



Department of Energy
Washington, DC 20585

Dear Colleagues,

“Vision is the art of seeing the invisible” – Jonathon Swift.

With Weatherization, it is not only seeing the invisible, but believing and persevering and bringing the invisible to fruition. In 1999, a stalwart group of individuals worked together to launch Weatherization *Plus*, the evolution of this Program from a Program focused primarily on heating and cooling to a Program that took the whole house and whole community into consideration.

We are very proud of the results of this focus and continue to celebrate the achievements of agencies across the country as they have expanded their scope of services and have been able to successfully marry resources to provide greater services to the families and communities we serve.

But, Weatherization has never been a program to rest on its laurels. Our reputation as the leader in residential retrofits is because we continue to challenge ourselves and explore opportunities. We look for the invisible and work with one another to explore opportunities and replicate successes throughout the nation.

In 2005, we once again brought a group of individuals together to discuss the future of the Weatherization Program and where we need to focus time and attention as a network to ensure the future health and success of this program. The following report is a snapshot of those discussions.

The milestones are purposefully not defined with dates or parties to carry out the tasks. Doing so without giving our stakeholders an opportunity to weigh in on these issues would be futile. Also, because of the vastness of our network, we are anxious to discover where some of these activities and initiatives may already be in existence where we might be able to replicate.

This report and the focus of this group will be part of the discussion at the 2005 National Weatherization Training Conference taking place in Atlanta, Georgia, December 11-14, 2005. We hope that you can share your thoughts and opinions with us there. If your schedule does not allow you to participate in Atlanta, we invite you to share your responses with us by sending them to Jean Diggs of my staff at jean.diggs@ee.doe.gov.

My thanks go to the Weatherization *Plus* Planning Committee for their continued commitment to the evolution of this Program. And, my thanks go to you – the dedicated men and women that work everyday to ensure Weatherization Works!

Sincerely,

A handwritten signature in black ink that reads "James R. Powell".

James R. Powell
Acting Program Manager
Weatherization and Intergovernmental Program

Enclosure

WEATHERIZATION^{PLUS} | OUR FUTURE, OUR VISION – *WHERE WE WANT TO BE IN 2010*



Weatherization
Works

Weatherization^{Plus} describes the evolution of the Weatherization Assistance Program from its traditional focus on heating and cooling energy conservation to an expanded focus on whole-house energy usage and whole-community efforts.

The whole-house approach incorporates advanced technologies and addresses the comprehensive energy usage in low-income homes, as well as related health and safety improvements.

The whole-community approach enables Weatherization providers to serve as a resource for community-based efforts to conserve energy, boost economic activity, and improve the environment.

WEATHERIZATION^{PLUS} VISION

With all successful ventures, there must be continual evolution. The Weatherization Program, for almost three decades, has demonstrated its inherent ability to transform and evolve to meet the continual changing needs of the nation's poor. Challenged by today's housing stock, the Weatherization Program continues to seek out technological advancements and creative approaches to address the issues facing the Program. However, while a great deal of emphasis is placed on the activities underway today; the Program prepares to meet the challenges of tomorrow.

In 2005, the Program pulled together stakeholders from all segments of the Weatherization Program network to discuss the next five years of the Program.

The Committee resolves that by 2010 Weatherization would become the center of the nation's Low-Income, Affordable Residential Energy Efficiency delivery network (including renewables) wherein,

- No state or local program would be left behind
- When any housing repair is done, energy efficiency is a considered factor
- All resource efficiencies are considered, including water
- Builders are inspired to build better homes
- Every state/local agency has excellent resources available
- Sustainability is a considered factor in Weatherization decisions

TEAM RESULT

The **Weatherization^{Plus}** Planning Committee was charged to develop clear, concise areas for the next five years that are consistent with the Program Mission and Vision. These strategies will ensure the continued evolution of the National Program through the implementation of **Weatherization^{Plus}**, while ensuring the program meets production goals and captures data that assist in articulating Program results. Thus, providing the basis for continuing Program advancement.

The following three strategies were identified as critical focal points for this next phase of **Weatherization^{Plus}**.

Expanded Resources: Leveraging/Partnerships –

- Strengthen the network capability to develop and pursue partnership opportunities through communications and training and technical assistance;
- Strengthen the network capability to develop leveraging strategic plans based on national and localized commitment to opportunities, needs, and goals (for all regional, state, and local Weatherization offices); and,

- Identify/create/design/plan systematic linkages to other DOE Programs, other Federal Programs, and other stakeholders.

Consistent Delivery of Quality Services –

- Articulate job descriptions for common weatherization positions including education and technical skill requirements and typical salary ranges;
- Establish the technical functions required at the regional, state, and local level instead of, or in addition to, specific position descriptions (this would account for different program management/organizational structures);
- Define a required set of inspections, tests, and documentation that a state monitor and local agency inspector should complete in the field when assessing completed units (to ensure a minimum standard and increase consistency); and,
- Develop a generic set of minimum technical program standards that states could use as is or modify to consistently apply the quality of weatherization services.

National Information Exchange Resource –

- Create a central repository for valuable information/products developed over the years allowing other states/regions to benefit from the wealth of products, materials, and information developed for the Weatherization Program.
- Identify information/materials/mechanisms that will assist agencies in advancing their current programs to encapsulate the vision of **Weatherization^{Plus}** – a whole-house, whole-community program.

WEATHERIZATION PLUS | SUBCOMMITTEE REPORT

EXPANDED RESOURCES: LEVERAGING/PARTNERSHIPS

MILESTONE	WHO	BY WHEN
Strengthen network capability to develop and pursue partnership opportunities through communications		
<ul style="list-style-type: none"> ❶ Define Key Audiences and Players for focused Leveraging-Public Information Campaign (PIC) Component (i.e.: state legislators, commission staff, commissioners, Utility Executives, etc.). 		
<ul style="list-style-type: none"> ❷ Develop targeted information and communication strategies for these audiences – for example, strategically focus site demos for key state’s Congressmen. 		
<ul style="list-style-type: none"> ❸ Identify existing materials in Leveraging components of Targeted Information resources, tailored for utilities or regulators, etc. that can be used as new tools to implement these communications to potential partners and selected sectors. 		
<ul style="list-style-type: none"> ❹ Develop new targeted leveraging information materials and tools as needed. 		
<ul style="list-style-type: none"> ❺ Train states/locals in use. 		
<ul style="list-style-type: none"> ❻ Implement Program/provide materials for Assistant Secretary’s and Secretary’s staged release of materials to key sectors (regulators, home builders, mayors, utilities, etc.). 		
Strengthen network capability to develop and pursue partnership opportunities through training and technical assistance (<i>maintain multi-level national leveraging training – DOE and RO commitment</i>)		
<ul style="list-style-type: none"> ❶ Utilize NCAF Leveraging Conference to coordinate training and plan implementation for the regional and state strategies. 		
<ul style="list-style-type: none"> ❷ Support a technical assistance talent pool of experts through the low-income advocates peer exchange; provide funding for the development and support of this pool and access to it, as required. 		
Strengthen network capability to develop and pursue partnership opportunities through resources. Develop templates, plans, and other tools and make these readily available.		
<ul style="list-style-type: none"> ❶ Leveraged Program Design Information and Analysis: developing reference templates and inventory list of leveraging examples including leveraging success stories, grants writing and fee-for-service training development and presentation, and development of a generic business plan and template for CAA/WX Agency use in specialized markets, etc. 		
<ul style="list-style-type: none"> ❷ Provide information to network regarding data above Training (on use of these resources) to be planned for all national, regional, and if interested, state conferences. 		

EXPANDED RESOURCES: LEVERAGING/PARTNERSHIPS – CONTINUED

<p>③ On-line Resources (coordinate with other WX+ Committees' activities & WAPTAC resources) – indexed, web-based links to: funding program feature index, utility rate case intervention examples, leveraging case studies to contain basic how-tos leveraged program results, or evaluations, regulations, legislation, history, testimony, etc.· With funding aids, establish plan for DOE regular communication with network about this and similar resources· Use as a tool in national, regional, state, and local training.</p>		
<p>Develop leveraging strategic plans based on national and localized commitment to leveraging opportunities, needs, and goals (all regional, state, and local weatherization offices) <i>support targeted state plans and activities including development strategies for partnership activities</i></p>		
<p>① Target nationally supported leveraging training (PIC, etc.) to areas with opportunities and identified resource needs.</p>		
<p>② Develop planning and goal setting tools.</p>		
<p>③ Develop regional and related state/local plans. Omnibus funding for regions to develop a place where states could go to see what other leveraging projects have been funded in states and regions).</p>		
<p>④ Provide DOE support for integrating regional/state/local needs into national leveraging training and resource development strategies.</p>		
<p>Identify/Create/Design/Plan systematic linkages to other DOE and federal programs, or stakeholder communities <i>[Targets: Renewable Energy/Green/Sustainable/Healthy Housing/New Home Standards/Products]</i></p>		
<p>① Identify possible linkages with other Federal programs.</p>		
<p>② Develop planning and goal setting tools.</p>		
<p>③ Provide DOE support for implementing the new tools/procedures.</p>		
<p>④ Include system for identifying opportunities, training/expert support needs in these strategic plans.</p>		

WEATHERIZATION*PLUS* | SUBCOMMITTEE REPORT

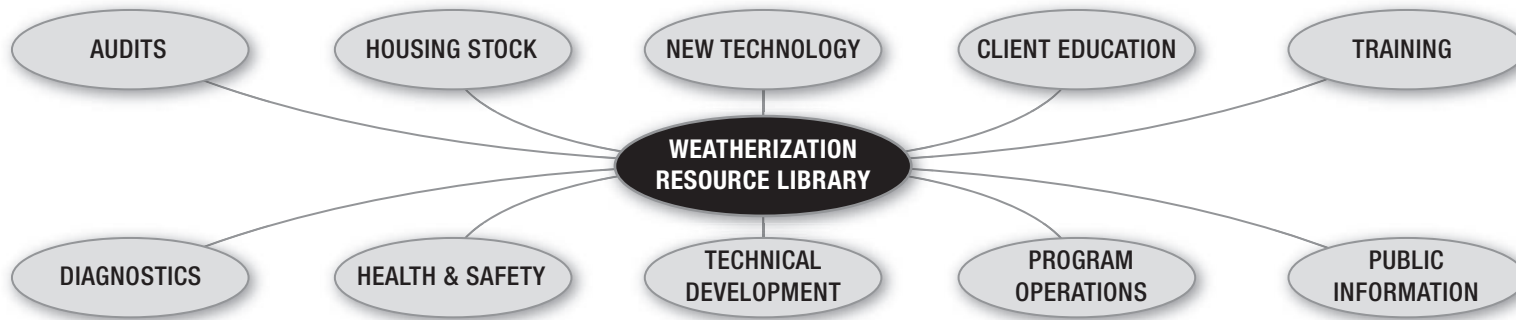
CONSISTENT DELIVERY OF QUALITY SERVICE

MILESTONE	WHO	BY WHEN
TRAINING		
❶ Conduct training needs assessment to develop standardized curriculum.		
❷ Establish job descriptions for common weatherization positions including education and technical skill requirements. Define staff requirements and technical functions that must be carried out at all levels of program implementation.		
❸ Compile peer exchange approaches and make available to network.		
❹ Compile certification approaches and make available to network.		
MONITORING AND INSPECTION		
❶ Establish skills, knowledge, and training that should be required of all state monitors and local agency inspectors assessing the weatherization work of completed units in the field. This item will be conducted as part of the larger effort included under Training above.		
❷ Establish a minimum set of inspections, tests, and documentation that a state monitor and local agency inspector should complete in assessing the weatherization work of completed units in the field.		
❸ Compile monitoring approaches including third-party monitoring, peer monitoring, and database approaches that permit identification of trends in measures, costs, repairs, etc. of completed units.		
LIVING COMPENSATION FOR WEATHERIZATION WORKERS		
❶ Establish job descriptions for common weatherization positions including education and technical skill requirements and salary ranges (item also included under Training).		
❷ Research successful career ladder approaches, common reasons for turnover, and crew vs. contractor impacts on wages.		
❸ Review certification approaches to determine impact on wages.		
OTHER IMPORTANT TASKS		
❶ Develop generic set of minimum technical program standards for states that need them to use and modify.		
❷ Compile existing “best practices” manuals and guidelines and make available to network. Determine if integrating existing best practices into one, generic volume has value for the network.		
❸ For states that need it, develop contract language that spells out local agency technical requirements for weatherization staff qualifications, audits, testing, measure selection and installation, and inspection.		

WEATHERIZATION *PLUS* | SUBCOMMITTEE REPORT

INFORMATION RESOURCE EXCHANGE

MILESTONE	WHO	BY WHEN
<p>❶ Establish Advisory Committee made up of volunteers willing to make an initial one year commitment to this project. Committee would serve as “adjunct staff” to the Information Exchange Resource and would submit items to the “librarian” for posting and procure and identify sources where information may reside that would be appropriate for posting on this site. The Committee will include at least one state and one local agency staff person from each region, federal representation (both RO and Headquarters), and affiliated organizations.</p>		
<p>❷ Identify and consider related resources and possibilities to populate the “library” with established databases (NCLC, Codes, ENERGY STAR, EOS, NCAT).</p>		
<p>❸ Establish library specifics (staff, funding, coordination, site, ensure ease of operation).</p>		
<p>❹ Develop Index & Search Mechanisms – Building on the current Library, http://www.waptac.org/sp.asp?mc=library_overview, categories under consideration include Audits, Client Education, Diagnostics, Health and Safety, Housing Stock, New Technology, Program Operations, Public Information, Technical Development, Training (see attached file for specific map).</p>		
<p>❺ Populating the Site – “Call for Info” at the national conference (providing worksheet for individuals to identify items they currently have in their offices they can contribute to the site), reconfiguring current WAPTAC library to allow users an easy way to submit items for consideration, reconfiguring current WAPTAC library to allow ability to see how many documents are currently housed for specific categories, submitting documents to the “librarian” by the Advisory Committee – specifically documents they use/run across in their day-to-day operations that are appropriate for the site.</p>		
<p>❻ Beta-Test Library – Send library out to Advisory Committee and specific user groups to ensure ease of operation and compatibility.</p>		
<p>❼ Marketing Site and Long-Term Usability – Develop marketing plan for making sure the site is usable, valuable, and updated for the network.</p>		
<p>❽ Feedback Loop – Establishing mechanism to keep the information fresh and identifying areas where research is needed.</p>		



NAME _____ ORGANIZATION _____

TELEPHONE _____ E-MAIL _____

Please indicate the resources you have available to contribute to the Weatherization Resource Library. A Weatherization representative will contact you to coordinate the submission of materials. Thank you!

AUDITS

- Diagnostic Equipment
- Diagnostic Measures
- Evaluations
- Fact Sheets
- Forms
- Guides
- Health & Safety Measures
- Housing Stock
- Presentations
- Reports
- Templates
- Training/Demonstrations
- Work

HOUSING STOCK

- Brochures
- Diagnostic Equipment
- Diagnostic Measures
- Evaluations
- Fact Sheets
- Graphics
- Housing Stock
- Reports
- Training/Demonstrations
- Weatherization Equipment

NEW TECHNOLOGY

- Brochures
- Curricula
- Evaluations
- Fact Sheets
- Forms
- Graphics
- Housing Stock
- News Articles
- Presentations
- Reports
- Training/Demonstrations

CLIENT EDUCATION

- Brochures
- Client Education
- Curricula
- Evaluations
- Fact Sheets
- Forms
- Graphics
- Guides
- Health & Safety Measures
- News Articles
- Presentations
- Reports
- Success Stories
- Templates
- Weatherization Recipients
- Work

TRAINING

- Brochures
- Class Schedules
- Curricula
- Diagnostic Equipment
- Diagnostic Measures
- Evaluations
- Fact Sheets
- Guides
- Health & Safety Measures
- Reports
- Success Stories
- Training/Demonstrations
- Weatherization Equipment
- Work

(continued on next page)

DIAGNOSTICS

- Brochures
- Client Education
- Curricula
- Diagnostic Equipment
- Diagnostic Measures
- Evaluations
- Fact Sheets
- Forms
- Graphics
- Guides
- Templates
- Health & Safety Measures
- Housing Stock
- News Articles
- Presentations
- Press Releases
- Reports
- Success Stories
- Training/Demonstrations
- Weatherization Equipment
- Work

HEALTH & SAFETY

- Brochures
- Client Education
- Curricula
- Evaluations
- Fact Sheets
- Graphics
- Guides
- Health & Safety Measures
- Housing Stock
- News Articles
- Presentations
- Press Releases
- Public Service Announcements
- Reports
- Success Stories
- Training/Demonstrations
- Weatherization Recipients
- Work

TECHNICAL DEVELOPMENT

- Brochures
- Client Education
- Curricula
- Diagnostic Equipment
- Diagnostic Measures
- Evaluations
- Fact Sheets
- Forms
- Graphics
- Guides
- Health & Safety Measures
- Housing Stock
- Inventory
- Monitoring Tools
- News Articles
- Presentations
- Press Releases
- Public Service Announcements
- Reports
- Success Stories
- Templates
- Tool Lists
- Training/Demonstrations
- Weatherization Equipment
- Weatherization Recipients
- Work

PROGRAM OPERATIONS

- Audits
- Databases
- Evaluation Guides
- Fact Sheets
- Financial Training Guides
- Funding History
- Evaluations
- Legislation
- Leveraging
- New Manager Guides
- New Technology
- Presentations
- Press Releases
- Program Notices
- Public Service Announcements
- Reports
- Rules and Regulations
- Success Stories
- Training

PUBLIC INFORMATION

- Client Education
- Curricula
- Evaluations
- Fact Sheets
- Forms
- Graphics
- Guides
- News Articles
- Presentations
- Press Releases
- Public Service Announcements
- Reports
- Success Stories
- Templates
- Training/Demonstrations

List your ideas for any additional items for the library:

WEATHERIZATION *PLUS* | ACKNOWLEDGEMENTS

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