CEDA's Weatherization Client Journey

Presented by:

John Pady

Director of Energy Conservation

Community and Economic Development Association of Cook County

Contact Info:

jpady@cedaorg.net

www.cedaorg.net

Client Journey



Application

- Client goes to Community Partner Site to complete application.
- Partner site utilizes fillable application to complete process.

Completed application is sent to CEDA

Approved Application

- CEDA receives and verifies supporting documentation provided by client.
- CEDA approves or Denies Application.

- CEDA enters client information into Weather Works (State Database and Energy Modeling Software)
- CEDA sends approval letter to client.

Application goes to scheduling department

Scheduling

- Scheduling department contacts client to schedule home verification.
- CEDA Certified Energy Auditor is assigned verification appointment

Verification is completed and approved then scheduling is notified

Energy Assessment is Scheduled

- CEDA Certified Energy Auditor is assigned Energy Assessment
- Energy Assessment is completed and reviewed by Production Supervisor and SOW is sent to Contractor Relations Department.

- Contractor Relations logs project and ships to contractor.
- Contractor receives projects contacts client to schedule Walkthrough.
- Walkthrough is completed.
- The contractor schedules commencement of installation of ECM's and Health and safety measures

Project Installation begins

Installation

 The Mechanical SOW is scheduled and completed.

Architectural SOW follows Mechanical SOW

Contractor returns completed Project CEDA

 Architectural SOW of work is completed.

- Contractor Relations verifies that all required documents are returned with completed project.
- Project is assigned to Certified Inspector.

Inspector schedules inspection with client.

Inspection

- Certified inspector completes inspection and attains all required signatures.
- Inspector ensures client is satisfied with work completed and contractor customer service.

Inspector enters all required information into Weather Works.

Completed Project goes to costing analysis

- Inspector returns competed inspection to Production Manager for review.
- Production reviews and assigns approved measures to proper cost categories.

- The costing analysts prepares all the information for batching to Fiscal Department.
- Fiscal department reviews and submits to Funder.

Project and process closed out.