



N A S C S P

NATIONAL ASSOCIATION FOR STATE COMMUNITY SERVICES PROGRAMS

QCI: ARE YOU THERE YET?

Ray Judy - Community Programs Manager- Weatherization
Indiana Housing & Community Development Authority

Steve Nall - Technical Team Leader
Indiana Community Action Association

QCI: ARE YOU THERE YET?



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- How is that Quality Work Plan Implementation going?
- How big is the QCI in the QWP Process?
- How well positioned is your network?
- What are the Obstacles & Lessons Learned?
- What it is like from the training side of QCI?
- **Tier 1** vs **Tier 2** training: What is the difference?

INDIANA QWP IMPLEMENTATION



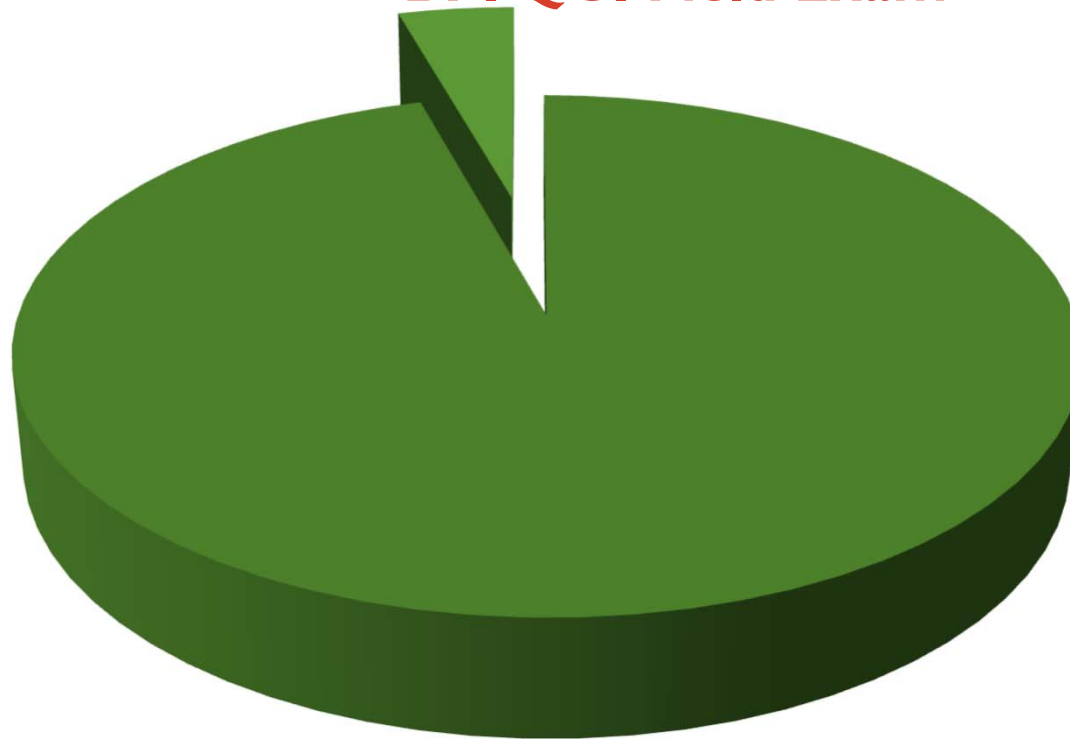
BPI QCI Online Exam



INDIANA QWP IMPLEMENTATION



BPI QCI Field Exam



- 1st Attempt 41
- 2nd Attempt 2
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QCI IN THE QWP PROCESS



- QCI is just another test for Indiana Inspectors. BPI Affiliate since 1997

- Indiana implemented skills verification through BPI in 1998.
 - Retrofit Installer Shell- Dan Hartman, IREC Certified Master Trainer
 - Retrofit Installer Mechanical- Fred Clade
 - Crew Leader- Dan Hartman, IREC Certified Master Trainer
 - Energy Auditor- Tom Andrews, IREC Certified Master Trainer
 - Final Inspector (QCI)- Steve Nall, IREC Certified Master Trainer

- INCAA developed Final Inspector (QCI) course in 2011, QCI testing in 2012

- INCAA became IREC Accredited for QCI in 2013

QCI IN THE QWP PROCESS



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- The BPI QCI is an advanced certification
- ‘Capable Problem Solvers’ make good candidates for Quality Control Inspector
- QCI course will teach you how to inspect, but it is more about refining your process
- QCI Pre-requisite: ‘Successful completion of Energy Auditor course or equivalent’

QCI IN THE QWP PROCESS



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- Many out-of-network QCI trainees do not equate learning to become a ‘capable problem solver’ to being successful in the QCI exam. Many want trained to the test.

- Many out-of-network QCI trainees are not in a hurry to take the exam, but their Managers are

- Many out-of-network QCI trainees learn in QCI class that they should not be challenging the exam until they study & practice a while

- Most out-of-network QCI trainees are so locked in to NEAT/MHEA, they cannot see the building

OBSTACLES



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- Attaining the BPI QCI certification is the goal. Improving the program is not the goal

- Pass the exam so we can get back to doing what we have always done

- Program Managers want to save costs by having trainees test immediately following the training giving the trainee insufficient time to prepare

- There is frustration with not being able to practice what they will be tested on

LESSONS LEARNED



- “Being There” requires more than simply having QCI certified individuals in place
 - Evaluation of processes through feedback from your network
 - How do you maintain enough QCI’s?
 - Retirement, salary issues, moving on to a different position

- Each individual looks at the role of the QCI from a different perspective
 - Energy Auditor vs QCI vs Program Manager vs Executive Director
 - **Whose perspective is correct?**

LESSONS LEARNED



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□ Growing Pains

- Energy Auditor Role
 - What does separation of duties really mean to me?

- Program Manager Role
 - A dual role of QCI and Program Manager is not a good mix

- QCI Role
 - What makes a good QCI candidate?
 - How many sub-grantees are one “event” from being ‘empty handed’?
 - What are the benefits of having multiple QCIs?

LESSONS LEARNED



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- Are you willing to use disciplinary actions when necessary?
 - Indiana has required pay back on two homes
 - Indiana has a Quality Improvement Plan [QIP] process
 - **Weed out those who “just don’t get it”**

- Pressures as funding cycle draws to a close
 - Are inspections compromised?
 - How do QCs respond to pressure to simply ‘sign off’?
 - How disproportionate is the last month or two of the grant?
 - Does this cause Program Manager conflict?

LESSONS LEARNED



- Improvement is happening
 - Contractor overpayment found as a result of QCI process
 - Contractors performing better work to avoid call-backs
 - QCIs developing more thorough inspection processes
 - **The bar of expectation has been raised**

- What comes with improvement?
 - Risk of losing staff or contractors
 - Closing out jobs is an increased time commitment

LESSONS LEARNED



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□ QCI Feedback as a Tool

- Use to evaluate crew/contractor
- Use to evaluate the energy auditor
- Use to evaluate effectiveness of your program
- Do you need to evaluate the QCI with 3rd party QCI inspections?

MANAGER ROUNDTABLE



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- Manager's role in quality control is more time consuming than anticipated

- Not up to speed on technical decisions

- Knowledge of availability of QCI if not working in-house

- Proper and effective communication a must

- Frustrations of the QCI
 - Joining process of work later in the process
 - Dealing with items missed during the initial audit
 - Four to five hours spent for QCI inspection

ENERGY AUDITOR ROUNDTABLE



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- Not accustomed to having their audits receive quality control
- Get to view the QCI report about 25% of the time
- Are in a defensive position all the time because of funding decisions
- Identifies where contractors need to step up (or go home)
- How is this new process going to affect my realized energy savings numbers?

QCI ROUNDTABLE



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- Job descriptions do not reflect present day QCI
- Dislike not being able to see the house up front
- Interim Inspections opens up dialogue and gets everyone on the same page
- Program Managers share monitoring reports about half the time
- Program has evolved and Managers need to know those changes

PROCTOR ROUNDTABLE



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- When candidates are not successful on the online exam
 - Can not make the critical decision
 - What they do every day doesn't mirror the BPI Exam
 - **Not familiar with building diagnostics**

- When candidates are not successful on the field exam
 - Cannot perform building diagnostics
 - Cannot interpret building diagnostic results
 - Cannot perform a worst case CAZ testing
 - Cannot solve CAZ issues
 - Do not really have a 'process' to follow

TIER 1 VS TIER 2



- IREC Accredited course built on a JTA
 - Retrofit Installer Shell
 - Crew Leader
 - Energy Auditor
 - Quality Control Inspector

- Non-Accredited courses that support your JTA built courses

TIER 1 VS TIER 2



- Quality Control Inspector
 - Energy Auditor
 - ▶ Retrofit Installer Shell

TIER 1 VS TIER 2



Retrofit Installer Shell (includes written & field test)

- Daily Safety Test Out Procedures
- Mobile Home Weatherization
- High Performance Insulation
- Zone Pressure Diagnostics
- Introduction To Infrared Thermography
- Lead Safe Weatherization
- Moisture Assessment
- One-on-one Technical Assistance

TIER 1 VS TIER 2



Energy Auditor (includes written & field test)

- Mechanical Systems for Auditors
- CAZ Pressure Diagnostics for Auditors & Heating Techs
- Applying the ASHRAE 62.2
- Carbon Monoxide & Combustion Analysis
- Electric Furnace & Heat Pump Inspections
- Vent Systems & Combustion Air Requirements
- Heating System Airflow Diagnostics
- Introduction to NEAT/MHEA Software
- NEAT/MHEA Field Day
- NEAT/MHEA Test-out Day
- Whole House Heat Load Calculations
- New Furnace Installation Inspections

TIER 1 VS TIER 2



- Quality Control Inspector (test)
 - Energy Auditor
 - ▶ Retrofit Installer Shell
- Ongoing Technical Assistance
 - Phone, email, meetings
- On-Site Technical Assistance
 - One-on-One in field

SUMMARY



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- The QCI is intended to change the Weatherization Program
- **The QCI is the last chance an agency has to get it right**
- Position your network by looking at training holistically
- Get feedback and find solutions for the obstacles
- Engage training for “the rest of the story”
- **Tier 2** training is crucial but it must be consistent with **Tier 1**