• Sign-in, handouts, name tags, stickers

• Coffee

• Restrooms

• Phones on vibrate or silent
MN State WAP Team

Leadership & Support
Bill Grant, deputy commissioner
Michelle Gransee, manager
Jana, fiscal
Kim Havey, leveraging activities
Mark Fishbaugher: contracted support for WA software

- Jake McAlpine, program coordinator
- Renita Robinson, team lead
- Bill Dixon, Ivan Karnes, and (vacant), field monitors
- Suzy Meneguzzo, administrative monitor
- Ben Tucker, training
THIS MORNING:

• PY16 Review
  • Spending
  • Households Served
  • REEGP
  • Training results
  • Monitoring results

• Network introductions

• PY17 updates
  • Funding levels
  • Planning and production
  • Quarterly calls
  • Policy manual
  • Training
  • Monitoring expectations (field & admin)
THIS AFTERNOON:

- **New Initiatives**
  - Leveraging activities
  - Healthy Air fund
  - ACSI survey
  - Program management software
  - Expanding multifamily efforts

- **Feedback & Regional discussions**
  - Best Practices
  - Specific needs
  - Potential collaborations
Setting the Stage:

• To provide ongoing clarity, consistency, and communication

• Process based approach with the idea of steady continual improvement

• Growth mindset vs. Fixed mindset

• Reactive -> Responsive-> Proactive
PY16 Review: Spending

• Spending (through May):
  • DOE (88.1% spent down)
    • Spent $7.1 M
    • Remaining $956,130
  • EAP/WX A2107 (42.0% spent down)
    • Spent $4.3 M
    • Remaining $5.9 M
PY16 Review: Households Served

• Households Served (estimated through June):
  • DOE unit count: 958
  • Unduplicated unit count: 1,711
  • H&S average
    • DOE $1,354
    • ALL EAP funds $1,998
Households Served = 794*

Housing Types

- Single family - owner: 508
- Manufactured - owner: 186
- MultiFamily: 103
- Single family - renter: 64
- Manufactured - renter: 5
Households Served = 794*

HOUSING TYPES

- Single family - owner 59%
- Manufactured - owner 21%
- MultiFamily 12%
- Manufactured - renter 1%
- Single family - renter 7%
Households Served = 794*

Owner/Renter

80%

20%

Owner

Renter
PY16 Review: Households Served

Households Served = 794*

Fuel Type

- Natural Gas: 516
- Propane: 157
- Electric: 63
- Fuel Oil: 39
- Wood: 14
- Other Fuel: 5
Households Served = 794*

- Natural Gas: 65%
- Propane: 20%
- Electric: 8%
- Fuel Oil: 5%
- Wood: 2%
- Other Fuel: 0%
PY16 Review: Households Served

Households Served = 794*

Federal Priority Designations by household

- Elderly: 362
- Child: 332
- Disabled: 284
- High Energy Use: 109
- High Energy Burden: 80
PY16 Review: Households Served

Total Occupants = 2036*

Number of Occupants

- Child: 836
- Elderly: 419
- Disabled: 334
• Traditional REEGP:
  • $115,640 spent
  • Six outdoor wood boilers
  • Five wood stoves
  • Two wood furnaces

• Service Providers that utilized REEGP funds: TCC, SRC, West Central, SEMCAC, Mahube-Otwa

• Pilot: results still coming in
PY16 Review: REEGP

• PY17 = No REEGP
  • Program ended 6/30/17
  • Funding was not included in the final state budget
  • Results from the Pilot project will be used moving forward
  • Project Stove SWAP as a referral for wood stoves
It was a big year for training:

- 21 Training Events
- ~420 attendees
  - 69 (Tier 1)
  - ~350 (Tier 2)
Tier 1 trainings

• **Energy Auditor** - 2 courses, 10 attendees

• **QCI Course and Testing** - 2 courses, 14 attendees

• **QCI Review and Testing** - 3 sessions, 20 attendees

• **Crew Leader** - 1 training 5 attendees

• **Multifamily QCI** - 2 trainings, 20 attendees
Tier 2 trainings

- Program Walk Through (24)
- Policy Update (59)
- Mid-Year Update (60)
- 5 HVAC Systems Fundamentals (37)
- 2 WA Trainings (~20)
- Minnesota Energy Conference (130)
- Wisconsin Technical Exchange Fair (~15)
- Home Performance Conference (~15)
PY16 Review: Monitoring Results

Background:

• 3 years with new monitoring format
  • Finding, Compliance Issue, Observation

• 2 years with:
  • Restructured policy manual
  • Biannual policy updates and trainings
  • Standard Work Specification
  • Quality Control Inspection process
Finding:

- endangerment of a client
- gross negligence
- possible disallowed cost
- reoccurring Compliance Issues

Includes a citation (MN Policy Manual)

Includes a required action to resolve
Compliance Issue:

• Acts that do not follow applicable policies

Will include a citation (MN Policy Manual)
Will include a required action to resolve
Observation:

- Non-policy related information
- Includes positive change comments and opportunities for improvement

Does NOT include a citation or required action

May include a recommendation
PY16 Review: Monitoring Results

- **Finding**
- **Compliance Issue**
- **Observation**

PY14:
- Finding: 81
- Compliance Issue: 164
- Observation: 146

PY15:
- Finding: 28
- Compliance Issue: 238
- Observation: 165

PY16:
- Finding: 24
- Compliance Issue: 172
- Observation: 128
PY16 Review: Monitoring Results

Findings

PY14: 81
PY15: 28
PY16: 24
PY16 Review: Monitoring Results

Findings

- **Home Assessment**: PY14 = 18, PY15 = 17, PY16 = 11
- **Health & Safety**: PY14 = 9, PY15 = 7, PY16 = 9
- **Heating System**: PY14 = 9, PY15 = 3, PY16 = 1
- **Ventilation**: PY14 = 14, PY15 = 2, PY16 = 1
- **Baseload**: PY14 = 6, PY15 = 2, PY16 = 2
- **Insulation**: PY14 = 10, PY15 = 1, PY16 = 0
- **Air Sealing**: PY14 = 5, PY15 = 0, PY16 = 5
- **Client Services**: PY14 = 2, PY15 = 0, PY16 = 2
- **Quality Control Inspection**: PY14 = 0, PY15 = 0, PY16 = 0

Colors: Red = PY14, Green = PY15, Orange = PY16
PY16 Review: Monitoring Results

Compliance Issue

- PY14: 164
- PY15: 238
- PY16: 172
PY16 Review: Monitoring Results

Compliance Issues

- Home Assessment: PY14=45, PY15=49, PY16=59
- Health & Safety: PY14=26, PY15=22, PY16=23
- Heating System: PY14=24, PY15=25, PY16=18
- Ventilation: PY14=12, PY15=10, PY16=8
- Baseload: PY14=20, PY15=16, PY16=10
- Insulation: PY14=24, PY15=20, PY16=10
- Air Sealing: PY14=8, PY15=7, PY16=4
- Client Services: PY14=1, PY15=0, PY16=4
- Quality Control Inspection: PY14=3, PY15=24, PY16=22
PY16 Review: Monitoring Results

Compliance Issues

- Home Assessment: PY16 49, PY15 45, PY14 26
- Health & Safety: PY16 24, PY15 22, PY14 23
- Heating System: PY16 18, PY15 25, PY14 24
- Ventilation: PY16 8, PY15 10, PY14 22
- Baseload: PY16 16, PY15 20, PY14 2020
- Insulation: PY16 24, PY15 24, PY14 16
- Air Sealing: PY16 8, PY15 20, PY14 7
- Client Services: PY16 1, PY15 4, PY14 0
- Quality Control Inspection: PY16 22, PY15 24, PY14 3
# PY16 Review: Monitoring Results

## PY16 by percent

<table>
<thead>
<tr>
<th>Category</th>
<th>Findings</th>
<th>Compliance Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Assessment</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>Health &amp; Safety</td>
<td>38%</td>
<td>13%</td>
</tr>
<tr>
<td>Heating System</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>Ventilation</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Baseload</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Insulation</td>
<td>0%</td>
<td>14%</td>
</tr>
<tr>
<td>Air Sealing</td>
<td>0%</td>
<td>5%</td>
</tr>
<tr>
<td>Client Services</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>Quality Control Inspection</td>
<td>21%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
PY16 Review: Monitoring Results

Why all the analysis?

What purpose does it serve?

• Focus T&TA efforts
• Identify possible areas of policy revision
• Continuous improvement
• Helps us tell our story
Questions?

weatherization.commerce@state.mn.us
• Monitoring for compliance to DOE and Commerce requirements.
  • Strengthens the program
  • Ensures rules and goals are met

• From the entire State
  • Some were found once; some were found multiple times – minor to major
  • Look at the local Monitoring reports for specifics in your area
• Missing information
  • Data is blank in WA
  • Paper forms are incomplete
• Incorrect modeling
  • Heating plants
• Missing justification for an IRM
• Evaluating SIR for all ECM’s
Shell

No Storm

Unchecked cantilever
• Complete WA Libraries are:
  • Easier to use
  • Make modeling faster
  • Create more accurate work orders
• Incomplete or missing H&S form
• Incomplete or missing H&S info in WA
• Delay in response when combustion spillage hazard is identified
• Filter covers
• Venting clearance
  • B-vent
  • PVC intake & exhaust
• Duct sealing:
  • Lack of mesh tape
  • Thin mastic
Heating

Missing filter cover

Filter cover
Heating

Unsealed MH boot

Sealed MH boot
• Missing ASHRAE tests

• Audit or WA zonal test missing or incomplete
• Lack of metering of refrigerators
• Incomplete pipe wrap
Incomplete pipe wrap

Refrigerator Metering
• Insulation - quality
  • Uneven cellulose
  • Overspray of 2 part foam

• Insulation tag not installed
  • Crawl space
  • Rim
Even insulation
Improperly installed spray foam insulation
Basement

Unsealed rim joist

Sealed rim joist
• Missed air sealing opportunities
  • Unused SIR
  • Moisture reasons in tight houses
• Loose attic hatches
• Ineffective door weather strip
Bypass

Unsealed

Sealed
• Client education on H&S
• LRRP - No documentation of work and no photos
• Missing ASHRAE label
• Insulation tag not installed
• Verification of bag count
• Review of invoice against WA order
• Workmanship issues – SWS compliance
• Review of auditor & contractor test data
  • Zonal pressures, Combustion analysis, Exhaust fan flow
• Photos of completed work
• During the Break:
  • Everyone: Introduce yourself to one person you haven’t yet met
  • Coordinators: meet on the dancefloor (in 5 minutes)
Coordinators Introduce:

- Agency
- Team members here today & their roles
- Share one formal or informal partnership with another Service Provider

Introductions

Renita Robinson | Program Administrator
• **USDOE (WPN 17-2)**
  • Nationally $233 M
    • PY16 $213 M
    • DOE HQ received 3 M

• **Minnesota $9.7 M**
  • PY16 $9.1
  • 6.6% increase over py16
• EAP/WX A2108
  • EAP/WX transfer ~$11.4 M
    • 10% transfer
    • Due to the late final transfer of federal funds to MN EAP
    • Final amount may increase up to an addition 3% (max ~14.8 M)
    • We will have final amounts in a few weeks
Funding Levels

MN USDOE & EAPWX Allocations

USDOE  EAP/WX

0  2,000,000  4,000,000  6,000,000  8,000,000  10,000,000  12,000,000  14,000,000  16,000,000

MN USDOE & EAPWX Allocations

Funding Levels
• Goals:
  • Full spend down of all funds
    • USDOE, A2107, A2108, Propane, Healthy Air
    • Other obligations (CIP, Small Cities, etc.)
  • Meet unit goals
  • Maintain/Improve quality
<table>
<thead>
<tr>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
<th>November</th>
<th>December</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>USDOE (10%)</td>
<td>USDOE (10-13%)</td>
<td>Propane</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**A2107 (10%)**

**A2108 (10-13%)** +3 months

**USDOE (+6% from PY16)**

**Propane**
<table>
<thead>
<tr>
<th>Month</th>
<th>A2107 (10%)</th>
<th>A2108 (10-13%)</th>
<th>USDOE (+6% from PY16)</th>
<th>Propane</th>
</tr>
</thead>
<tbody>
<tr>
<td>July</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>August</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>September</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>October</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>November</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>December</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>January</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>February</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>March</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>April</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>May</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>June</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:
- A2107 is 10% of the total.
- A2108 is 10-13% of the total with a delay of +3 months.
- USDOE is +6% compared to PY16.
- Propane is represented in the table.
PY2017 “Quarterly” check-ins

• Goal
  • Increase effective communication
  • Foster understanding between Commerce and SP’s
  • Create opportunities for action (proactive vs reactive)
PY2017 “Quarterly” check-ins

• Model for PY17
  • One on one conversation
    • typically by phone
  • Non-monitoring setting
  • Commerce will reach out to schedule calls
<table>
<thead>
<tr>
<th>Quarter</th>
<th>Topics</th>
</tr>
</thead>
</table>
| **Quarter 1** | • Review of previous years monitoring results.  
• Identify possible areas for improvement  
• Production planning  
  • A2107 spend down |
| **Quarter 2** | • As needed |
| **Quarter 3** | • Production update  
  • Spend down  
  • Unit goals |
| **Quarter 4** | • Production update  
  • Spend down  
  • Unit goals  
  • A2108 rollover  
  • Close out procedures  
  • End of year planning |
• Section 4.3 Forms

• Added clarification on certain forms when working on rentals
  • Weatherization Service Agreement: Landlord sign, tenant receives a copy
  • Safety Assessment: Landlord sign, tenant receives a copy
  • Client Participation Form: Tenant sign, landlord receives a copy
  • Final Inspection Form: Landlord sign.
Areas of substantive changes for PY17 DOE state plan:

- CAZ & unsealed ductwork
- CAZ & spillage
- Crawlspace
- Manufactured housing

Draft Policies for review

To be incorporated late July
CAZ & UNSEALED RETURN DUCTS

State Plan: “As part of the worst case CAZ test the effect of unsealed return ducts is measured. In cases where return ducts inside the thermal boundary of single family homes cause a negative pressure, action will be taken to reduce the negative pressure. This is typically done through duct sealing or relief venting between the CAZ and the rest of the house.”
CAZ & UNSEALED RETURN DUCTS

*DRAFT* policy: When ductwork causes a negative pressure in the Combustion Appliance Zone (CAZ) the pressure will be relieved through return duct sealing or pressure relief venting between the CAZ the rest of the house.
CAZ & SPILLAGE

State Plan: “Minnesota has developed a detailed procedural document with the help of local building science experts to help guide field staff through the decision making process around health and safety remediation of CAZ and spillage issues.”
CAZ & SPILLAGE

*DRAFT* policy: send out procedural document will be sent out to the network.
CRAWLSPACES

State Plan: “Remediation of odors, viruses/bacteria problems is beyond the scope of weatherization and is not allowed with USDOE funding. If a known agent in a dwelling may create a serious risk to occupants or weatherization workers, then deferral may be necessary. This applies to inaccessible crawlspaces that are within the pressure boundary of the home as determined through pressure testing.”
CRAWLSPACES

*DRAFT* policy: An inaccessible crawlspace is considered outside the pressure boundary of a dwelling when its zone pressure with respect to the outside is less than ___ pa when the dwelling is depressurized to -50 pa.
MANUFACTURED HOUSING

*DRAFT* policy:

When a manufactured home’s design and existing conditions allow, insulation beyond its designed R-values may be added to its belly and/or attic cavities.

Note: Changes have been given preliminary approval by DLI. Will require DLI approval as well.
MANUFACTURED HOUSING CONTINUED...

• All work must meet HUD Standards in 24 CFR 3280 for bottom board, insulation, and attic venting

• Certificate detailing work attached to mobile home and in client file

• Don’t add venting to sealed roof systems

• No Cellulose, no freeze outs--Do no harm
• At tables, review each policy
  • Any proposed changes?
  • Record and announce
Questions?

weatherization.commerce@state.mn.us
PY17: Training Preview

Benjamin Tucker | Training and Technical Assistance Specialist
Training = Increased Energy Savings
Training = Improved Client *and* Worker Health and Safety
Training = Consistent Quality Work &

Efficient and Effective Program Management

MN Energy Conference
Reminder - two types of training:

1) Tier 1
   - Comprehensive, occupation-specific
   - IREC Accredited training provider
   - Proactive, JTA aligned training

2) Tier 2
   - Single-issue, short-term
   - Responsive to network needs
Tier 1: QCI Review and Retesting

- Audience: Currently certified QCI within six months of recertification
- One day review with field testing the same week
- No written test required (if CEUs are up to date)
- At Fond du Lac Tribal and Community College

  - Session 1  Week of 9/25/17
  - Session 2  Week of 10/16/17
  - Session 3  Week of 12/04/17
  - Session 4  Tentative based on need
Tier 1: Energy Auditor (EA) Training

- Audience:
  - **Newer Auditors** to prepare for Building Analyst
  - **Experienced Auditors** to sharpen their skills
- Two weeks (non concurrent)
- In class testing
- At Fond du Lac Tribal and Community College
- Weeks of 11/13/17 and 11/27/17 (+ one in spring 2018-tentative)
Tier 1: New QCI Course and Testing

- **Not currently needed, tentative second half PY17**
- Audience:
  - Staff who will perform inspections
  - Who meet BPI prerequisites
  - Not yet QCI certified
- 5 day training, followed by testing soon after
- At Fond du Lac Tribal and Community College
Tier 2: Mechanical Training

• January-April 2018

• New RFP for trainer

• Will emphasize Hands on and practical
  • Mechanical Air Conditioning/Heat Pump
  • Combustion Safety/ CAZ
  • Ventilation
Tier 2: Multifamily Training

- Training will depend on Audit Approval results and need
  - Multifamily QCI Multifamily Software Training
  - Multifamily Project Management Training
Tier 2: Minnesota Energy Conference

- Designed by Conference Committee
- Audience: All WAP and EAP staff
- Venue Procurement is in process
- Location Brainerd Lakes Area
- Late April, early May or July
- Consider conference committee participation
- CONTENT IDEAS: Technical-Program Management
Tier 2: Mid Year Policy Update

- Audience: Coordinators and lead staff
- Coyote Moon Grill, St. Cloud
- Wednesday January 17, 2018
Weatherization Assistant Training

• WA Curriculum Development planned for PY17
  • Step 1: WA Trouble Shooting: One Day Trainings
    • Opportunity to ask questions
    • 3 Regional Dates
  • Step 2: Curriculum Development
    • First half PY17
  • Step 3: Weatherization Assistant Training
    • Second half PY17
PY17: Administrative Monitoring

Suzy Meneguzzo | Weatherization Administrative Monitor
PY17: Administrative Monitoring

• Visit more Service Providers Annually
• Increased Desk Monitoring
• Quarterly “Calls”
PY17: Administrative Monitoring

Monitoring Schedule

• At least once every 2 years

• May schedule additional visits as needed

• Training and Technical Assistance visits as needed
Pre-Visit Monitoring

• Confirm details 2-4 weeks prior to visit
• Pre-visit Questionnaire
• Requested documents sent 1 week prior
• 2 day on-site visits
On-Site Monitoring

• Two days
• Entrance and exit meetings
• Access to Fiscal Director, ED and WAP Coordinator

• Focus of meeting
  • Fiscal review
  • Production Planning
  • Client files
  • Contractor files
Post-Visit Monitoring

- May request additional information
- Report written and emailed out
- Written response in 30 days
PY17: Field Monitoring

Bill Dixon | Field Monitor
• Minimum 5% total units state wide
• At least once visit per program year
• Monitoring schedule set in July.
• Additional visits as needed
• In-progress visits as needed
PY17: Field Monitoring

• Co-visits
  • More than one field monitor will visit the same dwelling(s)
  • Allow more on-site T&TA

• Split visits
  • More than one field monitor will visit different dwelling(s)
  • Increase monitoring production/reduce the number of monitoring visits

• Joint visits
  • One admin and one field monitor
  • Reduce the number of monitoring visits

• In-progress visits
  • In-progress dwelling(s)
  • T&TA
Pre-Visit Monitoring

• Visits will be set up 2-4 weeks prior
  • List of Household

• Requested documents sent 1 week prior
  • Consistency
  • Preparation
  • Information delivery

• Visits will be 1-2 days

• Adequate Completions from SP
Pre-Visit Monitoring

• File and WA review
  • Forms
  • Documents
    • Testing data, notes, pictures.
  • Measure
    • ECM, HSM, & IRM
Pre-monitoring review

• Identifying recurring issues from previous monitoring letters
• WA Reports
• Review production
• Review completed work with the SWS standards
Preparing for a Site Monitoring Visit

• Review WA reports and work orders
• Correct and clarifications
• Adding notes or comments in WA
• Confirm households time
• Gather equipment
On-Site Monitoring Visit

- Entrance review
  - Client files and WA + Questions
- On-site assurance inspection
  - QCI
- Exit review
  - Review preliminary results + TTA
Post-Visit Monitoring

• May request additional information

• Report issued via email
  • The letter
    • Observations / Compliance Issues / Findings
  • The issues log report
  • The quality assurance form

• Written response in 30 days
• After Lunch
  • Meet back here at 1 pm
  • Rearrange your location according to tent cards
Leveraging Activities

Commitment to increase the amount of non-federal funds obtained to:

• Weatherize additional dwelling units; or

• Increase the scope of the work completed in dwelling units.
Leveraging Activities

• Welcome Kim Havey, Program Leveraging Coordinator

• ½ time on WAP leveraging activities; ½ on CLICERS

• Initial focus:
  • Evaluate leveraging opportunities;
  • Engage stakeholders;
  • Create a leveraging plan; and
  • Implement the plan.
Healthy AIR (Asbestos Insulation Remediation) Program

- $150,000 each year for two years (state funds)
- Remediate vermiculate insulation from WAP eligible households by AHERA certified contractors
- Done in conjunction with federal weatherization assistance program services
- Vermiculite is to be tested before or at time of removal
- RFP for services by end of August

Need from Network:
- List of all households due to vermiculite
- Indication of test results, if any
American Customer Survey Index - WAP Subgrantee Survey

- Developed by USDOE WAP and CFI Group
- Assessed service provider satisfaction with their respective state agency
- Overall federal score = 68; nationwide score = 67; MN score = 76
MN ACSI Survey Results

**Exceptional**
- None (Individual questions only)

**Excellent**
- Distribution of Funds
- Mission Fulfillment
- Trust in State WAP

**Good**
- Training / Technical Assistance
- Communication
- Overall Customer Satisfaction

**Average**
- Monitoring & Corrective Action

**Below Average**
- Partnerships
- Development of WAP State Plan
ACSI Survey Results (WAP Memo 025)

• USDOE Key Directives:

1. Distribute survey results (Energy Conference + today)
2. Initiate communication process (today)
3. Identify specific actions to improve program operations (MWAG)
4. Develop and implement an action plan that:
   • Is developed in conjunction with local Service Providers;
   • Enhances program management and identifies process improvements; and
   • Identifies steps for implementation (include in State Plan)
**PY17: New Initiatives**

*Proposed* **Plan Development**

- Development of WAP State Plan
- Communication
- Monitoring & Corrective Action
- Training / Technical Assistance
- Distribution of Funds

*Proposed* **Timeline**

- September
- September
- November
- January
What about Partnerships?

• Leverage of funds position

• Separate task force (email interest: weatherization.commerce@state.mn.us)

• All network efforts:
  • energy conference (CIP/WAP)
  • Connecting Low-Income Communities through Efficiency and Solar (CLICERS)
  • Trainings, regional calls, individual outreach
Production Management Software

- Originally started in PY15
- PY16 state plan
- Detailed business modeling process
  - MNIT, WAP, and EAP staff
- Network feedback during PY16 mid year
- Procurement process
Program Management Software will be FACSPRO

- Web based
- Multiple modules
- Will combine many currently unconnected WAP functions
  - Previously weatherized lists
  - Wait lists
- Will replace:
  - Many (but not all) eHEAT functions
  - WA work orders and reports
  - The need for monthly WA uploads
PY17: New Initiatives

FACSPRO

• Implementation will take place throughout PY17
  • System to “go live” at the start of PY18
• Commerce staff will be attending our first training next week
• Today we need the following:
  • What are you tracking on spreadsheets?
  • What WA or eHEAT reports are indispensable?
  • Send previously weatherized lists to Commerce for upload.
Questions?

weatherization.commerce@state.mn.us
PY17: Multifamily

Ben Tucker | Training and Technical Assistance Specialist
PY17: Expanding Multifamily

- PY16 Multifamily trainings
  - More MF buildings in MNWAP
- DOE Multifamily Audit Approval
  - Current Approval ends September 31, 2017
  - Possible new audit tool
- Multifamily Process Guidance
Multifamily Building Weatherization Process

• Truly is unique
  • Not just a big single family dwelling

• Increased timeline

• New file requirements
1. Project Eligibility Assessment
2. Building Site Assessment
3. Energy Modelling
4. Procurement
5. Master Work Order
6. Weatherization Assistant (WA) Data Entry
7. Quality Control Inspection
8. Building Commissioning
9. Closing and Reporting the project
Multifamily Best Practices

• Stakeholder identification & coordination
• Complete processes concurrently
• Project management tips & tools

Let Commerce know if you are planning a multifamily building!
Questions?

weatherization.commerce@state.mn.us
THIS MORNING:

• PY16 Review
  • Spending
  • Households Served
  • REEGP
  • Training results
  • Monitoring results

• Network introductions

• PY17 updates
  • Funding levels
  • Planning and production
  • Quarterly calls
  • Policy manual
  • Training
  • Monitoring expectations (field & admin)
THIS AFTERNOON:

- **New Initiatives**
  - Leveraging activities
  - Healthy Air fund
  - ACSI survey
  - Program management software
  - Expanding multifamily efforts
Questions?

weatherization.commerce@state.mn.us
Thank you!