



2019 American Customer Satisfaction Index Survey Working Group Summary Report

Most Improved States | [View Webinar Recording](#)

States Participating: Arizona, California, Maine, Pennsylvania, Tennessee, Wisconsin

Solution: Create a WAP stakeholder committee

- Goal: Solicit and incorporate feedback and expertise from the network to improve statewide WAP operations.

State offices are responsible for setting rules and policies for their state WAP network, often through documents such as the policy manual, field guide, health and safety plan, etc. These documents are often time intensive to create and require local expertise. Stakeholder committees can provide ongoing and project-based feedback in to provide context the does not appear in ACSI data or other formal surveys.

Ongoing/Routine

- Expansion/Enhancement of the Policy Advisory Council (PAC) and/or increased utilization of existing PAC
- Creating more opportunities to provide input on annual state plan with a clearly defined schedule that is communicated widely to the network each year

Project Based

- Technical committee to review field guide, policy committee to overhaul policies & procedures manual
- Funding formula workgroup to examine how the state distributes funds
- Formal State Weatherization Improvement Group or more general listening sessions

Examples from States:

-Pennsylvania created three committees within their PAC (Training, Coordination, Technical) and increased agency representation on each committee.

-Wisconsin provided more opportunities to comment on the annual State Plan, including webinars held by the state office to review the state plan and relocating the public hearing to a more accessible/central location.

- California created a Weatherization Improvement Project (WIP) committee of 30 service provider representatives consisting of executive directors, program managers, and field staff. The committee worked to simplify, consolidate and add clarity to field manuals, policies, and training procedures.

-Tennessee created a Technical Advisory Group made up of network members that meets monthly



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Solution: Implement Formal Process Improvement

- Goal: Improve WAP processes and procedures through by utilizing a formal process improvement system or consultant.

States reported utilizing a formal performance management system, Results Oriented Management and Accountability (ROMA) to analyze and improve their WAP. ROMA has long been used in the Community Action network to improve outcomes of programs and services, enhance data, and streamline processes and procedures. Implementation required key staff at the state and local agencies to be trained in the system. Another approach utilized was to hire an outside business consultant to work with each agency and provide on demand technical assistance focused on business processes.

Examples from States:

-Pennsylvania's state office and local Community Action Agencies have certified ROMA Implementers and ROMA Trainers on staff.

-Pennsylvania hired a business consultant to help agencies interested in addressing production, spending, and management issues

More Information

Results Oriented Management and Accountability (ROMA): [Association of Nationally Certified ROMA Trainers](#)

Solution: Increase Transparency Around Risk and Production

- Goal: Improve WAP network performance surrounding spending and production goals.

Several states with improved ACSI scores created robust risk assessment tools or enhanced their existing risk assessment tools. Additionally, the criteria determining risk as well as each agency's score is clearly and regularly communicated to all subgrantees. The state office also diligently tracks and analyzes spending and production goals to ensure funds can be moved and targeted more effectively if needed.

Examples from States:

-Pennsylvania sent weekly production spreadsheets to all local agencies so each agency could see how they and their peers were progressing towards goals. This fostered a healthy sense of competition and unity. Pennsylvania also instituted a new risk assessment and had regularly conference calls with agencies about their risk status.



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-Maine updated its risk assessment while simultaneously increasing state staff providing technical assistance during monitoring in the field rather than from the office.

Solution: Formalize and Schedule Communications

- Goal: Improve clarity and consistency of information provided to the network.

All states in the Most Improved group mentioned improvement of Communications as a major focus. Communications is also a major impact driver within the ACSI survey and strongly impacts a state's score.

Examples from States:

- Arizona developed a Technical Bulletin system to explain new technical rules and procedures to local agencies and to communicate anything new coming from DOE
- California developed its own Program Notices to send to local agencies mirroring DOE's WPNs
- Maine implemented quarterly check in meetings with all of their agencies
- Pennsylvania utilized a Sharepoint site so that agencies could easily access documents and resource

More information:

See example Technical Bulletins from Arizona

Solution: Harmonize Rules to Blend/Braid Funds

- Goal: Empower agencies to more comprehensively weatherize homes and/or weatherize more homes.

By aligning rules at the state level, states can maximize each funding source available. States in the Most Improved group reported examining the LIHEAP plans of their peer states and adjusting the rules applied to their LIHEAP weatherization funding in their LIHEAP plan. States also reported increasing communication with State LIHEAP office.

Examples from States:

- Pennsylvania adjusted their LIHEAP rules after listening sessions with agencies and also secured additional LIHEAP funding specifically to address/reduce deferrals.
- Tennessee adjusted its LIHEAP rules in the State LIHEAP plan and increased coordination with its State LIHEAP office.



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Solution: Simplify Contracts and Invoicing Process

- Goal: Reduce the burden on both state staff and local agencies surrounding annual contracts and regular invoices.

States in the Most Improved group identified contracting and invoicing as major stress points in the relationship between the state and the local agencies. In their efforts to simplify these processes, states reported using less paper and moving to entirely electronic processes. States reported clarifying contract language and reducing the steps involved in submitting and reviewing invoices.

Examples from States:

- Maine systematically reviewed its invoicing process and minimized the number of hands that the invoice passed through at the state
- Tennessee streamlined the invoicing process by utilizing new state software to facilitate uploads and quicker reviews
- Pennsylvania reported moving to multiyear contracts/a “master agreement” to reduce the steps needed
- California reported updating their contracts with agencies so that they were simpler and easier to understand

More information:

See example Master Agreement from Pennsylvania

Solution: Make Training More Accessible and Relevant

- Goal: Provide agencies with training specific to their needs and ensure training can be delivered via numerous methods.

Based on comments from the first round of the ACSI, two states specifically addressed the training that their agencies received. Agencies wanted more on-demand training and training better tailored to their needs.

Examples from States:

- Pennsylvania increased the budget for its training center to provide more on-demand training tailored to the needs of each agency. The training center also developed video, online, and remote training options.



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- Pennsylvania brought in trainers from other sectors such as business operations and project management
- Tennessee utilized a training contractor to provide more opportunities for as-needed training, in the field, one-on-one with agencies.

Communications | [View Webinar Recording](#)

States Participating: Delaware, Missouri, New Hampshire

Solution: Increase Communications During Times of Change

- Goal: Adapt routine communication procedures to accommodate major changes, ensuring clear and effective communication to the WAP network.

The state WAP offices with high scores in communications all reported having very regular and frequent communication channels with their local agencies. Additionally, these states reported increasing that communication in a planned and intentional manner whenever a large change or transition was facing the network.

Examples from States:

- Delaware initiated a planned communications campaign to provide information throughout the process of adding a new subgrantee to the network
- Missouri increased communications during the development of the state plan so that local agencies were more aware of the timeline and how to provide input
- New Hampshire has a standing phone call with each local agency every month and has three single-day face to face meetings with the whole network each year

Solution: Improve Invoicing Process

- Goal: Examine and streamline invoicing process in order to improve communication between State and local agencies.

States in the Communications group identified the routine invoicing process as a major point of communication between the State and the local agencies. Confusion and miscommunication about the



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invoicing process lead to a lot of friction between the state and local agencies. Incorrect or incomplete invoices created a lot of “negative communication” which harmed the relationship.

Examples from States:

-Delaware used the Lean Process Improvement to examine their invoicing process. They streamlined the process and digitized most of the steps, incorporating them into their statewide database. Through communication Delaware also increased the understanding of the necessary information to be supplied by the subgrantee. Delaware tracked the number of invoices that had to be returned for correction: prior to improvements Delaware rejected 1/3 of its invoices, after improvements less than 10%.

Solution: Train State Staff In Technical Certifications

- Goal: State staff have the technical knowledge to be able to clearly communicate technical concepts and answer questions from the network.

States in this group identified technical questions and policies as a major source of communication between the state and local agencies. ACSI comments from the first round of the survey indicated that there was sometimes confusion about technical rules and procedures. By ensuring every state staff person has a basic understanding of the technical elements of the WAP program, guidance provided to local agencies is more consistent.

Examples from States:

-Missouri’s 8-member state WAP team have 4 certified Quality Control Inspectors (QCIs). Missouri also had 2 additional staff receive their Building Analyst certifications and regularly offers technical training to those who want it.

-Delaware’s WAP Program manager received a Building Analyst certification

-New Hampshire has a state staff person that chairs a statewide technical committee to work through technical issues in the network



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Solution: Utilize Strategic Contractors at the State

- Goal: Build communications capacity at the state office by using contractors to augment a lean state WAP staff.

States noted the challenges of managing the WAP program with a team of only one or two state employees. Many states have difficulty growing their team at the state WAP office, and as a result, communications with local agencies suffer due to lack of capacity.

Examples from States:

-New Hampshire only has one full time state staff member managing WAP. Over time, NH has begun to utilize contracted State Monitors and a contracted Technical Assistance Provider to provide more individual attention and communications to local agencies.

Partnerships | [View Webinar Recording](#)

States Participating: Michigan, Virginia, Vermont

Solution: Create a WAP Stakeholder Committee

- Goal: Strengthen the relationship between the state office and the subgrantee network of WAP providers.

As was noted in the “Most Improved” working group, there are many potential benefits to creating and maintaining a statewide committee to gather feedback. States that scored high in the Partnerships dimension also noted that the use of a committee or other stakeholder groups strengthens partnerships between the state and local level. By actively seeking to partner with local agencies on initiatives such as overhauling a policy manual or improving a field guide, the State increase engagement and buy-in.

Examples from States:

-Michigan created a “Change Vision” plan to improve the overall WAP program in the state and conducted regional meetings with local agencies to gather feedback and construct the plan.

-Vermont utilizes a process that circulates nearly all policies and changes to the local network seeking comment before making policy changes or starting new initiatives

Solution: Engage & Educate "WAP Adjacent" Stakeholders

- Goal: The State office takes the lead in building relationships with new entities, securing new opportunities for the WAP network, and increasing visibility of the program.



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The states who scored high in this category were actively promoting partnerships from the State office level. The states in this group felt that the bump in their score in part resulted because local agencies saw the state taking an active role on their behalf. The state WAP office has the scale and influence to be a major spokesperson for the WAP and a major advocate for the program. The state office has the ability to educate others about WAP and solidify new partnerships in a way that a single local agency could not. These states also secured new funding sources that benefit the entire network.

Examples from States:

- Michigan state WAP office staff began participating in the statewide Energy Waste Reduction Low Income workgroup, a part of their public service commission
- Virginia's state WAP office holds a seat on the Governor's Climate Task Force
- Virginia applied for and was successfully awarded HUD Healthy Homes grant funding that can eventually be used to layer healthy homes measures on top of weatherization
- Virginia invited diverse, non-traditional speakers to their state conference, creating an opportunity for partnership and professional development for their local agencies.
- Vermont worked with the Zonolite Insulation Trust to establish a funding relationship that helped local agencies remediate vermiculite in homes.

Solution:

Increased State Engagement with Utilities

- Goal: The State takes an active role in securing utility funding and shaping utility program design.

Utility partnerships have the potential to allow the WAP to weatherize more homes, provide more comprehensive services, and stretch federal dollars further. DOE regulations allow funding to be set aside in the state plan to fund a state staff person's efforts to build relationships with utilities in order to leverage additional funding. Additionally, states in this working group noted that the WAP state office was better suited to negotiating with utilities, whereas a single local agency may not be able to shape the terms and structure of a utility partnership.

Examples from States:

- Michigan's state office staff presented about the WAP to members of Public Service Commission working groups to encourage supplemental funding versus parallel programs
- Michigan worked with a few of their local agencies and a utility in order to establish a pilot program
- Virginia's state office gets involved with utility program design, promoting harmonization of utility weatherization program rules with WAP



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Solution: Closer Coordination With Other State Offices

- Goal: The State forges stronger interdepartmental Partnerships within the State to improve overall program operations.

States that scored high in partnerships reported having a strong connection with and regular communication with their State LIHEAP office and LIHEAP staff, regardless of where LIHEAP is managed within the state. States also built relationships with other offices that fund their local agencies or that could provide new opportunities for the WAP network.

Examples from States:

-Michigan built a new relationship with their State Energy Office and can now provide input when the state is crafting its state energy plans/portfolios

-Virginia enhanced its Policy Advisory Council (PAC) by inviting the State Department of Social Services (administers LIHEAP) and the State Office on Aging to participate.

-Vermont maintains strong partnerships with its state Health Department, Medicaid Office, Lead/Radon office, and others through a OneTouch common assessment/referral system

More information:

See OneTouch documents from Vermont

Technical Assistance | [View Webinar Recording](#)

States Participating: Alaska, Alabama, Idaho, Washington

Solution: Implement Informal/On-Demand T&TA

- Goal: Improve training and technical assistance (T&TA) by supplementing official monitoring visits and formal trainings with flexible T&TA interactions.

States in the Technical Assistance group identified flexibility of training and technical assistance as a key strategy to improve their ACSI score. As opposed to one size fits all training, States that increased their scores, customized their trainings and created opportunities for less formal interactions with their subgrantees.

Examples from States:



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-Alabama identified that the only time the State had been on-site at local agencies was for formal monitoring visits. After the 2017 ACSI, Alabama instituted unofficial TTA visits that are much more laid back and free flowing. Time is carved out to discuss the program with the subgrantee Wx Coordinator one on one in a less stressful environment.

- Washington funds their training center to provide on-demand trainings throughout the year tailored to specific agencies' needs.

-Idaho contracts with its State Community Action Association, which employs a Weatherization Training Coordinator, that works with agencies throughout the year to identify and plan training needs.

Solution: Incorporate Peer Exchange as a Training Method

- Goal: Improve the skills and capacity of new WAP staff by shadowing experienced WAP staff and involving experienced staff in development of trainings.

States with high scores in TTA relied on the institutional knowledge of experienced staff in the network to ensure high quality training. They also identified Peer Exchange opportunities as a training method that was very effective with new staff members. Rather than bringing in a trainer from a training center, these states utilized leaders in their network to deliver training.

Examples from States:

-Alaska uses TTA funds to train new WAP staff via shadowing/peer exchange. When a local agency hires a new team member, they can send them to another local agency of experienced crew members to shadow and learn for up to a week. When the state office hires new staff members, they also have the opportunity to shadow the work of a local agency.

-Washington' State WAP Office holds a "New Program Manager Training", in which most sessions are led by the experienced Program Managers from subgrantees throughout the network.

Solution: Collaborative Creation of Training Resources

- Goal: Engage local agencies in the development of field guides, training plans, and other training materials.

The states in this group worked with members of their local agencies to create, update, and maintain training and other WAP-related materials. This included field guides, policy manuals, conference agendas, training plans, and more.

Examples from States:



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-Alaska's state WAP office works with key staff from several local agencies to maintain its field guide and created a field guide format that would be most useable by staff in the field.

-Washington uses a statewide technical committee to continually update its field guide and better harmonize training materials to the SWS.

-Washington developed a funding matrix that can be used by local agencies to effectively and consistently maximize every funding source available in each home.

-Idaho's State Community Action Association works collaboratively with local agencies to engage in succession planning and training plan development.

More Information:

See Funding Matrix from Washington

Solution:

Support Local Agency-Led TTA Efforts

- **Goal:** Empower local agencies to take a degree of ownership over their own training opportunities and professional development.

In addition to state led training and technical assistance, states in this group reported giving local agencies the opportunity to select and customize their own training. This included encouraging local staff to attend national conferences.

Examples from States:

-Idaho designates most of its TTA funds to the local agencies, giving them autonomy over training and requiring each agency to craft its own TTA plan that meets IREC and state requirements.

-Alaska and Washington encourage participation by its local agencies in conferences such as EnergyOutWest and other peer lead training opportunities.

More Information:

See training Plan from Idaho