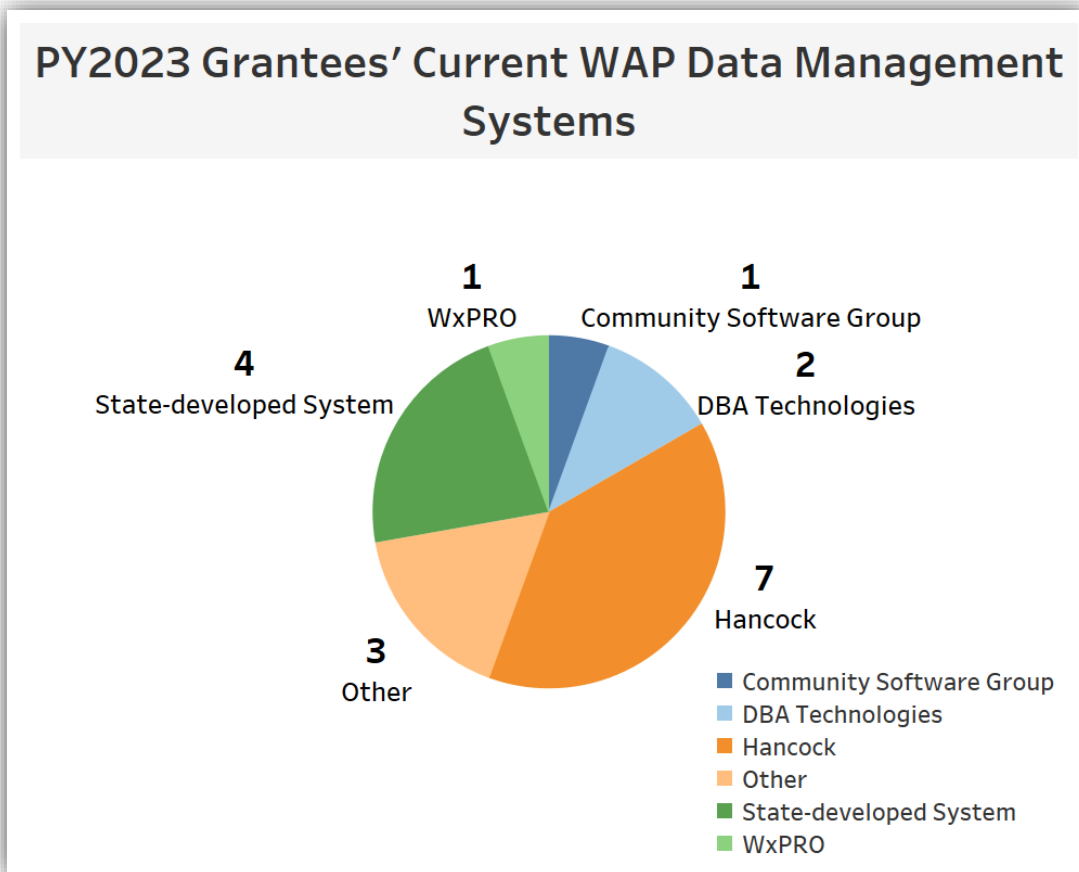


## WAP Data Management Systems

### DOE Special Request – May 2023

28 WAP Grantees responded to a NASCSP information request regarding the functionality and current capacity of Grantee Data Management Systems (DMS). A Data Management System is a tool that can track many different parts of the WAP program and is meant to store, track, and deliver data, and is often used by state administrators and Subgrantees. Having a robust DMS can increase the accuracy and efficiency of a program. Energy modeling or an electronic energy audit tool is used to determine a cost-effective scope of work and can be a component of a DMS.

**State Data Management Systems:** Grantees were asked to provide the status of Data Management Systems in use at their state office. Of the 27 Grantees who gave complete responses, 18 Grantees reported that their state offices had a Data Management System; 3 Grantees reported that they were implementing a DMS at the moment; 5 Grantees reported to use a hodge-podge of spreadsheets and systems, and 1 Grantee reported to be in the RFP process to acquire a DMS. The variety of Data Management Systems used by Grantees are detailed in the graph below, and more information is available in the attached dataset.



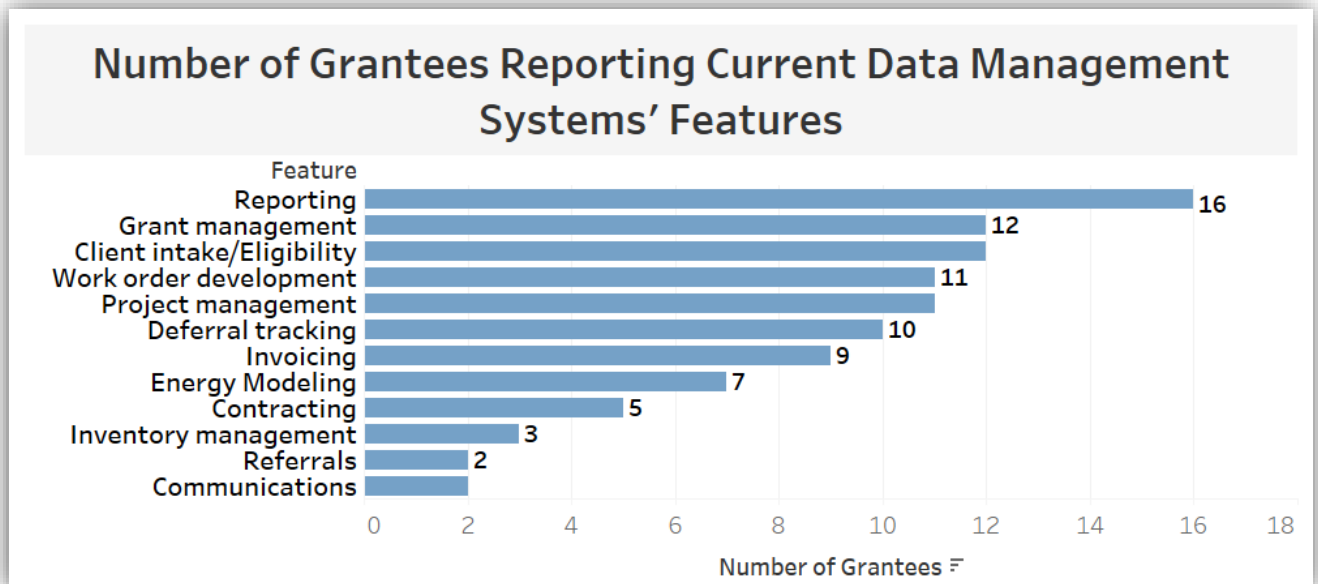
**Subgrantee Data Management Systems:** Grantees were asked whether their Subgrantees used the same DMS as the state. All 18 Grantees who reported having a WAP DMS answered 'Yes.'



**Energy Modeling:** Grantees with a WAP DMS were asked to indicate whether their current DMS had an Energy Modeling component. Half of those Grantees (50%) answered that Energy Modeling was not a part of the DMS and was run separately. Of the remaining Grantees, six Grantees (33.3%) reported that Energy Modeling was embedded as a part of the DMS, while three Grantees (16.7%) reported that Energy Modeling was available on the DMS as an interface linked to another energy modeling engine (i.e., NEAT/MHEA).

**Multiple Funding Sources:** Grantees with a WAP DMS were asked if their current DMS was able to manage and differentiate between the multiple funding sources used by WAP subgrantees (LIHEAP funds, DOE funds, DOE BIL, State funds, Utility funds). 17 Grantees responded 'Yes,' while one Grantee responded 'No'.

**DMS functionality:** Grantees with a WAP DMS were asked to list the features their DMS included. Most Grantees indicated that their DMS had Reporting, Client intake/eligibility, Grant management, Work order development, and Project management (job status tracking) features. Deferral tracking, Invoicing, and Energy modeling were also common DMS features reported by Grantees. The range of features available on Grantees' Data Management Systems are detailed in the graph below, and more information is available in the attached dataset.



**DMS Satisfaction Rating:** Grantees with a WAP DMS were asked to rate their satisfaction with their current DMS. A third of Grantees were neutral about their DMS, whereas another third was either satisfied or very satisfied with their DMS. The remaining third of Grantees were either dissatisfied or very dissatisfied. On average, Grantees gave a rating of 2.9/5 for their current DMS. A summary of the ratings is provided in the graph below, and more information is available in the attached dataset.

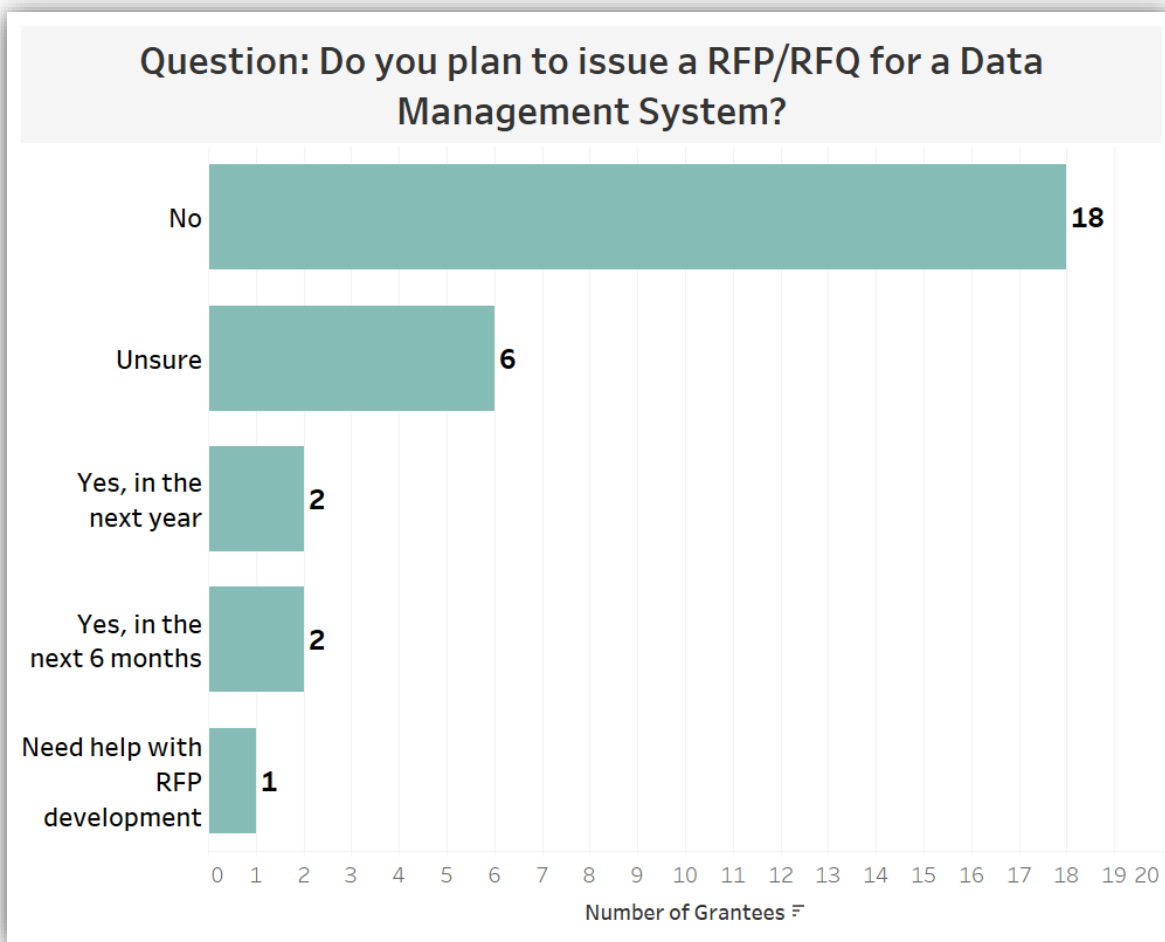


2.9★  
average rating



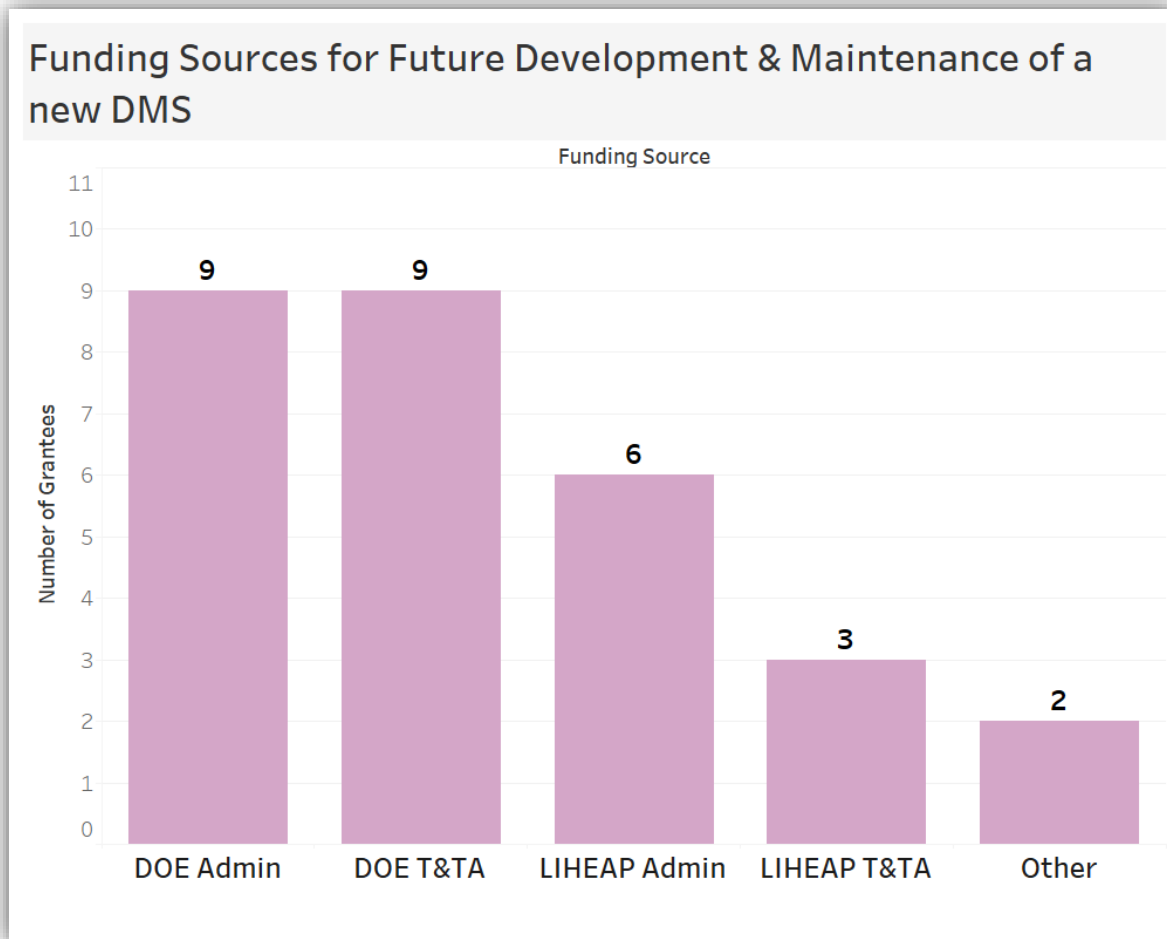
Figure 1. 1 = Very dissatisfied, 2 = Dissatisfied, 3 = Neutral, 4 = Satisfied, 5 = Very satisfied

**Plans to issue RFP/RFQ:** Grantees, with or without a state DMS, were asked whether they planned to issue an RFP/RFQ in the near future. Over half (62.07%) of the Grantees indicated 'No.' 2 Grantees stated that they had plans to issue an RFP/RFQ in the next 6 months; another two Grantees stated that they had plans to issue an RFP/RFQ in the next year. 6 other Grantees said they were 'Unsure,' while one Grantee indicated that they needed help with RFP development. Details of the responses are illustrated in the graph below, and more information is available in the attached dataset.





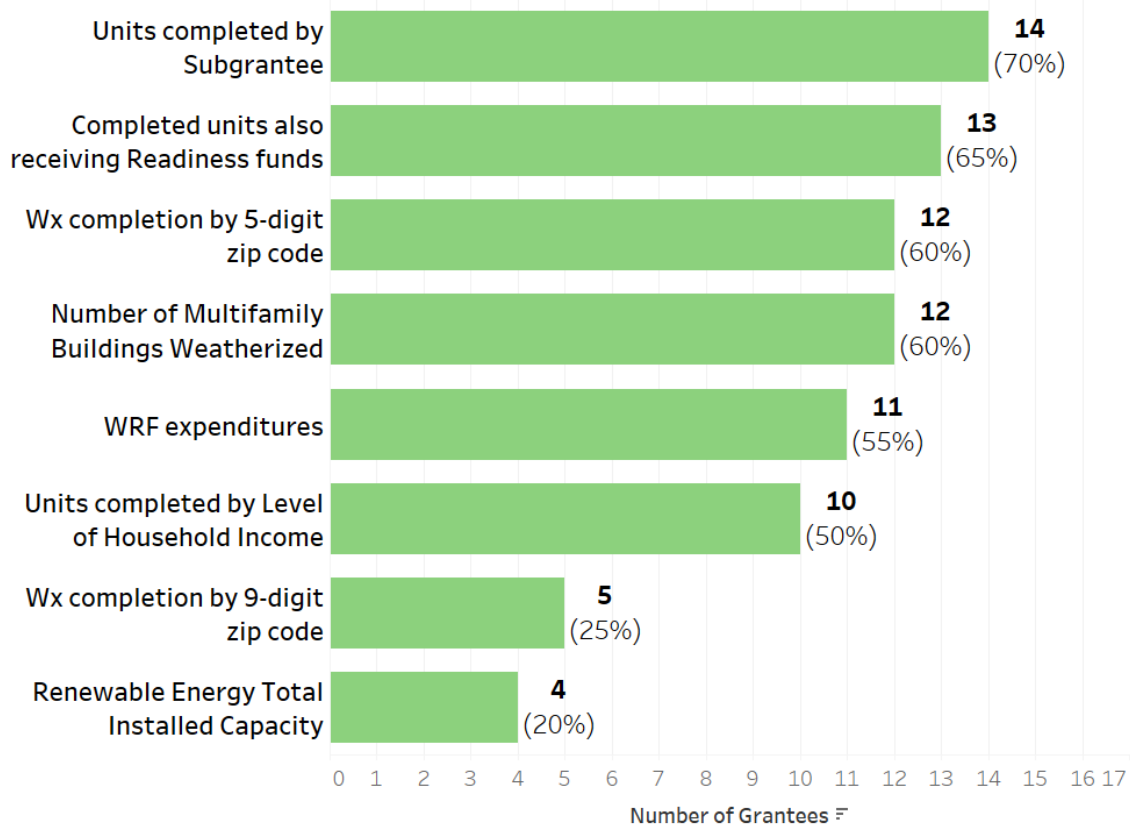
**Funding for DMS Development:** Grantees were asked to provide information about funding for DMS Development. Most Grantees who responded to this question indicated that they intended to use DOE Administrative and/or DOE Technical & Training Assistance (T&TA) funding to support the future development and maintenance of a new DMS. Other funding sources included LIHEAP Administrative, LIHEAP T&TA, and Utility Funds. Most Grantees reported plans to utilize multiple funding sources.



**DOE reporting requirements:** All Grantees were asked which of the new DOE reporting requirements (outlined in WAP Memo 103) their DMS was able to meet. 20 Grantees provided answers to this question. Most Grantees said that their current DMS could track Units completed by Subgrantee, Completed Units also receiving Readiness funds, Wx completion by 5-digit zip code, Number of Multifamily buildings weatherized, WRF expenditures, and Units completed by Level of Household Income. 25% of the Grantees could track Wx completion by 9-digit zip code, and 20% of Grantees could track Renewable Energy Total Installed Capacity. The number of Grantees who reported being able to meet all or some of DOE requirements is summarized in the graph below. For more information, please refer to the attached dataset.



### Number of Grantees Meeting Each New DOE Reporting Requirement



**Estimated development time to meet new DOE reporting requirements:** Grantees were asked to estimate the amount of time they thought it would take for their state office to develop capacity to meet all of the new DOE reporting requirements. 25% of the twenty Grantees who responded said they expected to meet the requirements in the next 0-3 months. Another 30% of the Grantees gave an estimate of 4-6 months. 1 Grantee indicated 7-9 months, 2 Grantees indicated 10-12 months, and the remaining 6 stated that they were unsure. Grantees' estimated development time is summarized in the graph below. For more information, please refer to the attached dataset.



### Grantees' Estimates of Development Time for New DOE Reporting Requirements

