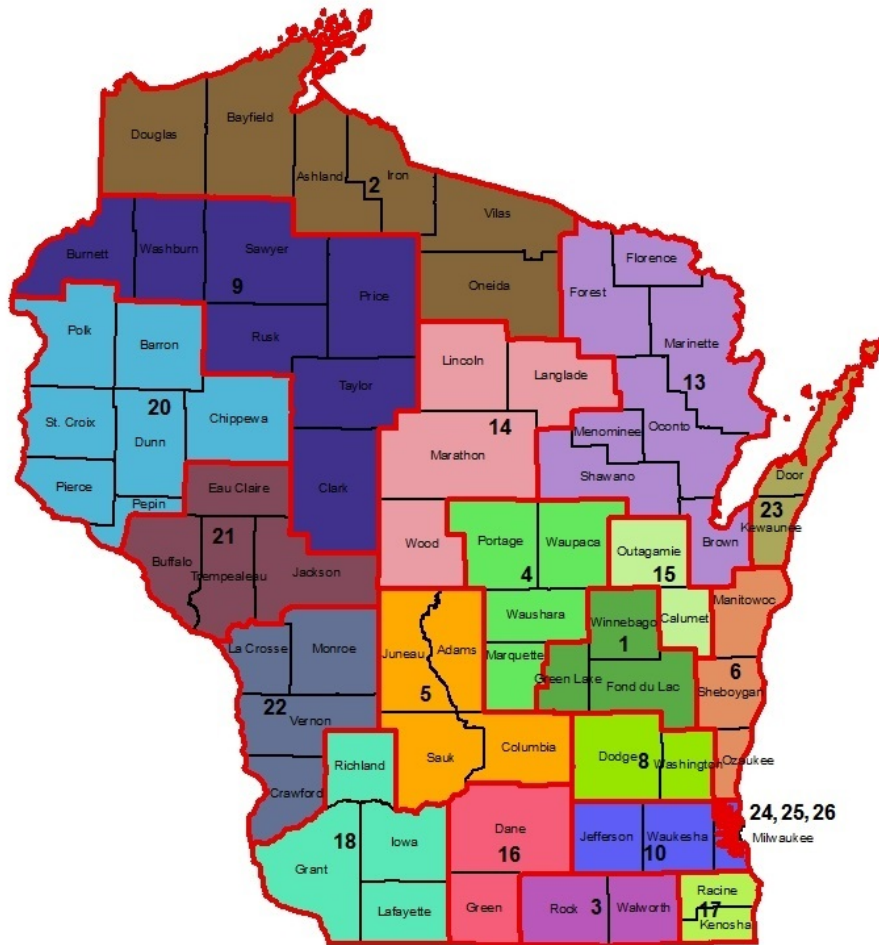
Weatherization Providers



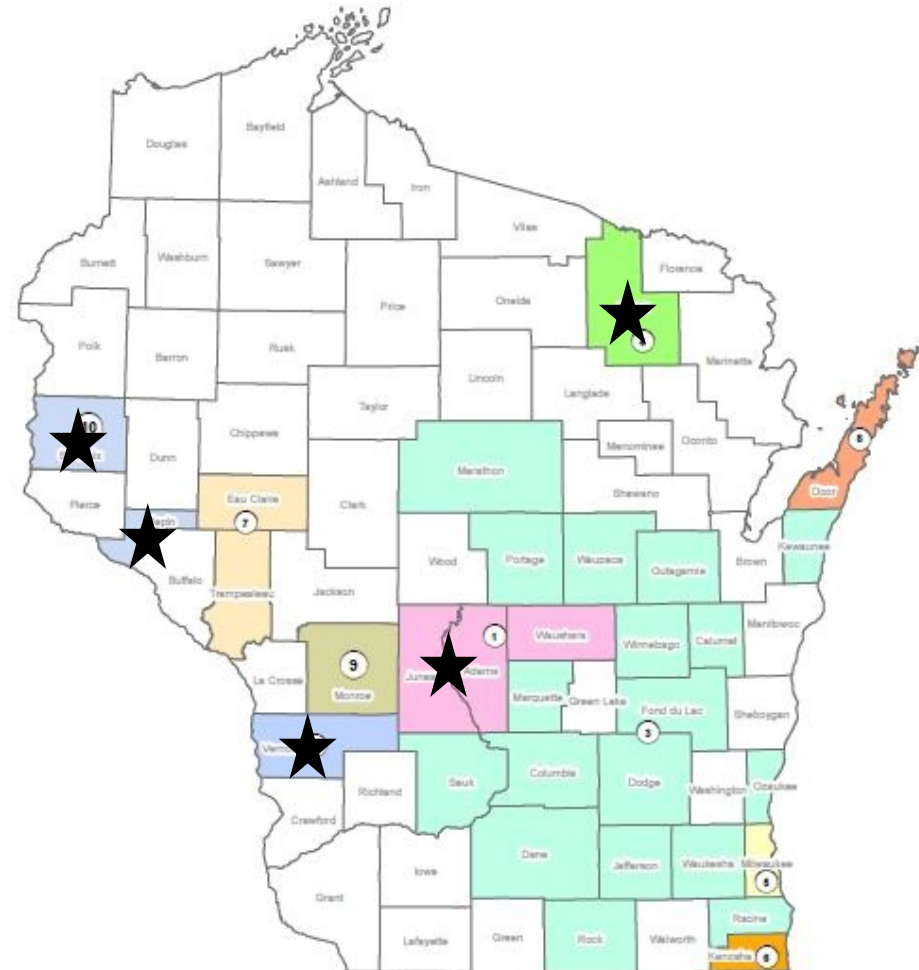
WHEAP Providers



Weatherization Providers



WHEAP Providers



WisWAP Network

Grantee: Division of Energy Housing and Community Resources (DEHCR)

- Sub-grantees: Weatherization Operators of Wisconsin (WOW)
- T&TA Contractor: Wisconsin Energy Conservation Corporation (WECC)
 - Subcontractors: Seventhwave, specialized trainers

Other Partners: WisCAP, utility associations, WHEAP agencies, low-income advocacy orgs., elected officials, state/local government

Mutual Expectations



Program Documents

The Wisconsin Weatherization Assistance program mission is to reduce energy costs for eligible low-income households by improving the energy efficiency of their homes while ensuring their health and safety.

Achieving the **primary goal of energy efficiency** is dependent on effective program management that strives to maximize energy savings, minimize production costs, improve program management and quality of work, and reduce the potential for waste, fraud, abuse and mismanagement.

Budget Planning

Contract Planning Workbook

Job Title	Annual Work Hours	Annual "Non-Wx Programs" Hours	Expected PTO used (hrs.)	Holidays (hrs.)	Annual Wx Staff Meetings (hrs.)	Annual Wx Training (hrs.)	Annual Wx Admin (hrs.)	Annual Program-Support (hrs.)	Non-Measure Operations (hrs.)	Available Production Hours	Non-Measure Hours (per-day amounts)			Available Measure Hours
											Transp.	Set-Up	Other	
											2	1.5	1	
Director	2,080	200	232	112	10	50	738	738		-	-	-	-	-
Admin Assistant	1,664	60	179	84	10	30		1,301		-	-	-	-	-
Admin Assistant	2,080	600	224	112	10	30		1,104		-	-	-	-	-
Admin Assistant	2,080		224	112	10	10		1,724		-	-	-	-	-
Admin Assistant	2,080	100	216	112	10	20		1,622		-	-	-	-	-
Warehouse Controller	2,080	800	216	112	10	10		327	605	-	-	-	-	-
HVAC Whrse Controller	2,080	10	208	112	10	10		1,038	692	-	-	-	-	-
Auditor/Inspector	2,080	500	232	112	10	40		1,126	60	-	-	-	-	-
Auditor	2,080	30	232	112	10	30		1,606	60	-	-	-	-	-
Auditor	2,080		224	112	10	30		1,644	60	-	-	-	-	-
Auditor/Inspector	2,080	30	224	112	10	40		1,604	60	-	-	-	-	-
Auditor	2,080		224	112	10	30		1,644	60	-	-	-	-	-
Auditor	2,080		224	112	10	30		1,644	60	-	-	-	-	-
Crew Leader	2,080		224	112	10	20				1,714	343	257	171	943
Crew Leader	2,080		216	112	10	20				1,722	344	258	172	948
Crew Leader	2,080		232	112	10	20				1,706	341	256	171	938
										-	-	-	-	-
Crew Leader	2,080		216	112	10	20				1,722	344	258	172	948
Crew Leader	2,080		216	112	10	20				1,722	344	258	172	948

DLR \$ Contract Aud.-Insp. Program Support Instructions+ DLR Variance Scratch Paper

Budget Planning

Contract Planning Workbook

FIXED AMOUNTS

Total Allocation:	\$3,656,893	Liability Insurance:	\$20,000
T&TA Allocation:	\$40,000	Financial Audit:	\$13,250
Program Allocation:	\$3,616,893	BASELOAD:	\$15,000
Project 1:	\$0	Baseload Units 40	
Project 2:	\$0		
Total with Special Projects:	\$3,656,893		

Budget Lines

Admin.:	\$329,120	9.0%	Must be between 0 - 10%
Program Support:	\$1,010,024	45.0%	Must be between 15 - 45%
Health & Safety:	\$434,027	12.0%	Must be between 12 - 20%
Operations:	\$1,795,472		
SUM	\$3,568,643	Prog. Alloc. - Liab. Ins. - Fin. Audit - Baseload	

= Entry required
= Auto-calculated
= Hybrid

AVERAGES

In-House Measure Hours per UNIT:	35 m.h.	If zero, enter "0"
Direct Labor Rate:	\$86	\$86 per 'DLR \$' sheet
Direct Labor Expense per UNIT:	\$3,010	
Contractor Expense per UNIT:	\$600	
In-House Materials per UNIT:	\$2,370	
PER-UNIT SPENDING		
Operations:	\$4,816	
Health & Safety:	\$1,164	
Program Support:	\$2,715	
Admin.:	\$885	
AVERAGE COST PER UNIT:	\$9,580	
FULL Wx UNIT FORECAST:	372	

Month	Full Wx Units Completed per month	Admin	Liability Insurance	Financial Audit	^{1,2} Health and Safety	¹ Operations	Program Support	T & TA	Project 1	Project 2	Baseload	Monthly Total Expenditures	Accumulative Monthly Expenditures	Total Unit Count
July	36	27,427			42,003	173,755	97,744	2,765			1,250	344,944	344,944	36
August	36	27,427			42,003	173,755	97,744	2,765			1,250	344,944	689,888	72
September	34	27,427	5,000		39,669	164,102	92,314	2,765			1,250	332,527	1,022,415	106
October	33	27,427			38,502	159,276	89,599	2,765			1,250	318,819	1,341,234	139
November	25	27,427			29,168	120,663	67,878	2,765			1,250	249,151	1,590,385	164
December	25	27,427	5,000		29,168	120,663	67,878	2,765			1,250	254,151	1,844,536	189
January	25	27,427			29,168	120,663	67,878	5,425			1,250	251,811	2,096,347	214
February	26	27,427			30,335	125,490	70,593	2,765			1,250	257,860	2,354,207	240
March	30	27,427	5,000		35,002	144,796	81,454	2,765			1,250	297,694	2,651,901	270
April	30	27,427			35,002	144,796	81,454	6,500			1,250	296,429	2,948,330	300

Staff Entry DLR \$ Contract Aud.-Insp. Program Support Instructions+ DLR Variance Scratch Paper

WisWAP System

- Secured online system for distributing funds and invoicing job costs
- Advances provided in July and August
- Agencies submit invoices monthly by the 15th, receive reimbursement by the 1st
- WHEAP payments and referrals processed weekly on Wednesday evening

WisWAP Budget & Production

[Export Report](#) [Print](#) [Close](#)

Monthly Production vs Contract Plan

Cor

Selection Criteria: Report Type: By Grantee | Grantee: Ashland Co. Housing Authority - (02) | Contract Year: 2017

Grantee Name 02 Ashland Co. Housing Authority

Total Budget \$2,328,742.00

Total Units 203

Expenditures

Month	Planned Expenditures	Actual Expenditures	% of Planned Expenditures	YTD Total Actual Expenditures	YTD % of Cumulative Planned Expenditures	Planned Units Production
Jul	\$192,822.00	\$154,716.28	80.2%	\$154,716.28	80.2%	17
Aug	\$193,572.00	\$207,750.47	107.3%	\$362,466.75	93.8%	17
Sep	\$192,822.00	\$207,696.56	107.7%	\$570,163.31	98.4%	17
Oct	\$192,822.00	\$166,264.41	86.2%	\$736,427.72	95.4%	17
Nov	\$193,572.00	\$176,067.63	91.0%	\$912,495.35	94.5%	17
Dec	\$205,687.00	\$185,248.53	90.1%	\$1,097,743.88	93.7%	17
Jan	\$201,882.00	\$177,249.56	87.8%	\$1,274,993.44	92.8%	17
Feb	\$193,572.00	\$170,424.94	88.0%	\$1,445,418.38	92.3%	17
Mar	\$192,822.00					17
Apr	\$192,822.00					17
May	\$193,572.00					17
Jun	\$182,775.00					16

Actual Expenditures \$1,445,418.38

% of Annual Budget 62.1%

YTD Total Units 149

% of Annual Units Goal 73.4%

WHEAP Referrals

Browser: <https://wxtest.wi.gov/Referrals/ReferralSearchPost..> | WisWAP [WHEAP Referral S... x] | WisWAP Transmittals - Home

Convert Select

CCA WisWAP TEST HE+ Test HE+ WisWAP Rewrite HE+ sharepoint WECC SharePoint ESS - Time Recording Expense Reporting STAR Tra

WisWAP **WHEAP Referral Search Results** TEST Server

Main | Buildings | Invoices | Contracts | Admin | Search | Reports | Help | [Inbox: 156 messages \(13 new\)](#)

First Previous **Next** Last 4063 records found, showing records 1-50 (page 1 of 82).

Criteria: Grantee:"Ashland Co. Housing Authority - (02)" Prev Wx:"A" Application Date From:"3/23/2016" Other Criteria:"BuildingID Is Null "

[Search](#) [Reset](#) [Update Referral Details](#) [Mailing Labels](#) [Export](#)

WHEAP Referral Search Results										
<input type="checkbox"/>	Priority ID	App date	Name	Address	City	WEFI Therms	WEFI KWH	Housing Type/Units	Own/Rent	Status
<input type="checkbox"/>	2	10/14/2016			POPLAR			SFH (1)	O	Referral Add Building
<input type="checkbox"/>	4	10/11/2016			SOUTH RANGE			SFH (1)	O	Referral Add Building
<input type="checkbox"/>	8	12/15/2016			GLIDDEN			SFH (1)	O	Referral Add Building
<input type="checkbox"/>	10	2/3/2017			BAYFIELD	383	3157	SFH (1)	O	Referral Add Building
<input type="checkbox"/>	21	10/17/2016			IRON BELT			SFH (1)	O	Referral Add Building
<input type="checkbox"/>	37	11/14/2016			GLIDDEN	717	6559	SFH (1)	O	Referral Add Building
<input type="checkbox"/>	39	10/3/2016			ASHLAND			SFH (1)	O	Referral Add Building
<input type="checkbox"/>	40	12/15/2016			SUPERIOR			SFH (1)	O	Referral Add Building

[Building #149024](#) > Regular Job Details

Jobs associated with building #149024

Job ID	153703	Building Status	Closed
Original Job ID	n/a	Grantee Unit Job#	
Contract #	00WX1718.02 (2017)	Work Crew	
Job Type	Original	Work Start Date	
Area Type	Unit	Work Completion Date	
Job Creation Date	12/16/2016	Job Estimated Total	\$ 3,374.18
Job Completion Date	2/3/2017	Job Total	\$ 5,221.50
Audit Completion Date	John Michaelson 12/16/2016	Grantee Inspection	Mark Joseph Schmitt
Is ARRA Building?	No		
Address			
Job Comments	(none)		

☒ Edit Job

☒ Add Rework Job

☐ Add/Edit Measures

☐ Job Costing

☐ Printable Work Order

☐ Job Summary

☒ Delete This Job

Agency enters
job information
and checks
Ready for
Invoice.

Costs & Funds Summary					
Job Costs	Job Funds		Job Hours	Job Costs Estimate	Job Cost Actual
	DOE Fund \$ 0.00	ECM	0.00	1,619.18	2,240.00
Job Actual Costs \$ 5,221.50	PB Fund \$ 5,221.50	Health & Safety	0.00	1,700.00	2,891.50
Total Reductions \$ 0.00	EAP Fund \$ 0.00	Repair	0.00	55.00	90.00
Net Cost \$ 5,221.50	Invoice Amount \$ 5,221.50	Total Hours	0.00	3,374.18	5,221.50

Job Measures												
Measure / Description	Unit	Qty	Labor Hours	Unit Cost	Total Cost	Reduction	Reduction Type	Fund	Invoice Amount	Ready For Invoice	Month Invoiced	Not Installed
ABD045 - Air Sealing Air Sealing	CFM50 Reduction	Estimate: 0 Actual: 79	0.00 0.00	\$2.00 \$4.27	\$0.00 \$337.50	\$0.00	none	PB	\$337.50	✓	07	
DIA040 - Attic Insulation Blown Cellulose - Unfloored R38	sq ft	Estimate: 1056 Actual: 1056	0.00 0.00	\$1.03 \$1.10	\$1,087.68 \$1,166.00	\$0.00	none	PB	\$1,166.00	✓	07	
PCFL005 - Lighting CFL Bulb	each	Estimate: 5 Actual: 5	0.00 0.00	\$4.50 \$9.50	\$22.50 \$47.50	\$0.00	none	PB	\$47.50	✓	07	
PCFL070 - Lighting LED Bulb	each	Estimate: 5 Actual: 5	0.00 0.00	\$0.00 \$6.00	\$0.00 \$30.00	\$0.00	none	PB	\$30.00	✓	07	
URR005 - Refrigerator Replacement	each	Estimate: 1 Actual: 1	0.00 0.00	\$509.00 \$659.00	\$509.00 \$659.00	\$0.00	none	PB	\$659.00	✓	07	
XHA0006 - Health and Safety Air Quality Worst Case Depressurization w/o Draft	each	Estimate: 1 Actual: 1	0.00 0.00	\$50.00 \$20.00	\$50.00 \$20.00	\$0.00	none	PB	\$20.00	✓	07	
XHAR005 - Health and Safety Ventilation 62.2 Exhaust Ventilation	each	Estimate: 1 Actual: 1	0.00 0.00	\$500.00 \$1,127.60	\$500.00 \$1,127.60	\$0.00	none	PB	\$1,127.60	✓	07	
XHHW005 - Health and Safety Hot Water Water Heater Replace	each	Estimate: 1 Actual: 1	0.00 0.00	\$1,150.00 \$1,743.90	\$1,150.00 \$1,743.90	\$0.00	none	PB	\$1,743.90	✓	07	
ZRA0005 - Repair Air Quality Dryer Venting	each	Estimate: 1 Actual: 1	0.00 0.00	\$55.00 \$90.00	\$55.00 \$90.00	\$0.00	none	PB	\$90.00	✓	07	

Agency enters and submits monthly invoice.

All job costs marked ready for invoice populate in the Operations and H&S line items.



Browser address bar: <https://wxtest.wi.gov/Invoices/InvoiceEdit.asp?con>

Page Title: WisWAP [Create New Invoi...]

Navigation: Main | Buildings | Invoices | Contracts | Admin | Search | Reports | Help

Page Header: **WisWAP** Create New Invoice For February 2017 TEST Server

Inbox: 156 messages (13 new)

Grantee	Ashland Co. Housing Authority	Invoice No.	Pending
Contract No.	00WX1718.02	Invoice Status	New
Contract Month	8 of 24	Invoice Month	February 2017
Purchase Plus Doc ID		STAR Voucher Number	
WX Email Sent	No	STAR Upload Status	
15% Email Sent	No		
ARRA Email Sent	No		

Line Items	Funds		
	DOE	PB	EAP
Administration	0.00	0.00	0.00
Operations	0.00	69916.48	3780.55
Program Support	0.00	0.00	0.00
Liability Insurance	0.00	0.00	0.00
Financial Audit	0.00	0.00	0.00
Health & Safety	0.00	9543.53	865.50
TTA	0.00	0.00	---
Baseload Operations	---	0.00	0.00

Training and Technical Assistance

Program Evaluation

- Self Evaluation Study
 - Statewide and Agency Summaries
- Audit Quality Assurance
 - Identify training needs
 - Acknowledge auditors and agencies that are doing good work

Quality Assurance Monitoring

- Focused on Training and Technical Assistance
- Working together to achieve program mission and contract goals
 - Share Administrative Review tools with sub-grantees at beginning of program year
 - Optional inspection checklists
- Language in monitoring tools is important

Mutual Expectation Challenges

- SIR is not the only test in selecting units for production
 - High cost jobs and “proper” use of funds
 - Fairness is important to our stakeholders
- Balancing flexibility with clarity
- Delays in referral extraction at beginning of WHEAP program year
- Support Cost Threshold

Communication



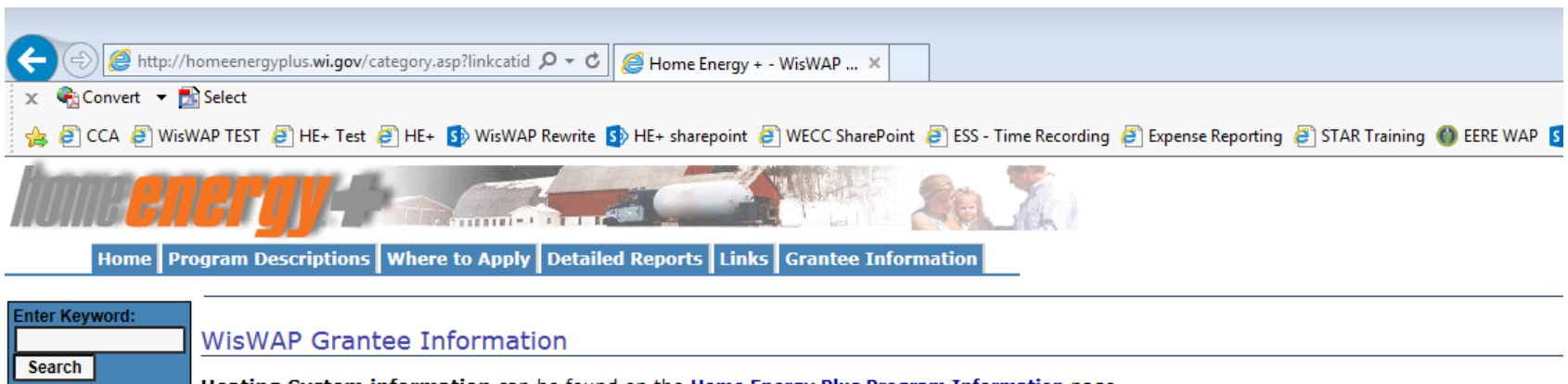
Guiding Documents

Document	Audience
WAP Contract	Agency Executives, WAP Manager
Program Manual	Program Mangers and Support Staff; Energy Auditors & Inspectors (Chapter 8)
Field Guide	Technical Staff
Weatherization Assistant Guide	Energy Auditors
Information Transmittals	Specified in transmittal

Program Information

Policy Manuals and required forms are easily accessible on public website

<http://homeenergyplus.wi.gov/category.asp?linkcatid=494&linkid=122&locid=25>



The screenshot shows the Home Energy Plus website. The browser address bar displays the URL: <http://homeenergyplus.wi.gov/category.asp?linkcatid=494&linkid=122&locid=25>. The website header includes a navigation menu with the following items: Home, Program Descriptions, Where to Apply, Detailed Reports, Links, and Grantee Information. Below the navigation menu is a search bar with the text "Enter Keyword:" and a "Search" button. The main content area is titled "WisWAP Grantee Information".

Heating System information can be found on the [Home Energy Plus Program Information](#) page.

Department of Energy Plans

[Program Year 2017 DRAFT DOE Annual Plan](#) (01/25/2017)

[Program Year 2017 DRAFT DOE Master Plan](#) (01/25/2017)

FY17 Program Manuals

[FY 2016-2017 Weatherization Program Manual](#) (12/28/2016)

[FY 2016-2017 Weatherization Program Manual Track Changes Update](#) (12/28/2016)

[Weatherization Manual Change Submittal Form](#) (12/7/2015)

Wisconsin Weatherization Field Guide

[Complete FY17 Field Guide](#) (06/27/2016)

[Chapter 1: Diagnosing Air Leakage](#) (06/22/2016)

[Chapter 2: Heating Envelope Building Measures](#) (06/22/2016)

[Chapter 3: Heating System Measures](#) (06/22/2016)

[Chapter 4: Base Load Measures](#) (06/22/2016)

HE+ SharePoint

Procurement, AR Uploads, Information Transmittals

homeenergy+

Special Project - HVAC Cost Sheets

Procurement Toolkit

Procurement Home

- HVAC Cost Sheets
- WisWAP Transmittals
- DEHCR Home
- Recent
- EDIT LINKS

Announcements

+ new announcement or edit this list

✓ Title	Modified	Modified By
Right to Cure Notification	... March 1	<input type="checkbox"/> Klusmeier, Amy - DOA
Welcome to the HE+ Procurement site!	... November 28, 2016	<input type="checkbox"/> Klusmeier, Amy - DOA
Instructions for Searching Document Library	... November 23, 2016	<input type="checkbox"/> Klusmeier, Amy - DOA

Policy Resources

+ new link or edit this list

✓ URL	Notes
HE+ WisWAP Grantee Information	... Policy Manuals, Field Guides, Forms
HE+ Program Information	... Furnace Program Documents
2 CFR 200 Procurement Standards	... Federal OMB Circular Guidance
State Procurement Manual	... State of Wisconsin Guidance
DOE Financial & Procurement Toolkit	... WAP Memorandum 015

Document Library

+ new document or drag files here

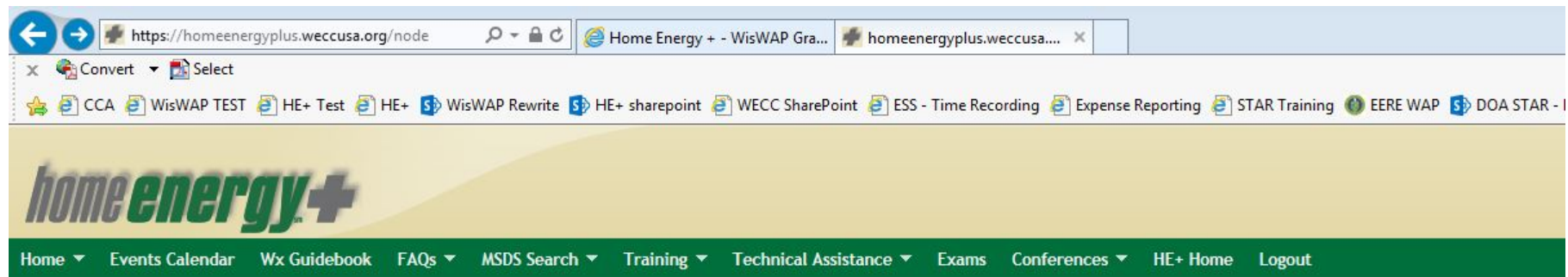
✓ Subject	Name	Last Updated
-----------	------	--------------

Ineligible Vendor Lists

+ new link or edit this list

✓ URL	Notes
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HE+ T&TA Website



Welcome to the Home Energy Plus Training and Technical Assistance Information Site

The Home Energy Plus Training and Technical Assistance Information Site provides materials and tools for program staff to increase their technical and/or implementation skills. Weatherization and Wisconsin Home Energy Assistance Program staff will find information related to training opportunities, training event schedules, session presentations as well as technical assistance tools on this site.

Enhance your skills by attending an upcoming training event!

To obtain more information or register for a training listed below, visit the Events Calendar. A printable version of the training schedule is posted under the Training menu above - select Training & Technical Aids, and Weatherization.

April 2017

*Weatherization Contract Planning Workbook Webinar
April 4, Webinar*

Targeted Dense-Pack and Advanced Insulation Techniques



HE+ T&TA Calendar

Browser: <https://homeenergyplus.weccusa.org/eventscalenc>

Home Energy + - WisWAP Gra... Events Calendar New | hom...

Convert Select

CCA WisWAP TEST HE+ Test HE+ WisWAP Rewrite HE+ sharepoint WECC SharePoint ESS - Time Recording Expense Reporting STAR Training EERE WAP D

homeenergy+

Home Events Calendar Wx Guidebook FAQs MSDS Search Training Technical Assistance Exams Conferences HE+ Home Logout

Year 2017 Month March

February

March 2017

Sun	Mon	Tue	Wed	Thu	Fri
26	27	28	1 Better Buildings: Better Business Conference	2 Better Buildings: Better Business Conference	3 Better Buildings: Better Business Conference
5	6	7	8	9	10
12	13 Technical Development Work Group Meeting	14 Office of Management and Budget Uniform Guidance Training	15 WOW & Hudson Group Meeting	16	17
19 HPC National Home Performance Conference and Trade Show	20 HPC National Home Performance Conference and Trade Show	21 HPC National Home Performance Conference and Trade Show	22 HPC National Home Performance Conference and Trade Show	23	24
26	27	28	29	30	31

HE+ Help Desk

Sub-grantee email and telephone help line

- Calls are routed to DEHCR staff based on content
 - Technical policy, eligibility, procurement, etc.
- Correspondence is stored in Access database
 - Helps DEHCR provide consistent responses and identify training needs
- Timely response is key

WOW, Inc.

(Weatherization Operators of Wisconsin)

Association of non-profit agencies

- Bylaws
- Annual elections for officers
- Funded by dues and program support
- One vote per agency
- Members must actively serve on at least one committee

Work Groups & Committees

- **WOW Committees**

- Executive; Procurement; Housing/Wx Cooperative; Management Training; Program Manual; Quality Assurance; Hudson Group

- **Technical Development Work Group**

- DEHCR/WECC led, T&TA Plan activity

- **Ad hoc Work Groups**

- Procurement; WisWAP Rewrite

WOW Meetings

- **Bi-monthly Meetings**

- *Tuesday*: Technical Development Work Group Meeting and Management Training
- *Wednesday Morning*:
 - Roundtable (WOW only)
 - Committee Meetings (combined)
 - WOW and Hudson Group Meetings (combined)

WOW Meeting Standing Agenda

8:00	Round table discussion
8:45	Committee meetings
9:30	Call meeting to order » Agenda, Minutes, Treasurers Report
9:40	Committee reports
10:20	DEHCR report
11:15	Old business
11:30	New business
12:00	Adjourn

Communication Challenges

- Active participation in WOW meetings and committees
- Consistency in communication from DEHCR
- HE+ Help Desk – negative connotations
- Full disclosure of sensitive information

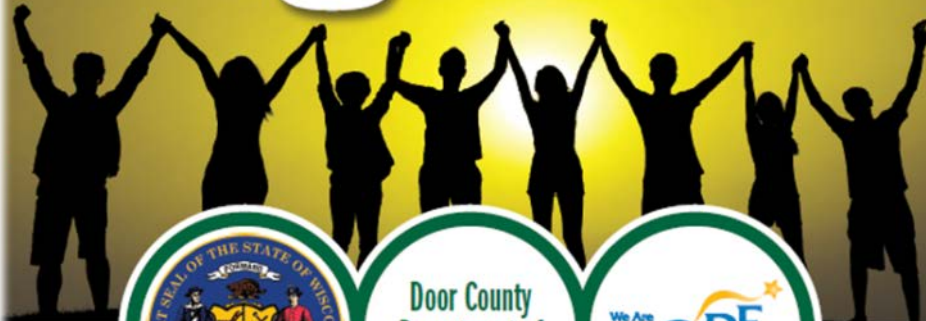
Cooperation/Coordination



Regional Coordination

homeenergy+

**We're in this
together**



Door County
Department of
Social Services



For more than 35 years, the Wisconsin Weatherization Assistance Program has helped Door County residents like you save on their home energy bills through no-cost weatherization and energy-efficiency home upgrades.

homeenergy+

**We're here
for you**



Home Energy Plus assists more than 230,000 income-eligible Wisconsin residents each year.

Our services include:

- Energy bill payment assistance
- Furnace services
- Crisis assistance
- Weatherization

Check out Home Energy Plus today!

www.homeenergyplus.wi.gov 1-866-HEATWIS (432-8947)

DO YOU WANT TO LOWER YOUR ENERGY COSTS? LET US HELP!



Because you are income-eligible for the Wisconsin Home Energy Assistance Program (WHEAP) you are also eligible for Couleecap's Weatherization Assistance Program.



Weatherization Application

WHEAP Application # _____

Applicant name(s) _____

Home Phone _____ Cell Phone _____

☐ Natural Gas ☐ LP ☐ Fuel Oil ☐ Electric ☐ Other



Housing and Energy Collaboration

New initiative to improve the coordination of CDBG and HHR programs to address weatherization deferrals

- Work Group → WOW Committee
- Coordination meetings
- Combined trainings and conferences
- Streamlining Historic Review process
- Conflict of interest policy

T&TA Planning

- Annual survey of sub-grantees to determine training needs in 3 areas
 - Technical
 - Management & Supervisory
 - Potential New Training Topics
- Training Code of Excellence
- On-going evaluation and feedback loop throughout year
 - Contract evaluation and training evaluations

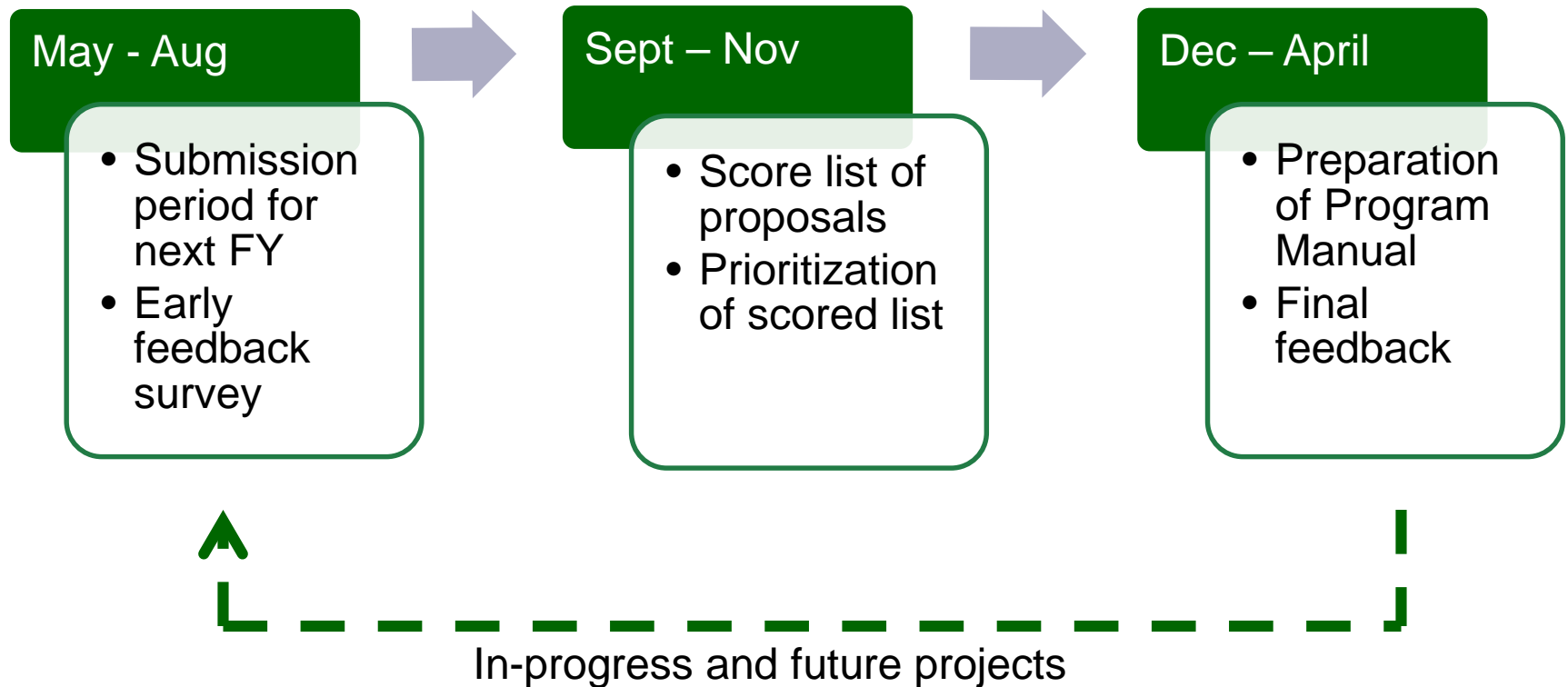
Conferences and Fairs

Annual Home Energy Plus Conference

Bi-annual Technical Exchange Fair



Continuous Improvement Annual Timeline



State Plan Process

- January: WOW Meeting
- February: HE+ Conference
- March: WOW Meeting
- April: Contract Planning Workbook webinar; LIEAC Meeting; Public Hearing
- May: WOW Annual Meeting (required)

Cooperation Challenges

- Geographic territories for WHEAP and Weatherization
- Housing funds are limited and prioritized by regional sub-grantees
- Leadership: State and Sub-grantee levels
 - Burnout factor

Trust

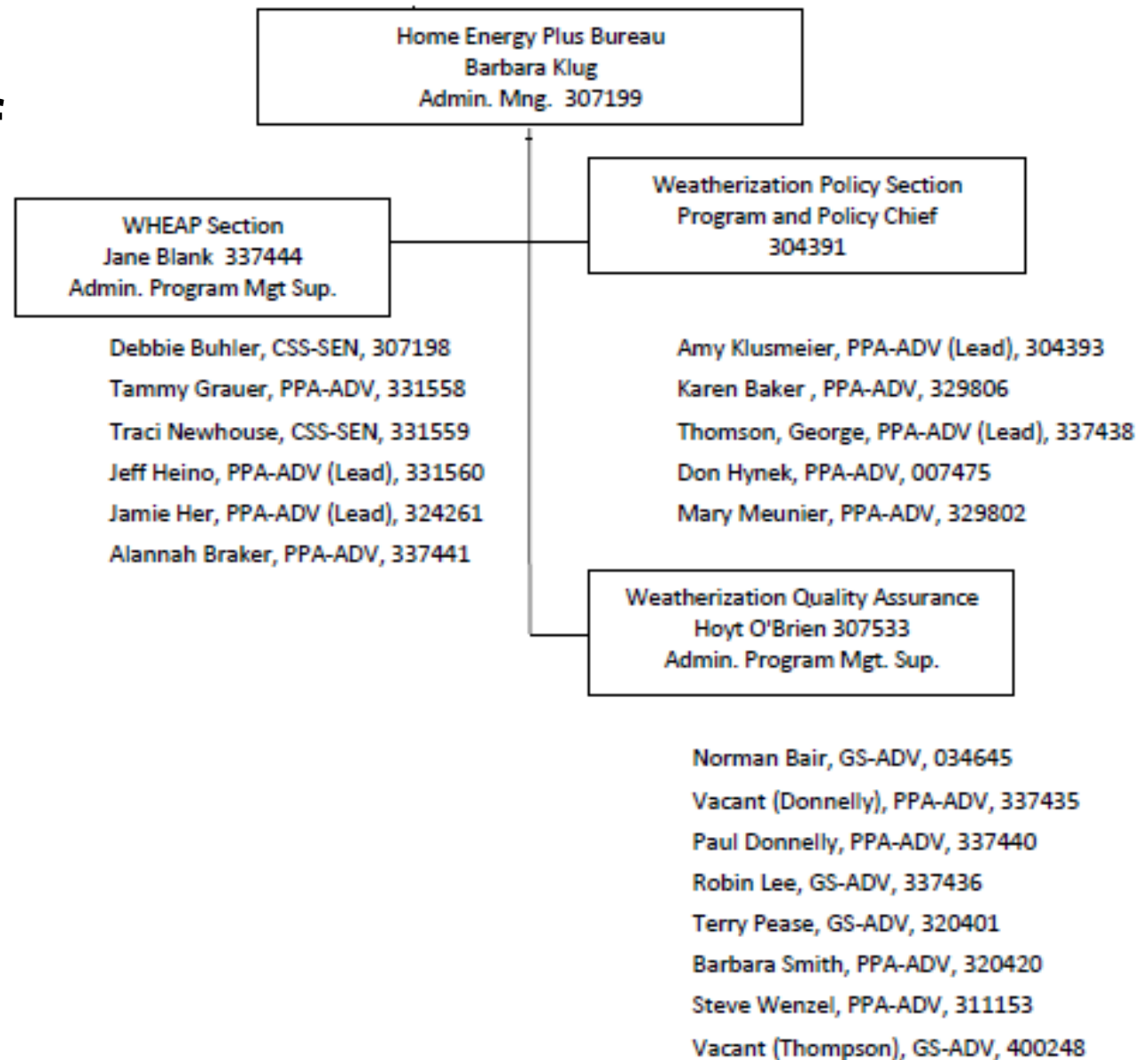


Retention – Sub-grantee Staff

	Workers Certified	Workers Still in WisWAP	Retention %
Energy Auditors	190	123	64.7
QCI – Agency	49	48	98.0
QCI – State	16	15	93.8

- 190 auditors certified since 2007 and 65 QCI certified since 2015
- More turnover in field crew positions
- Very little turnover in Program Manager positions

Retention – Grantee Staff



Trust Challenges

- All previously mentioned challenges!
- Staff turnover
- Consistency in communication & policy interpretation (Help Desk and Monitoring)
- Consistency in payments & maintaining a user-friendly reporting system

Closing Thoughts

Important factors in effective relationship:

- Celebrating successes
- T&TA Plan developed with input from sub-grantees
- Regular candid communication
- Consistent payment & referral schedules
 - Good electronic reporting system
- Collaboration on program and policy changes
 - Active sub-grantees willing to take leadership roles