

Developing a Peer Exchange

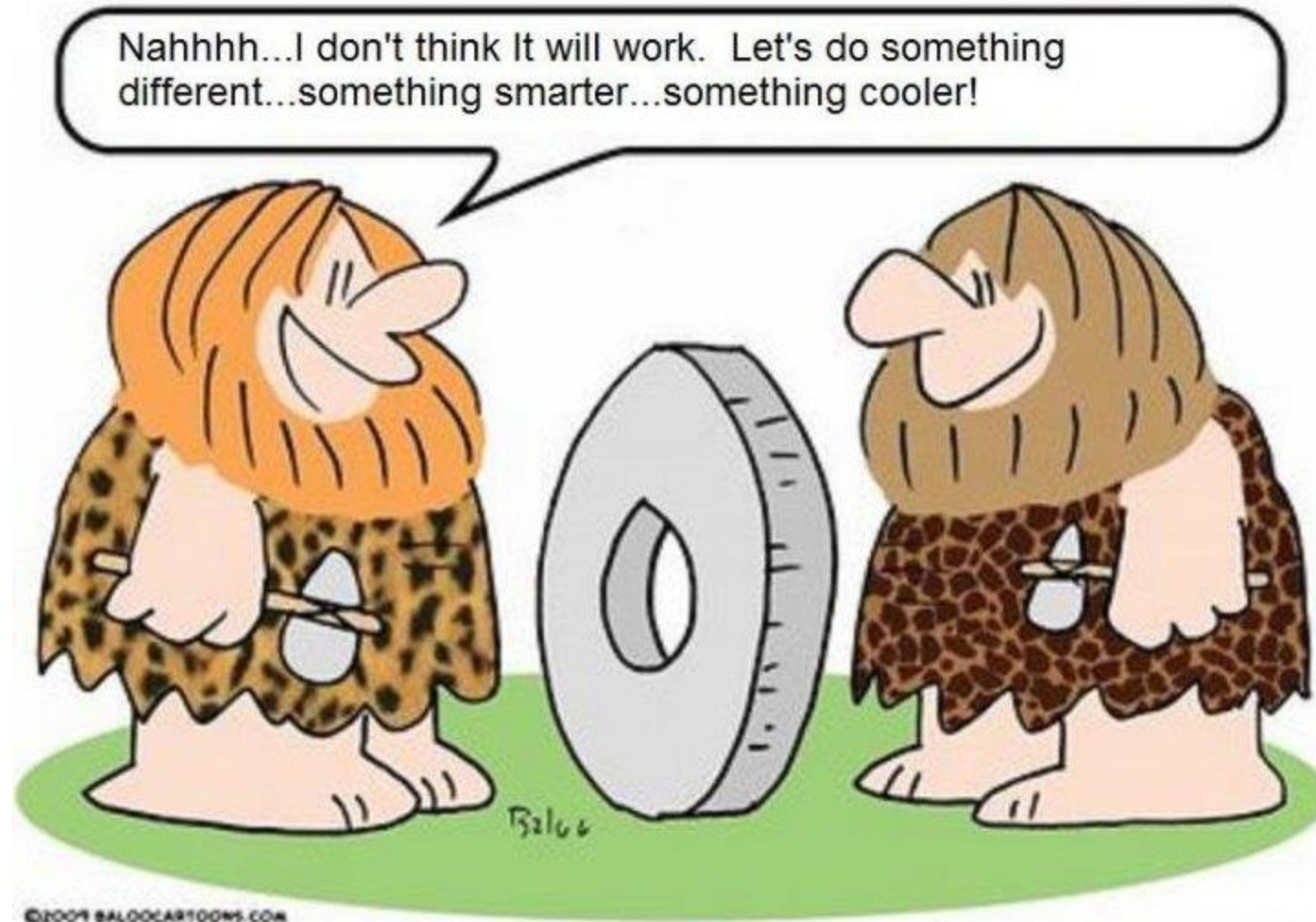
Brad Carpenter, Utah

Blake Worthington, Tennessee

NASCSP Annual Conference - September 2019



Peer Exchange ver 2.0



PY 17 Utah WAP Peer Exchange

- Round robin style between 7 sub-grantees
- Individuals were selected by State WAP Staff
- Spread out over 8 weeks in spring of 2018
- Checklist was completed by the “traveler”

Feedback



15 February 2019



Selecting the right Grantee

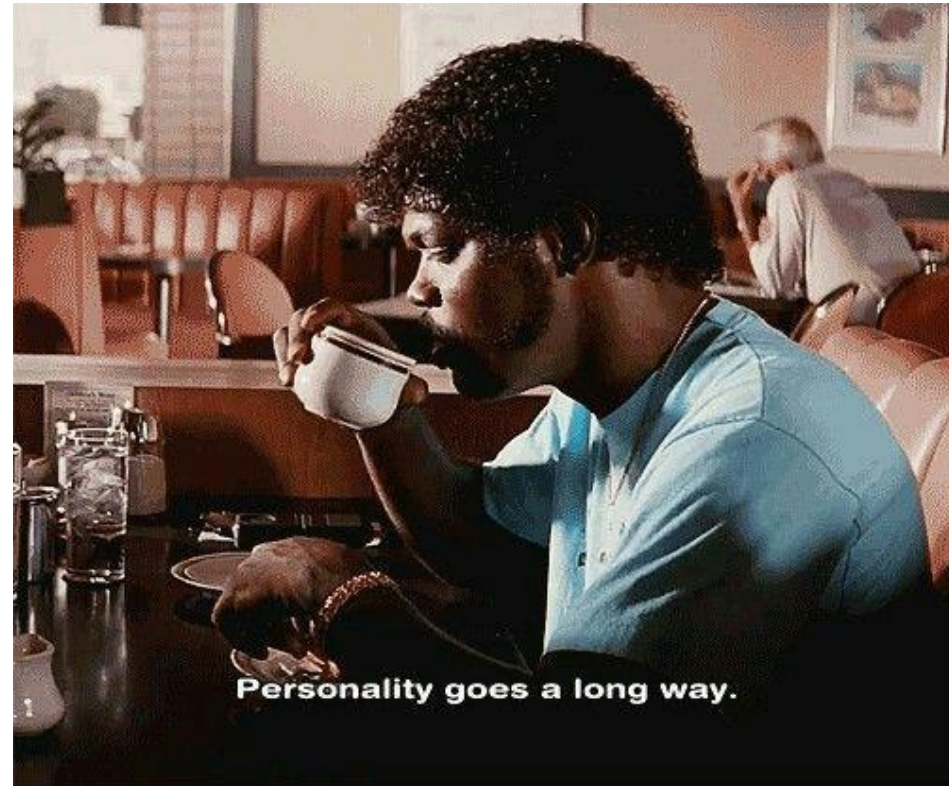
- Funding composition
- Relative program size
- Attitude of Grantee staff
- Enough difference to leave room to learn

Selecting the right Staff



Selecting the right Staff

- Level of Experience
- Role in the program
- Personality





Making Your Business Case

Utah/Tennessee Peer Exchange

UTAH WAP SEES AN OPPORTUNITY TO FIND WAS TO INNOVATE FROM INTERACTING WITH OTHER GRANTEEES AT A SIMILAR COST AS A NATIONAL EVENT.

Project Scope:

Utah Weatherization Assistance Program (WAP) would send 1 state staff member and 1 sub-grantee member to Tennessee for 1 week. The exchange would be facilitated through a jointly developed checklist that acts as the outline for the experience. The traveling staff would then do an exit briefing with Tennessee WAP Staff and a presentation to Utah WAP leadership at our next meeting.

Additionally Department of Energy (DOE) Weatherization Manager, Erica Burin, and National Association For State Community Services Programs (NASCSPP) would like the states to co-present at their Annual Conference in Little Rock September 2019 on this event.

Expenses:

Anticipated costs are detailed below. Expenses would be covered using Training & Technical Assistance (T&TA) funds. These costs were already budgeted for attending a national training in the current budget. The participant from the Utah local agency would be responsible for their expenses using exiting T&TA funds already under contract to them.

	Total
Hotel	\$ 680
Flight	\$ 660
Per Diem	\$ 273
	\$ 1,613

Agenda:

Day 1:

Travel
Entrance Briefing

Day 2:

State Operations Checklist

Day 3:

Sub-Grantee Operations Checklist
Sub-Grantee Monitoring & Training Checklist

Day 4:

Energy Auditing Checklist
Quality Control Inspection Checklist

Day 5:

Exit Briefing
Return Travel

Background:

In 2018 Utah WAP experimented with a Peer Exchange Program between their sub-grantees. The goal was to facilitate the lessons learned at multiple levels of the program between agencies. Utah staff developed job specific checklists for the “traveler” to complete during their exchange. This served as a control to prevent the exchange from becoming a paid vacation and acted as an outline for traveler to do an exit briefing explaining the differences discovered and lessons learned from the experience. This briefing was repeated at their home base.

Results from the exchanges produced exceptional feedback. There was sharing between agencies of:

- Agency developed forms
- Form letters
- Calculators or other Excel tools
- Demonstrations of inventory software led to 2 agency upgrading their products
- Use of iPads or tablets have improved with agencies looking at going paperless
- Junior or new staff were paired with veterans of the program for mentoring

These results are still bringing positive impact statewide. One of the biggest improvements was opening lines of communication from agency to agency. They are more willing to contact one of their peers when trying to solve a problem.

Identified Opportunity:

In DOE grant application guidance for the last several years has required states to answer specific question regarding steps they are taking to evaluate themselves and efforts they are undertaking to be on a “path of continuous improvement”. Participation in national conferences does provide a moderate level of perspective to what national network is doing but the results from Utah’s own Peer Exchange showed that the hands on personal interaction at lower levels produces far more effective results.

If it didn't get written down it never happened



Checklists



Checklists

Wx Grantee Peer Exchange Checklist

Name of Traveling Agency Staff: _____ **Date:** _____

Name of Host Grantee Contact: _____

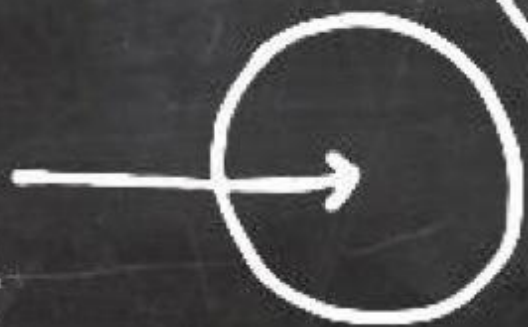
Grantee Operations:

1. What is the grantee staff composition?
2. How are roles and responsibilities divided among the staff?
3. What other roles besides weatherization are they tasked with?
4. What are the program's funding sources? Do they braid funding or keep their funds siloed?
5. Number of sub-grantee's? Crew or contractor based? CAA's, private non-profit, or government agency?
6. Does staff feel they have the capacity to implement new initiatives or are they just keeping their head above water?
7. What process does the grantee use to develop program goals?

Checklists

- Grantee Operations
- State Plan Development
- Grantee Training Plan
- Monitoring Process
- Energy Auditing
- Production/Final Inspections
- Client Intake
- Client Files
- Purchasing & Inventory
- Local Agency Program Ops
- Admin Functions

Your
Comfort
Zone



Where the
magic happens