



Effective Monitoring

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Andy Etue

Washington State
Community, Trade, and Economic Development



PowerPoint



Common PowerPoint Mistakes

1. People tend to put every word they are going to say on their PowerPoint slides. Although this eliminates the need to memorize your talk, ultimately this makes your slides crowded, wordy, and boring. You will lose your audience's attention before you even reach the bottom of your...uhh...um...



Common PowerPoint Mistakes

1. (continued) ...first slide.



Common PowerPoint Mistakes

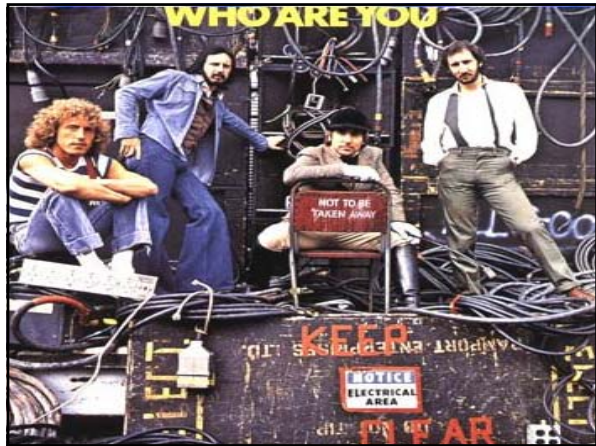

2. Many people do not run spell check before their presentations—BIG MISTAKE!!! Nothing makes you look stupider than spelling errors.



Common PowerPoint Mistakes

3.

•Avoid	•Bullet points	•The Term
•Excessive	•And	•“Bullet Point”
•Bullet	•Your	•Comes
•Pointing	•Key	•From
•Only	•Messages	•People
•Bullet	•Will	•Firing
•Key	•Not	•Guns
•Points	•Stand	•At
•Too	•Out	•Annoying
•Many	•In fact	•Presenters

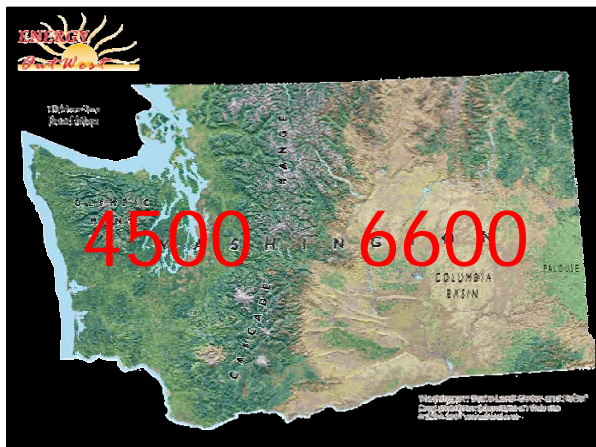

Grant Guidance Requirements

1. State must conduct an annual assessment.
2. Exit conference.
3. Written report.

Bonus PowerPoint Tip → Slide 3 of 487



1. Washington State
2. Tools, Tips, Techniques
3. Hippy dippy whou-whou moonbeam rainbow stuff

Housing Types

1. Mobile homes
2. Single family
3. Multifamily
4. Everything in between



CTED

Washington State Department of Community, Trade, and Economic Development. Housing Improvement and Preservation Unit. HIP. Compliance and Technical Services Section. CATSS.



HIP CATSS



Funding Sources (17 M)

1. DOE
2. BPA
3. HHS
4. Energy Match Makers (State Funds)
5. Utilities



Our Programs

1. Weatherization (WX)
2. Home Repair and Rehabilitation (HRRP)
3. Housing Trust Fund (HTF)
4. Tribal Weatherization (TW)



Our Agencies

1. CAPS
2. Housing Authorities
3. County Governments
4. Tribal Nations



Goals of Monitoring

1. Program delivery
2. Compliance and accountability
3. Analyze program performance
4. Analyze quality of work



Goals of Monitoring

5. Identify strengths at local agencies
6. Better or different (stretches)
7. DOE and state regulations
8. An agent for positive change



Types of Monitoring

1. Desktop Monitoring
2. Subgrantee Visits



Desktop Monitoring

1. Information to the State by subgrantees
2. Save time
3. Performance analysis
4. Review of expenditures
5. Certain compliance issues
6. Identify specific focus areas for agency visit



Subgrantee Visits

1. Fiscal Monitoring
2. Program Specific Administrative and Management Review
3. Field Procedures Monitoring and Job Inspections



Fiscal Monitoring

1. Review financial records
2. Cost allocation plans
3. Review purchasing and bidding practices
4. Review vendor payments
5. Review last fiscal audit (usually not during agency visit)



Administrative and Management Review

1. Review Customer/Client Files
2. Review production, expenditures, and related compliance issues with agency
3. Review material, tool, equipment, and vehicle property and inventory records



Administrative and Management Review

1. Review job flow and scheduling
2. Review safety policies and practices
3. Review insurance policies
4. Inspect warehouse



Field Procedures Monitoring

Analysis of quality of field practices, including

1. Health and Safety issues
2. Diagnostics
3. Overall effectiveness
4. Compliance with audit protocols



Field Procedures Monitoring

Analysis of quality of field practices, including

5. Compliance with State Field Standards
6. Workmanship
7. Appearance
8. Thoroughness



Tools, Tips, and Techniques



The inspector's tool belt



Tools, Tips, and Techniques









Washington State Tools

1. Performance Evaluation Tool
2. Inspection Check List
3. HTF Report
4. Monitoring Report



What are some ways to be more effective?

1. Hard and rigid things are overcome by the relentless application of gentle things. The steady drip drip drip of water.
2. Using your influence will produce commitment. Using authority will produce compliance. With influence your support of others even when you are not around.



3 ways to raise your IQ

1. Increase your value
2. Increase your rapport building skills
3. Create giants of others



Increase value

1. Be a resource
2. Develop your expertise
3. Provide solutions
4. Have a clear mission, vision, goals



Increase Your Rapport Skills

1. Communication: speaking and listening
2. Match and pace: treat others the way THEY want to be treated
3. Find out about the interests of others while being clear about your interests
4. Michael Faraday



Create Giants of Others

1. Deliberately seek to empower others which paradoxically brings out my best.
2. Value the differences in others and acknowledge their contributions.
3. Forcing compliance breeds contempt, working with and influencing encourages support and ownership.



Final thoughts

We must bask in the magnificence of what is seen and sensed, instead of always memorizing and categorizing.



Final thoughts

Live the mystery of Weatherization. Enjoy the Mystery by becoming an absolute observer: judge less and listen more.



Final thoughts

Consciously bring out the best in others which will paradoxically bring out the best in you.

