

IBA Home Energy Conservation Program Overview

Client Contact Procedures

- 1) Potential clients identified on IHCDA's system.
- 2) IBA downloads identified potential clients into IBA's system.
- 3) IBA sends a letter to identified potential clients explaining program and telling them to call if interested. Client will get one of four letters depending on their energy assistance renewal date and ownership status.
- 4) IBA Client Services Team will screen and process initial incoming client calls. Approved clients will be forwarded to IBA Production Management Team for auditor selection.
- 5) IBA Client Services Team will generate outgoing calls to potential clients if necessary to meet needed job requirements.
- 6) IBA Client Services Team will process incoming client concern calls and forward information to IBA Production Management Team.
- 7) Submit 30-day updates on all pending clients on IHCDA's system.

Client No Show Procedures

IBA can not reimburse for a trip that results in non-entry into the house. IBA recommends reminder calls before the appointment to minimize these occurrences.

- 1) 1st missed appointment
 - i. Leave IBA door hanger identifying the missed appointment.
 - ii. Call client to reschedule appointment.
- 2) 2nd missed appointment
 - i. Leave IBA door hanger identifying the missed appointment.
 - ii. Notify IBA Production Management Team
- 3) Not allowed entry into the house – Notify IBA Production Management Team

Auditor Procedures

- 2) Auditor will receive notification of potential client from IBA Production Management Team.
- 3) Auditor will accept client and set up initial audit with client as soon as possible.
- 4) Auditor will begin initial audit by conducting a health and safety/deferral inspection using the IBA Health and Safety Inspection/Deferral Checklist and the IBA Moisture Assessment Form. If reason for immediate deferral, auditor will document deferral and end initial audit. Submit reports to IBA Production Management Team.
- 5) If not an immediate deferral, auditor will complete initial audit. Submit reports to IBA Production Management Team.
- 6) If mechanical work is ordered that requires an interim audit, auditor will return to client property to complete an interim audit. Submit reports to IBA Production Management Team.
- 7) Once shell work is completed, auditor will return to client property to complete a final audit. Submit reports to IBA Production Management Team.
- 8) Submit invoices after each submission of deferral audits, initial audits, interim audits, call back audits, and final audits.

Contractor Procedures

- 1) Contractor will receive notification of job from IBA Production Management Team.
- 2) Contractor will accept job and set up appointment with client as soon as possible.
- 3) Contractor will purchase furnaces, water heaters, cellulose and fiberglass through the Indiana Bulk Purchasing Headquarters. Procedures being finalized.
- 4) Upon entering client property, contractor will perform an on-site inspection and call the IBA Production Management Team for approval of any recommended change orders.
- 5) Contractor will complete all approved work order items.

- 6) Contractor will perform a daily safety test out before leaving the property each day. If contractor does not have the equipment required to perform the daily safety test out procedures, they must partner with another approved provider of this service.
- 7) Contractor will perform all required inspections and testing, and complete all required reports following work completion. Submit reports to IBA Production Management Team.
- 8) Contractor will submit invoice to IBA with required certified payroll information.

IBA Production Management Team Procedures

- 1) Monitor county allocations: total, health and safety, and base.
- 2) Assign auditors to client jobs.
- 3) Approve recommended deferrals.
- 4) Approve initial audits.
- 5) Assign contractors to client jobs.
- 6) Approve any recommended change orders.
- 7) Approve interim audits.
- 8) Approve final audits.
- 9) Approve auditor and contractor invoices.
- 10) Conduct quality control inspections.

IBA Reporting and Accounting Team Procedures

- 1) Monitor county allocations: total, health and safety, and base.
- 2) Re-approve all invoices making sure all requirements are met.
- 3) Meet all prevailing wage procedure requirements.
- 4) Submit invoices to IHCDA.
- 5) Pay auditors and contractors once money is received from IHCDA.
- 6) Reconcile all accounts and records.
- 7) Submit all client completion reports to IHCDA.
- 8) Prepare and submit all required reports to IHCDA.

IBA Leadership Team Procedures

- 1) Oversee program.
- 2) Monitor county allocations: total, health and safety, base.
- 3) Develop and revise program policies and procedures.
- 4) Continue building contractor and auditor rosters.
- 5) Respond to client appeals.
- 6) Respond to auditor and contractor issues.
- 7) Respond to IHCDA and DOE inspection requests.

IBA Monitor Team Procedures

- 1) 10% of IBA's jobs are monitored through the state.
- 2) IBA's Monitor Team processes monitor reports and coordinates all fixes. Contractors and auditors originally assigned to the monitored job are required to participate in these fixes.

Additional Resources

- Indiana Community Action Association provides a number of introductory and advanced classes on subjects related to the Home Energy Conservation Program/Weatherization Assistance Program - www.incaa.org
- The Weatherization Assistance Program Technical Assistance Center - www.waptac.org
- U.S. Department of Energy, Energy Efficiency and Renewable Energy: Weatherization Assistance Program - <http://apps1.eere.energy.gov/weatherization/>
- Indiana Housing and Community Development Authority - www.in.gov/ihcda
- Department of Labor – www.dol.gov