



## NASCSP 2022 Annual Training Conference

### WAP State Monitor's Training Agenda (subject to change)

#### MONDAY – OCTOBER 24, 2022

9:00 am – 9:30 am	<b>Continental Breakfast</b>
9:30 am – 10:00 am	<b>CSBG/WAP Joint Welcome</b>
10:00 am – 11:30 am	<b>U.S. Department of Energy (DOE) Office of the Inspector General Presentation on Waste, Fraud, and Abuse</b> Waste, fraud, and abuse are surefire ways to torpedo a program and can have a lasting effect. Join the Office of Inspector General representing DOE to look for red flags and address issues before they make it to the newspaper. We will explore lessons learned from compliance issues during the ARRA funding.  Presenter(s): <b>Adam Lorenzen</b> , <i>Special Agent, U.S. Department of Energy Office of Inspector General</i>
11:30 am – 1:15 pm	<b>Lunch (on your own)</b>
1:15 pm – 2:30 pm	<b>Monitoring Overview: What Is (Isn't) in an Agency Audit</b> The Agency Single Audit ensures that Subgrantees have a third-party review program expenditures and fiscal processes. How can a monitor use this to inform their monitoring approach? Learn the ins and outs of the Agency Single Audit and what it can and cannot offer your monitoring team.  Presenter(s): <b>Kevin Myren</b> , <i>CPA</i>
2:30 pm – 2:45 pm	<b>Break</b>
2:45 pm – 4:00 pm	<b>Risk, Risk Analysis, and Internal Controls</b> If on-site fiscal monitoring only happens once a year, how can we assess agency health for the other 51 weeks of the year? This session will explore agency internal controls and assessment procedures to define risk levels.  Presenter(s): <b>Kevin Myren</b> , <i>CPA</i>

4:00 pm – 5:00 pm

### **Key Concepts of Uniform Guidance**

The Uniform Guidance is the guiding federal rulebook for fiscal compliance but can seem intimidating to those of us who are not accountants or attorneys. Our CPA will break this down to make it understandable for everyone.

Presenter(s): **Kevin Myren**, CPA

## **TUESDAY – OCTOBER 25, 2022**

8:00 am – 8:30 am

### **Continental Breakfast**

8:30 am – 9:45 am

### **Monitoring – Purpose and Procedures**

Monitoring is crucial to determine program compliance, performance, impact, and areas for program improvement. Learn about the statutory, regulatory, and programmatic underpinnings of the monitoring process and ensure your state is getting the most out of the monitoring process.

Presenter(s): **Jonathan Ballew**, WAP Senior Program Manager, NASCSP; **Derek Schroeder**, Lead Policy Advisor for Technical Operations, Weatherization and Intergovernmental Programs Office, U.S. Department of Energy

9:45 am – 10:45 am

### **Getting All You Can from the Desk Review**

The desk review is a powerful tool to ensure compliance, but with technical, programmatic, and fiscal elements it can be difficult for a monitor to put together all the pieces. This session will assist Monitors in finding red flags in the submitted documents and making determinations on the quality of work, training opportunities, and the technician's general level of understanding. We will explore an appropriate timeline for desk reviews and methods to get the most out of the desk review.

Presenter(s): **Troy Cucchiara**, Green Initiatives Manager, New Mexico Mortgage Finance Authority; **Andrew Woodruff**, Assistant Training Center Director, Community Housing Partners

10:45 am – 11:00 am

### **Break**

11:00 am – 12:15 pm

### **Best Practices in Monitoring and Most Common Findings**

This session will highlight best practices and most common findings in the WAP network. We will also explore ways to ensure continuity between monitors and processes to take your monitoring to the next level.

Presenter(s): **Derek Schroeder**, Lead Policy Advisor for Technical Operations, Weatherization and Intergovernmental Programs Office, U.S. Department of Energy

**12:15 pm – 1:15 pm**

**Lunch**

**1:30 pm – 2:45 pm**

**Monitoring Multifamily Buildings**

Multifamily buildings are a crucial component of affordable housing, but how do we monitor them? This session will explore the idiosyncrasies of monitoring multi-family buildings, necessary timelines, process, and the required participants.

Presenter(s): **Stephanie Insinna-Sahondo**, *WAP Director, Colorado Energy Office*; **Ben Tucker**, *Training and Technical Assistance Specialist, Minnesota Department of Commerce*

**2:45 pm – 3:45 pm**

**Monitoring Updates for the BIL, WRF, and Competitive Grants**

What can Grantees expect with BIL monitoring and what changes are coming? Join us as DOE staff discuss what will be required to monitor BIL funds, competitive grants, Weatherization Readiness Funds, and the implications for SHPO and NEPA compliance.

Presenter(s): **Erica Burrin**, *Program Manager*, **Brittany Price**, *Project Officer*, **Derek Schroeder**, *Lead Policy Advisor for Technical Operations, Weatherization and Intergovernmental Programs Office U.S. Department of Energy*

**3:45 pm – 4:00 pm**

**Break**

**4:00 pm – 5:00 pm**

**Subgrantee Monitoring Analysis Overview and Programmatic Peer Exchange**

WPN 20-4 requires Grantees to submit a Subgrantee monitoring analysis overview. Join our panel of Grantee administrators to find out what this entails and how to develop one. We will explore ways to turn monitoring results into useful information to inform training and technical assistance needs.

Presenter(s): **Phil Crow**, *Lead Weatherization QA Monitor; Wisconsin Division of Energy, Housing, and Community Resources*; **Andrew Etue**, *Manager, Weatherization Compliance and Inspections, Washington State Department of Commerce*