

**CONTRACTING OUT
MONITORING FUNCTIONS**

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CONTRACTING OUT MONITORING FUNCTIONS

State Office Weatherization Team

Georgia Environmental Facilities Authority

Senior Program Manager
Cherry Ivey, Program Manager
Debbie Smiley, Program Manager
Jeffrey Frye, Program Monitor
Program Coordinator
Program Assistant

CONTRACTING OUT MONITORING FUNCTIONS

- Serve 159 Counties

- 22 Sub-grantees
 - 19 Community Action Agencies
 - 2 Local Government
 - 1 Non-profit Agency

CONTRACTING OUT MONITORING FUNCTIONS

- \$124 million in ARRA Funding
- Typical funding: \$4 million annually
- 13,000 units weatherized/3 yrs
- Typical number of units weatherized: 2,000+



CONTRACTING OUT MONITORING FUNCTIONS

■ **Topics Covered Today:**

- *Oversight Objectives*
- *Methods for reaching our goal*
- *Challenges*
- *Solution*
- *Process*
- *Future Directions*

Monitoring Objectives

- Ensure transparency & accountability of weatherization funds
- Ensure program integrity and fiscal responsibility

Oversight:

- Improve program performance through early identification
- Identify potential problems that require additional scrutiny
- Evaluate agency performance controls ensuring reliable basis for validating service deliverables
- Assure financial documentation is adequate & accurate

ARRA Presented Challenges

- Production Increase 2,000>>>>13,000
- Limited staff
- State hiring freeze
- Traditional Model – Keep function in-house

MONITORING SOLUTION

- **Outsource Monitoring**
 - Fulfill state's monitoring objectives
 - Identify state's ability to do the job in a different way.
 - Segmented function into different categories, *(i.e. Fiscal, Administrative, Technical)*
 - geographically dispersed)
 - Increase monitoring frequency

MONITORING SOLUTION & PROGRAM DESIGN

- Issued RFP
 - Awarded to University of Georgia Cooperative Extension Services
- Clearly Defined Scope
 - State produced protocol, monitoring tools
- Educational Component

Monitoring Scope;

- Administration (Program Management)
 - Monthly
 - 10% files
- Fiscal
 - Accounting Contractor
- Technical/Site Monitoring
 - Monthly
 - 14 field evaluation criteria
 - 10% units completed

MONITORING SOLUTION

- Assigned Contract Manager
 - Program Manager
 - State Monitor
- Weekly Updates to State
- Create 26 Jobs
- Monitors disbursed geographically

MONITORING SOLUTION

Controls

- Scope of Work
- Administrative & Fiscal Monitoring
- Site Visits
- Desk Reviews

SUCCESS??

Contractual Agreement

- August 5th
- First Visit will take place in Sept/Oct

CONTRACT MONITORING

- Questions?
