

## Background

CFI Group, an independent consulting and market research firm, conducted this study on behalf of the Department of Energy Weatherization Assistance Program (DOE WAP). Founded in 1988 and headquartered in Ann Arbor, Michigan, CFI Group serves global clients from a network of offices worldwide and utilizes the science of the American Customer Satisfaction Index (ACSI). The ACSI is the national indicator of customer evaluations of the quality of goods and services available to U.S. residents. It is the only uniform, cross-industry/government measure of customer satisfaction. Since 1994, the ACSI has measured satisfaction, its causes, and its effects, for seven economic sectors, 41 industries, more than 200 private-sector companies and has measured more than 100 programs of federal government agencies since 1999. This allows benchmarking between the public and private sectors and provides information unique to each agency on how its activities that interface with the public affect the satisfaction of customers. The effects of satisfaction are estimated, in turn, on specific outcomes.

The program objective for DOE WAP was to measure the customer satisfaction of Sub-Grantees from the Department of Energy's Weatherization Assistance Program. Specifically, DOE WAP wanted to measure how well DOE WAP and the State WAP Agencies are delivering services to Sub-Grantees, and how well the State WAP Agencies are supporting local agencies in their mission to assist low-income households with their energy needs. The survey was fielded via email from January 10 to January 31, 2017. A total of 740 surveys were sent and 579 were completed nationally, resulting in a response rate of 78% which is excellent. Measures of this nature typically achieve a response rate of 20-30%.

## Results

Each State Report Workbook is comprised of 3 Tabs: Tab 1. Overview of Results; Tab 2. Scores and Impacts; Tab 3. State Specific Verbatim Comments. While Tab 1 and Tab 3 are self-explanatory, Tab 2 includes the following: the lowest and highest national scores in the study, the national average scores, state specific scores and national impacts.

## Definitions

### **Customer Satisfaction Index (CSI) - Tab 2. Row 42**

The CSI is the weighted average of three questions that ask directly about customer satisfaction. These three questions are the same for each entity that measures customer satisfaction, whether public or private.

1. Overall, how satisfied are you with the services provided by the State WAP Agency?
2. How well do the services from the State WAP Agency meet your expectations?
3. How do the services from the State WAP Agency compare to an ideal grant awarding agency?

**Drivers (of Satisfaction) - Tab 2. Rows 4, 8, 12, 19, 24, 31, 35**

The aspects of the customer experience measured in the survey by a series of rated questions. Drivers for this study include:

1. Development of the WAP Plan
2. Distribution of Funds
3. Technical Assistance
4. Training Provided by Third Parties
5. Monitoring and Corrective Action
6. Partnerships
7. Communication

**Driver Scores - Tab 2. Rows 4, 8, 12, 19, 24, 31, 35**

- Each driver score is the weighted average of several questions within the survey asked on a 1 to 10 scale which is then converted to a 0 to 100 scale.
- For example, the driver score for Development of the WAP Plan is made up of rated questions for extent of involvement, caliber of opportunities and degree to which the plan reflects your input.
- Scores are an index, similar to reporting a temperature. Scores are not percentages.

**Question Score - Tab 2. Rows 5, 6, 7, etc.**

- Average respondent score for questions asked in the survey.
- Questions are asked on 1-10 scale and translated to 0-100.

**Future Behavior - Tab 2. Rows 46, 48**

- Represents the desired behaviors that results from changes in CSI.
- Future Behaviors in this study include:
  1. How confident are you that the State WAP Agency is committed to supporting local agencies in their mission to assist low-income households with their energy needs?
  2. How much do you trust the State WAP Agency to work with you to meet your organization's needs?

**Future Behavior Score - Tab 2. Rows 47, 49**

Average respondent score for each rated future behavior.

**Impact**

Impacts, shown in the last column of Tab 2, are derived from a statistical analysis of the relationship between the drivers and satisfaction using the science of the ACSI methodology. Impacts quantify the relationship between each driver and the Customer Satisfaction Index (CSI). The impact is the predicted change in the CSI score that results from a 5-point change in a driver's score. For example, if the Communication driver has an impact of 2.0, we would expect CSI to increase by 2.0 points when the Communication driver score increases 5 points. In other words, high impact means greater leverage on customer satisfaction, which translates to increased confidence that the DOE WAP is fulfilling its mission of supporting local agencies in their mission to assist low-income households with their energy needs. Note that the impact values were calculated for DOE WAP as a whole in order to provide the most reliable data for all the States in the network as sample sizes were too small to calculate impacts at the State level.

**Future Behavior Impact - Tab 2. Column H. Rows 46, 48**

This number shows the expected change in respondent behavior for every 5-point increase (or fraction thereof) in Satisfaction.

### **Confidence Interval**

- A confidence interval is a range around a sample score that is likely to contain the true population score.
- For this study, the confidence level used is 80%.
- Iowa's Confidence Interval is +/-2. The confidence interval of 2 means that there is an 80% probability that the CSI falls between 79 and 83.

### **Interpreting Scores**

CFI Group recommends that scores be viewed on a continuum and each agency use the results to identify strengths and areas of opportunity. To answer the question on how to interpret a particular score, one can use the below general guideline.

Exceptional: 90-100

Excellent: 80-89

Good: 70-79

Average: 60-69

Below Average: Less than 60

Additionally, Tab 2 contains the National Minimum Score in Column B and the National Maximum Score in Column C for this study. The overall average Customer Satisfaction Index for the Federal Government is 68.

### **Highlights**

1. The Iowa Customer Satisfaction Index is 81, compared to the DOE WAP National Customer Satisfaction Index of 67. The Federal Government average for 2016 is 68.
2. Scores for drivers of satisfaction range from 47 to 91, with Development of the WAP Plan scoring the lowest and Distribution of Funds scoring the highest.
3. Communication is the driver with the highest impact and therefore the most influence on satisfaction at this time. Overall, Iowa's Communication score is strong, at 82, and should be maintained. Where possible, focus improvement efforts on the "usefulness of feedback about work plans-performance-monitoring" which scores lower than the other Communication areas, at 78.
4. Technical Assistance is also a high-impact area with a considerable amount of influence on overall satisfaction. Iowa's Technical Assistance is strong, at 84. Work to maintain this strong performance moving forward.
5. Partnerships is an area where Iowa scores relatively low (63). With a moderate impact on satisfaction, improvements to Partnerships will help to improve Iowa satisfaction. Focus efforts on improving "awareness of efforts to serve eligible households" (64) and the "sufficiency of Agency partnerships with other entities" (58).
6. The comments received provide additional specific feedback that may be helpful in suggesting other improvements the state might undertake.

|  | National |     | National |             | Iowa   |             | National Impact |
|--|----------|-----|----------|-------------|--------|-------------|-----------------|
|  | Min      | Max | Scores   | Sample Size | Scores | Sample Size |                 |
| <b>Sample Size</b>   |          |     |          | 579         |        | 16          |                 |
| <b>Development of the WAP Plan</b>                             | 0        | 80  | 44       | 532         | 47     | 13          | 0.5             |
| Extent of involvement in developing Plan                       | 0        | 78  | 43       | 509         | 46     | 13          | --              |
| Quality of opportunities to participate in developing Plan     | 0        | 89  | 48       | 519         | 49     | 13          | --              |
| Degree to which Plan reflects input                            | 0        | 78  | 42       | 502         | 45     | 13          | --              |
| <b>Distribution of Funds</b>                                   | 21       | 97  | 64       | 572         | 91     | 15          | 0.7             |
| Timing of distribution funds ensured no service interruption   | 11       | 100 | 57       | 568         | 88     | 15          | --              |
| Quality of Agency process for executing grant awards           | 22       | 93  | 63       | 566         | 91     | 15          | --              |
| Timely payment from Agency once award is made                  | 22       | 100 | 71       | 562         | 93     | 15          | --              |
| <b>Technical Assistance</b>                                    | 26       | 96  | 70       | 575         | 84     | 16          | 0.9             |
| Ability to answer questions                                    | 33       | 95  | 72       | 575         | 88     | 16          | --              |
| Timeliness of receiving requested information                  | 26       | 96  | 69       | 574         | 85     | 16          | --              |
| Ability to direct you to useful resources or information       | 37       | 96  | 72       | 573         | 82     | 16          | --              |
| Responsiveness to tech assistance requests                     | 20       | 100 | 73       | 570         | 73     | 16          | --              |
| Clarity and consistency of assistance provided                 | 17       | 96  | 65       | 575         | 78     | 16          | --              |
| Effectiveness of tech assistance provided                      | 19       | 97  | 70       | 572         | 82     | 16          | --              |
| <b>Training Provided by Third Parties</b>                      | 29       | 85  | 66       | 567         | 60     | 16          | 0.1             |
| Accessibility of training                                      | 25       | 87  | 64       | 566         | 63     | 16          | --              |
| Scheduling of training   | 25       | 89  | 61       | 565         | 63     | 16          | --              |
| Cost of training   | 6        | 98  | 63       | 553         | 41     | 16          | --              |
| Quality of training  | 33       | 93  | 74       | 557         | 67     | 16          | --              |
| <b>Monitoring and Corrective Action</b>                        | 37       | 100 | 70       | 570         | 79     | 16          | 0.4             |
| Consistency of monitoring across Network                       | 27       | 100 | 65       | 530         | 76     | 16          | --              |
| Adherence to monitoring plan for on-site visit                 | 31       | 100 | 73       | 563         | 81     | 16          | --              |
| Usefulness of monitoring visits                                | 40       | 100 | 69       | 569         | 79     | 16          | --              |
| Clarity of feedback in monitoring report                       | 35       | 100 | 71       | 568         | 79     | 16          | --              |
| Timeliness of feedback in monitoring report                    | 0        | 100 | 68       | 567         | 85     | 16          | --              |
| Clarity of Corrective Action-Quality Improvement Plan process  | 38       | 100 | 71       | 548         | 76     | 16          | --              |
| <b>Partnerships</b>  | 29       | 91  | 58       | 528         | 63     | 15          | 0.6             |
| Awareness of efforts to serve eligible households              | 25       | 88  | 59       | 524         | 64     | 15          | --              |
| Sufficiency of Agency partnerships with other entities         | 31       | 100 | 58       | 507         | 58     | 14          | --              |
| Effectiveness of partnerships created to better serve clients  | 30       | 92  | 59       | 511         | 66     | 14          | --              |
| <b>Communication</b>   | 33       | 99  | 69       | 576         | 82     | 16          | 2.0             |
| Sufficiency of communication about WAP policies-regulations    | 33       | 100 | 70       | 572         | 88     | 16          | --              |
| Usefulness of feedback about work plans-performance-monitoring | 28       | 94  | 68       | 570         | 78     | 16          | --              |
| Frequency of communication                                     | 31       | 100 | 68       | 573         | 80     | 16          | --              |
| Clarity of communications                                      | 30       | 100 | 67       | 574         | 81     | 16          | --              |
| Responsiveness of Agency staff to info requests                | 33       | 100 | 72       | 574         | 84     | 16          | --              |
| Consistency of responses received                              | 33       | 100 | 68       | 570         | 80     | 16          | --              |
| <b>Customer Satisfaction Index</b>                             | 33       | 96  | 67       | 579         | 81     | 16          | N/A             |
| Overall satisfaction   | 33       | 100 | 69       | 579         | 86     | 16          | --              |
| Compared to expectations                                       | 30       | 94  | 66       | 579         | 79     | 16          | --              |
| Compared to the ideal  | 35       | 94  | 64       | 579         | 78     | 16          | --              |
| <b>Mission Fulfillment</b>                                     | 41       | 100 | 75       | 566         | 88     | 15          | 4.7             |
| Confidence in fulfilling mission to assist low-income families | 41       | 100 | 75       | 566         | 88     | 15          | --              |
| <b>Meet Organization Needs</b>                                 | 30       | 100 | 71       | 576         | 85     | 16          | 5.1             |
| Trust in WAP to help meet organization needs                   | 30       | 100 | 71       | 576         | 85     | 16          | --              |

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| <b>Q4. How could the process of the developing the Plan be improved?</b>  |
| I am new to my position and not sure the extent the previous director was involved.   |
| More formal discussions regarding the plan and its implementation between the state and local agencies. We are given a comment period when the process is almost completed.   |
| Currently, the state (grantee) develops the plan. Then the proposed plan is sent to the sub-grantees for review and comment prior to being presented to the State Commission and the public hearing. As a sub-grantee, it would be beneficial to know what options the State has the authority to propose or request. It is difficult to comment on the plan when you only know what has been written rather than what could be written.  |
| Iowa has an effective way of getting people involved in the program development, no suggestions at this time.   |
| Include the CAP/WX Directors in the development of the plan.  |
| It would be nice to have a set meeting to discuss what is going in the State Plan. Our state does allow for us to attend a public hearing to provide input so I should not complain!  |
| More agency input   |
| Iowa does a great job of developing their state plan. I can think of no areas of the development process that need improvement.   |
| <b>Q5. What training and technical assistance for developing the Plan would you recommend DOE WAP provide to the State?</b>   |
| Steps to initiate any procedural changes. /   |
| IDK   |
| Not knowing what T&TA is currently available to the State makes it impossible to make a recommendation.   |
| The current process is effective.   |
| I believe our State staff is competent to lead our state in developing the state plan.  |
| Meeting for input on plan   |
| Unsure  |
| <b>Q9. What recommendations do you have for your State WAP Agency that would allow you to efficiently bill and/or pay contractors for work on in-progress units completed and inspected prior to the unit being final?</b>  |
| I think they do a very good job.  |
| At this time I think the payment procedures that we have in place at this time ifs very efficient.  |
| IDK   |
| Today's technology has completely changed the way people live and communicate. There are sophisticated software programs for just about everything we do, yet we still use WAMS for reporting, THO for intake, NEAT and MHEA for audits, paper for house files etc. DOE should develop a Weatherization software program to mirror TurboTax. The entire Weatherization process from the application, to the evaluation, to the final report could be under "one roof". It would save thousands of man-hours as well as eliminate the potential for human error. Which, in return, would further maximize the return on every dollar spent for Weatherization. |
| The state is very efficient in paying for work completed. The contractors accept the way the process works which is an improvement from years ago.  |
| none  |
| Our State does an excellent job of getting money to us in a timely manner.  |
| Present procedure works fine  |
| Iowa WAP does an excellent job of making sure funding requests are processed quickly. I see no need for improvement in this area.   |
| <b>Q10. What technical assistance would you recommend DOE WAP provide to the State regarding its grant award process?</b>   |
| Not sure.   |
| IDK   |
| An actual training for new Weatherization Directors and their support staff (accountant, admin. asst. etc.) for reporting, expenditure allowances, close out reporting. More of a how to do.  |
| As a sub-grantee, I'm not familiar with the current TA or award process between the State and DOE.  |
| No suggestions at this time.  |

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| none  |
| None  |
| Present procedure is fine   |
| Unsure  |
| <b>Q17. What additional technical assistance needs would you like the State WAP Agency to address?</b>  |
| They are good about providing needed training.  |
| More consistent technical solutions. Possibly consulting with outside experts to explain the thoughts behind some of the procedures.  |
| I think the technical assistance is adequate  |
| The state of Iowa WAP Agency does a good job providing technical assistance.  |
| Additional Blower Door Trainings. Both initial and advanced offerings. Would also like to see the NEAT Audit Software work with our states accounting software (WAMS). Currently they are separate programs.  |
| none  |
| Satisfied   |
| More detailed training on boilers & electrical issues   |
| Iowa WAP does an excellent job of making trainings available to agency staff as well as providing access to state staff for questions and technical assistance. I believe they are doing a great job and no improvement is needed.  |
| <b>Q22. What recommendations do you have for improving the accessibility and quality of technical training provided by third-party sources?</b>   |
| Easier access.  |
| The major issue that I have is the location of the training facilities to our location.   |
| More organization at the state level to bring regular training to our state, instead of independent searches training opportunities and high travel costs associated with out of state travel.  |
| For programs that do not receive as much funding the costs for required training such as QCI is ridiculously high.  |
| Permit more locations to be able to provide training.   |
| Need to have more third party training sites available. Currently have to travel long distances to get the trainings required for the program. Negotiated costs for the trainings for WX Network staff would benefit the Program as a whole. Currently due to the lack of trainers available, costs are high. |
| none  |
| I would like the State to pay for contracted QCI inspector position's training. Our state pays for staff but doesn't provide for contracted positions.  |
| Needs to be training regionally   |
| If DOE-WAP is going to continue having an on-going relationship with BPI, there need to be more trainings available in more affordable formats and locations.   |
| <b>Q23. What, if any, additional training and technical assistance needs do you want the State WAP Agency to address?</b>   |
| Training for crew members, new personnell.  |
| More clear guidance on NEAT/MHEA audits. Possibly from Oak Ridge.   |
| Provide more training for new coordinators, a more of a how-to-do. Some do not have the opportunity to be trained by previous coordinators due to different situations. Would also like to see a refresher offered periodically.  |
| Blower Door and Advanced Blower Door trainings. More options for the BPI Certifications that are required. Annual State ran WX Conference (we used to have one) would be beneficial.  |
| none  |
| Training has been limited to new staff persons. Would like to see more trainings offered so staff could take refresher courses.   |
| Iowa WAP is doing an excellent job of coordinating trainings that are available. Nevertheless, BPI needs to provide more training opportunities that are conveniently located and priced.   |
| <b>Q30. What, if any, suggestions do you have for how to improve the monitoring process?</b>  |
| make sure their exit meeting and actual reports match.  |

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| Need more open dialog regarding home inspection findings. Also need acknowledgement of finding responses as negotiated several years ago. The State has not complied with what they agreed to do.  |
| none at this time.   |
| Provide positive feedback to CAP Agencies and help them become more successful. Give the CAP agencies as much information as they can on what they want to monitor prior to the monitoring.  |
| I feel that the State Staff in Iowa does an excellent job in their monitoring process. They don't just monitor they teach. They show our staff how we can be better at doing our jobs correctly.   |
| process needs to always be objective, not subjective. that has not always been my experience in the 25 years I have been here.   |
| State does a good job of monitoring agencies. We don't always agree with their findings but we can live with it.   |
| I would like to see more consideration given to explanations given by agency staff to queries during monitoring visits. We often find questions in reports that were previously rationalized by staff during the monitoring visits. This defeats the purpose of having staff present during the visit.   |
| None   |
| Iowa WAP field staff does an adequate job in monitoring considering both monitors have not been with the program for many years. I would like to see more focus placed on what agencies are doing a good job at rather than the sole focus being placed on what agencies are doing incorrectly. (Some improvement has been made in this regard in recent monitoring visits.) |
| <b>Q31. What technical assistance would you recommend DOE WAP provide to the State regarding the grant monitoring process?</b>   |
| not sure.  |
| IDK  |
| More training on how to effectively monitor sub grantees.  |
| What is really important in determining a "finding". For example, if there is language in a contract that needs corrected, it will probably be in all the contracts. That should be one finding, not a finding for each contract.  |
| Iowa doing okay.   |
| Unsure   |
| <b>Q35. What would you like to see the State WAP Agency do to increase partnerships with other government/non-government entities to serve eligible households?</b>  |
| to provide direction/suggestions for local agencies to form partnerships.  |
| Use the State level contacts to develop relationships with other State Departments to help with funding outside the scope of DOE funds, but necessary to help each homeowner receive WAP.  |
| Meet with state and local entities and collaborate with them to see if there are any joint opportunities to increase capabilities to serve low income families.  |
| This is not about the state, but rather DOE. Fuel switching for some clients can be the single most important cost savings/SIR gain available. This should be encouraged by the DOE if the main focus is saving the client energy and money.   |
| I need to give more points to last questions! We do partnership with local utilities and that partnership is great. I don't believe the State has partnered with non-utility companies. I'm not sure who those partnership would involve!  |
| Possibly create partnerships for added funding   |
| I would like to see Iowa WAP increase their outreach to other entities who can provide services that our grant is unable to perform (e.g. roof replacement) that may prevent the local agency from providing WAP to eligible clients.  |
| <b>Q36. What technical assistance would you recommend DOE WAP provide to the State regarding its efforts to build linkages with government/non-government entities to serve eligible households?</b>   |
| pave the way for alliances.  |
| IDK  |
| Help facilitate the initial meetings between entities. Guidance on setup of partnerships.  |
| none   |
| This may be an area that DOE WAP could assist us with. There may be more government/non-government entities we may be able to find to partner with us.   |

Build a data base of agencies/entities that are available to assist local WAP agencies in covering costs that may not be allowable under WAP grants.

**Q43. What kinds of information, if any, would you like to receive from the State WAP Agency staff that you are not now getting?**

Info on trainings provided

Statewide weak areas needing improvement

I feel they are very good at getting the agencies the information needed to run a successful program.

none. I feel very comfortable contacting the state with any questions I have.

They could let us know ahead of monitoring visits what they are finding in other agencies. It seems that most agencies are making the same mistakes. More sharing of information of other agency good/bad systems and approaches.

none

Information regarding available funds from other entities that may cover costs not allowed under WAP grants.

**Q44. What technical assistance would you recommend DOE WAP provide to the State regarding its communication efforts?**

Vendor lists for training.

none

?

none

Unsure

**Q50. What more could DOE WAP do to help the State and local agencies meet the needs of low-income people in the State?**

More clarity in the vision. /

More DOE funding and I would like them to address the average cost per home.

Provide more funding and realistic standards. Training for individuals to accomplish QCI required training (actual course that can be taken - schooling, trade course) as QCI requirements are now it is bringing the network at a stand still or there will be no programs that will meet the requirements.

Provide funding levels that are sufficient with the demands of the communities. Help expand funding partnerships and opportunities to increase the program at the State and Local levels. Review work standards to ensure that some of them aren't actually limiting what the Weatherization Program should be doing. Monitor States more to ensure accountability with in the program. Review required certifications to ensure/verify that we really need them and that requirements aren't "over the top".

reduce regulations, certifications required to do the work, Without these high costs more clients could be helped.

prioritize fuel switching, make indirect costs and other costs associated with running crew based work more attractive. After 25 years, I am totally convinced of the benefit of quality control using crews rather than contractors.

We need to quite spending so much money on health and safety services. The weatherization program should partner with healthy home agencies and let them do the needed health and safety items. We need to concentrate on saving money on energy saving services.

Present priority system doesn't reach all needy clients



Sever the relationship with BPI. It would seem the only entity benefiting from the BPI-QCI inspector requirement is BPI and BPI training centers. I do not believe this relationship has improved the quality of WAP in the state of Iowa but rather has made it more cumbersome. Iowa was providing excellent WAP services with high quality field staff before this requirement was instituted. Since that time many inspectors have retired rather than meet the trivial requirements of the BPI-QCI Inspector certification. This has hindered the ability of many smaller agencies to provide timely WAP services to clients since they were forced to hire certified inspectors from other agencies to provide final inspections, thus prolonging the time to complete homes as well as increasing the overall cost. I believe the BPI-QCI certification requirement has been a huge expense to the WAP program with very little return. In addition, the ASHRAE 62.2 Indoor Air Quality standard has added significant per house cost to WAP projects with very little useful return. Once extra ventilation has been added to many WAP homes where ASHRAE 62.2 requires additional ventilation, the client frequently disables the added ventilation equipment after the final inspection is completed. The funds used to install extra ventilation vary from project-to-project but many homes have \$700-\$2000 in additional costs to meet ASHRAE 62.2. These extra funds, when added together annually at each agency, could have weatherized an additional 10-20 homes per agency depending on average production costs at each individual agency. I believe eliminating the BPI-QCI Inspection certification as well as eliminating the ASHRAE 62.2 Indoor Air Quality component could have a significant impact on the ability of local agencies to provide additional WAP services to the low income residents of our state.