PROCURING A WEATHERIZATION SOFTWARE APPLICATION – A FORUM

FACILITATED/PRESENTED BY AMANDA MARCOTT-THOTTUNKAL & KAYLA CORNETT – ODOC
JULY 29, 2021

Outcomes of Today’s Webinar:

• To learn why ODOC is purchasing a new weatherization software

• Understand the procurement process and timeline for implementation

• To provide ODOC input on what types of digital and data solutions may make your job easier (or harder) in the office or in the field.
Why do we need a new weatherization software?

Don’t we already have a weatherization software?

CAPTAIN
Application Development Estimated Timeline

July 2021 – July 2022

PROJECT

STARTED

07/2021 – 07/2022

MILESTONE

NASCSUP Submits Draft to ODOC

MILESTONE

Internal ODOC Review

MILESTONE

ODOC Submits to OMBES for Posting

MILESTONE

RFP Posted to Public

MILESTONE

RFP Scored & Awarded

MILESTONE

Initial Meetings & Planning with Vendor

MILESTONE

ODOC Submits to OMES for Posting

MILESTONE

Training Held with Vendor

MILESTONE

Red Line Policies Released

MILESTONE

Agencies begin testing and implementing

MILESTONE

Detailed Policies are Finalized

MILESTONE

100% of agencies are fully using the new application.

Q1

Begin Writing RFP

Q2

Award RFP

Q3

Plan Training, Policies, and Guides

Q4

Train Network & Implementation

JULY

SEP

OCT

NOV

DEC

JAN

FEB

MAR

APR

MAY

JUNE

JULY

ODOC Research
ODOC Needs a way to Manage More Effectively
Job Screen:
- Job cards organize all clients for the selected day
- Scheduling of daily job cards can be assigned from a web accessible portal
- Direct link to GPS directions by selecting the map in each card
- Direct link to contact center for each specific job
- Reschedule with client from calendar button
- Access all job photos organized by category
What would you do with more time?
NEED: Have a program that is created for weatherization that is must easier to customize than OKGrants.

OUTCOME = All reporting (except for financial) will be removed from OKGrants and completed in the new software.

NEED: Ability to digitally/auto generate information that might be taking precious time now – job #s, priority points, blower door targets, quarterly reports, progress reports, etc.

OUTCOME = Save agency and ODOC time, be able to get data quickly to make better program management decisions. Will likely be able to eliminate some client files and all excel spreadsheets.
**NEED:** Pull county level reports by month, year, and program.

**OUTCOME:** = continue to give agencies all the flexibility desired to service counties on a rotating basis and provide ODOC oversight to ensure all counties are served over a period of time.

**NEED:** Develop a statewide digital application submission process (just one option in addition to paper).

**OUTCOME:** = give applicants who call ODOC or a wrong agency a “one stop shop” no matter who they call. ODOC can even help with the applications and marketing.

**NEED:** Real-time agency stats available to all agencies and ODOC with just a few clicks.

**OUTCOME:** Hold agencies and ODOC accountable to spending funds and being compliant with DOE requirements, while giving the public more access and transparency to real time information – ACPU/Spending/H&S %/Number of Units.

**NEED:** Ability to know when an agency is scheduling jobs (whether its started an energy audit, whether a home is in progress, whether its waiting on QCI, or completed)

**OUTCOME:** ODOC will be able to more quickly and easily schedule T/TA and monitorings without constant back and forth between agency and state, and easier work with agency schedule.
KC2  Should we mention here that this could mean less documents to find and upload for these things?
   Kayla Cornett, 7/28/2021

AMT2 Certainly
   Amanda Marcott-Thottunkal, 7/29/2021
NEED: Eliminate the need for StorCloud.

OUTCOME: New application would eliminate the need for StorCloud, to worry about constant changing links, and that strange password/login screen that keeps popping up.

NEED: A solution for work orders, better organization of photos.

OUTCOME: New application would allow agencies an option to create detailed work orders and have a preassigned area for both before and after – its possible no one will have to “label” pictures anymore.

Additional Items ODOC Anticipates Asking for (Not Exhaustive List)

- Generate deferral lists and reports and letters
- Generate wait lists
- Integration with MIP, NEAT/MHEA, potentially CAPTAIN
- Clocking in and out for Crews
- Inventory Management (will make it easier for agencies to buy paint or smoke detectors in bulk)
- Income tables would automatically be built into the software, and could automatically approve an application for income guidelines
- Automatically generate job numbers/ids for each agency
- Will integrate the Field Guide and Energy Audit Manual within the database
- Maintain tracking of all Training and Training Requirements and provide reminders when a training is due.
- Will be able to depreciation and amortize, integrate with MIP
KC3  Outcome is repeated as the box above it.
   Kayla Cornett, 7/28/2021

AMT3 Good catch
   Amanda Marcott-Thottunkal, 7/29/2021
What other things should we be asking for?

Did we meet our outcomes? (POLL)

- To learn why ODOC is purchasing a new weatherization software
- Understand the procurement process and timeline for implementation
- To provide ODOC input on what types of digital and data solutions may make your job easier (or harder) in the office or in the field.