

Weatherization Program Online System

New Mexico Mortgage Finance Authority

Management Innovation: Technology

HFA Staff Contact

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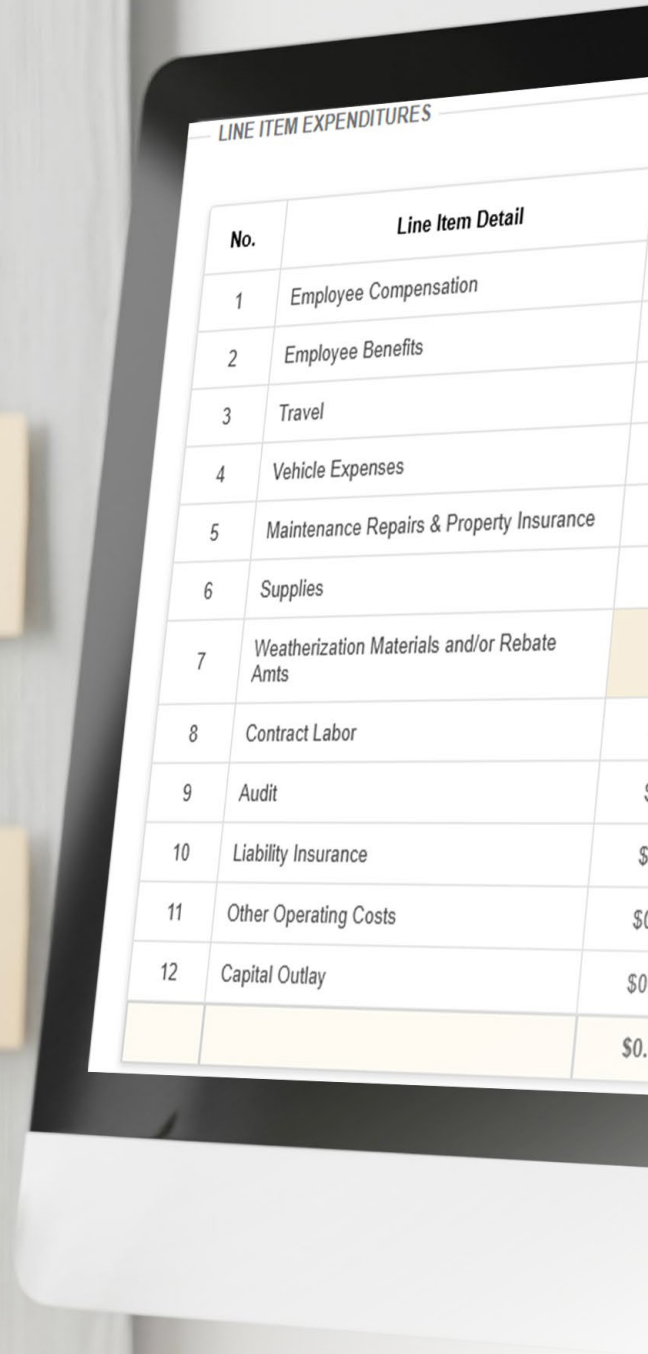
Housing New Mexico

2025 NCSHA Award Submission

ENTRY CATEGORY:
Management Innovation

ENTRY SUBCATEGORY:
Technology

ENTRY NAME:
*Weatherization Program
Online System*



No.	Line Item Detail	
1	Employee Compensation	
2	Employee Benefits	
3	Travel	
4	Vehicle Expenses	
5	Maintenance Repairs & Property Insurance	
6	Supplies	
7	Weatherization Materials and/or Rebate Amts	
8	Contract Labor	
9	Audit	\$
10	Liability Insurance	\$
11	Other Operating Costs	\$
12	Capital Outlay	\$0.
		\$0.



Overview

The Housing New Mexico | New Mexico Mortgage Finance Authority's (MFA's) **Weatherization Program Online System** (the system) was developed in-house to track unit production and expenditures for the Weatherization Assistance Program. Over the years, the system was enhanced to allow the service providers (agencies) to add the measures that were needed to make the home more energy efficient. This allows program staff to track the energy savings for each house. Program managers are able to run specific reports without having to contact the Information Systems Department (I.S.) for any ad hoc data exports. Staff now has the ability to cross-reference reports with program knowledge for accuracy, something that is not as easily accessible with other products. This unified system of invoicing and reporting allows agencies to share challenges and solutions with other agencies and Housing New Mexico.

The System is Innovative

The web-based system was developed in 2002 using technology that offers a centralized hub for managing client applications, tracking project progress, generating reports, and analyzing program performance. At the time of its inception, no other states had a similar system. Companies exist that market products to achieve smaller pieces of the large picture, but these products do not compare to this system, as they lack customization specific to each state's needs.

Replicability of the System

The system is designed with flexible architecture to ensure components can be added upon program demand. This will only be replicable if future designers for other states follow a methodology that has the same discipline(s) used for this system. Because this has been built slowly over the last 23 years, there are historical components that can only be simulated and not replicated. The current state of the system was achieved through the natural demand of multiple changing programs and the unique combination of funding sources. While it may be impossible for an exact replication to be met, other online systems similar in nature may be built. This would minimally require a team of skilled programmers, known data sets, sound website building practices that include an intuitive design, and a programmatic team that is knowledgeable about all the funder requirements and agency needs.

Transforming Management Challenges into Opportunities

Reporting Needs: With an average of eight different funding sources at one time, each having its own set of reporting requirements with staggered deadlines, meeting the individual reporting requirements can be a daunting task. The system allows for ease of data entry by the partners to ensure all necessary information is obtained.

Ad Hoc Information Requests: Many Housing Finance Authorities (HFAs) frequently receive a broad range of requests for information from stakeholders, with each requiring information from different sources. The stakeholder may need this information to solve a specific problem or answer a question, and providing the information in a timely manner is imperative. This system was built to allow program managers to respond to requests that are time sensitive. There is seldom a need to involve the programmers or I.S. when providing these ad hoc reports because the system is user friendly and intuitive. **Figure 1**

Production Tracking: Second to compliance, production is one of the most important metrics to track in order to meet contractual obligations. Production is also a frequent topic of conversation and requests. Program managers need to have this information readily available and easy to

obtain. The system accomplishes this with only a date range and funding source needed to generate an accurate and up-to-date report, which can provide unduplicated completed units, units per funding source, and expenditures by funding source.

Invoicing: Agencies enter grant specific invoices into the system by categorical line item. Not only does this allow staff oversight of accounting practices, but it also helps the agencies know where they stand with expenditures in each category. The system will flag an invoice that has overspent in any one category, allowing for proactive management. This makes invoice approval efficient for Housing New Mexico staff and enables the team to look closely at entry details, questioning costs before the invoice is moved forward for processing. **Figure 2**

Energy Savings Tracking: As part of the invoice entry, the system requires agencies to provide energy savings for each energy-saving measure on all units. This is crucial for reporting to utility sources and verifying program efficacy. Reports may easily be generated for any funding source and time period to provide accurate energy savings by staff.

Ensures Eligible Costs and Measures: Individual measures installed in all units invoiced are entered by agencies. This serves multiple purposes:

- Staff can view what occurred in dozens of homes quickly and effectively.
- Flagged measures and costs are questioned by staff upon invoice submission. This allows for training opportunities, dialogue, rejecting ineligible items, and problem solving.
- Agencies can look back at their invoice entries online to determine what a house received.
- Reports can be generated to determine the number of each measure that has been installed by the agencies over a certain time period or within a county, city, or zip code.

Problem Solving: When there is a need to look at a specific client that may have experienced issues with the program, staff can view what the client received, the costs, who worked on the home, when the home was completed, intake information, and other information about the unit. This allows for more pieces of information to be present before scheduling meetings between the parties involved. **Figure 3**

Client Tracking and Wait List Records: When clients call to request services, agencies and staff can easily go back 20 years to determine if the home has received weatherization in the past, what funding sources were used, and what services the client received. If the number of households on the waitlist is desired, the system can provide the information by city, priority ranking, agency, or date of application in less than three minutes. **Figures 4-9**

Separate Funding Source Management: The system is designed to add an unlimited number of funding sources, which allows agencies to maintain separate records and expenditures for each funding source and is convenient during invoicing and reporting. The system allows for easy leveraging or matching of new funding sources, eliminating double billing. **Figures 10-11**

Internal Controls: The system does not consider invoices fully approved until there are two staff signatures on each invoice. The system also requires two Housing New Mexico Accounting employees to verify agency budgets before they can issue approval.

Large Project Requests: Agencies can easily upload contractor estimates, photos, and descriptions for projects that are above the normal scope of weatherization. This allows staff to understand these projects well enough to issue an approval or denial. **Figures 12-15**

Multifamily Project Entry: Agencies can enter multifamily project demographics, measures, and

savings, which may be easily verified by staff for accuracy.

Monitoring: The system reduces the amount of time funders must spend monitoring Housing New Mexico and agencies, because the system can produce accurate numbers quickly, and the funders do not have to spend time researching the numbers. Units can be flagged for a variety of reasons for required inspections. All inspections are tracked in the system, including findings, concerns, costs and relevant details.

Achieve Measurable Improvements in Agency Operations

Agencies can use the system as a free financial tool that replaces expensive alternatives. Different levels of management can see more information about the completed homes resulting in higher quality work and services. Many of the same benefits staff sees with this system are also reaped by the agencies, such as invoicing, project entry, internal controls, wait lists management, separation of funding sources, client tracking, problem solving and invoicing.

By helping agencies maintain clear budgets for each funding source, the system allows the agencies to better organize their invoices, making it easier to balance against their general ledgers. Agencies can submit invoices with greater accuracy and in less time than it would take using their own financial systems. The agencies can easily and accurately track Average Cost Per Unit, which eliminates the last-minute scramble to find less expensive units to complete.

Benefits that Outweigh Costs

Paying an outside source to accomplish what this system produces would be a drain on the administrative budget. When staff can run reports, not only is there a major difference in monetary savings, but staff is able to obtain more information in a shorter amount of time. There are also potential labor costs to maintain and develop an outsourced system that are costly and can cause periods during which time the system is down for maintenance. Customized in-house maintenance of this system is tailored to work with the program schedules preventing costly work delays.

Resources are Used Effectively

By allowing program managers to generate their own reports and communicate with the I.S. team, it frees up time involved having to log-in to outside systems and explain how the report should look. Users have the ability to find the exact information needed and eliminate costly back-and-forth dialogue. This also frees up the I.S. team to focus on projects that have higher priority. The system is used as a tool when applying for more funding, because existing funding sources recognize the effective use of these resources.

Strategic Objectives are Achieved

The system is instrumental in helping Housing New Mexico achieve several strategic goals.

- The system drives the I.S. team to implement state-of-the-art technology by responding to the variable reporting demands and constituent requests.
- By nature of the programs used, the system must maintain reliability, and at the same time, protect client data.
- The system is designed to maintain financial stewardship and efficient business practices.
- Communication among several departments that use the system helps maintain a healthy, dynamic, team-oriented environment.

VISUALS

Figure 1 Ad Hoc Information Requests and Reports

Data Exports

Exports

- Application Demographics
- Denied Applications
- El Paso Electric Installed Measures
- Installed Measures
- PNM and NM Gas Measures
- Production Expenditures
- Production Units Completed

Date Selection:

- Previous Month
- Current Month
- Program Year
- Fiscal Year
- Calendar Year

Date Start:*

Date End:*

EXPORT

Figure 2 Invoice by Category and Line Item

LINE ITEM EXPENDITURES								
No.	Line Item Detail	Admin	QPS	Leverage	HS	TTA	WRF	Total
1	Employee Compensation	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2	Employee Benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3	Travel	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4	Vehicle Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
5	Maintenance Repairs & Property Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	Supplies	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	Weatherization Materials and/or Rebate Amts	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	Contract Labor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	Audit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	Liability Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
11	Other Operating Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
12	Capital Outlay	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

PREVIEW CHANGES
SAVE CHANGES
CANCEL CHANGES

Figure 3 Problem Solving: General Client Info

CLIENT INFO	CLIENT INFORMATION	
HOUSEHOLD/UNIT	Application Date: 2/22/2024	Vacant Unit: <input type="radio"/> Yes <input checked="" type="radio"/> No
OTHER HOUSEHOLD MEMBERS	Client First Name: First Name	Client Last Name: Last Name
RANKING	Phone Number:	Email:
WEATHERIZATION MEASURES*	ADDRESS	
	Street Number: 615	Street Direction: -
	Street Name: Jefferson	Street Type: ST
	City/Pueblo: ALBUQUERQUE	Quadrant: NA
	County: BERNALILLO	Apt #:
	ZIP: 87107	
	ADDITIONAL INFO	
	Disabled: <input type="radio"/> Yes <input checked="" type="radio"/> No	Gross Monthly Income: \$2,303.30
	Nationality: Hispanic	Source of Income: Employment
	Age: 35	Rent/Own: <input type="radio"/> Rent <input checked="" type="radio"/> Own
	Application Status: Completed	

Figure 4 Client Tracking: Household Unit Summary

CLIENT INFO	Utility/Heat				
HOUSEHOLD/UNIT	Utility/Provider	Type of Fuel	Home Energy	Account #	Primary
OTHER HOUSEHOLD MEMBERS	PNM	Electric		0319523118-0319025-1	<input type="checkbox"/>
RANKING	HOMESTEAD MH COMMUNITY	Natural Gas		INCLUDED IN RENT	<input checked="" type="checkbox"/>
WEATHERIZATION MEASURES*	Dwelling Type: Owner-Occupied Mobile Home				
PNM*	House Floor Area: 1280.0000			012345610-123123-1	
	Average Monthly Heating Bill*: \$20.00				
	Utility Waiver has been signed: <input checked="" type="checkbox"/>			058523118-0319025-1	
	Has this dwelling received DOE Weatherization in the past?: <input type="radio"/> Yes <input checked="" type="radio"/> No				
	If yes, date weatherized: MM/DD/YYYY				
	In what year was this house built?: 1993				
	Unit Condition: In moderate need of weatherization				

Figure 5 Client Tracking: Other Household Members

CLIENT INFO																	
HOUSEHOLD/UNIT																	
OTHER HOUSEHOLD MEMBERS	<table border="1"> <thead> <tr> <th>Name of Household Member</th> <th>Age</th> <th>SSN</th> <th>Nationality</th> <th>DOB</th> <th>Gross Monthly Income</th> <th>Income Source</th> <th>Disabled</th> </tr> </thead> <tbody> <tr> <td colspan="8"> </td> </tr> </tbody> </table>	Name of Household Member	Age	SSN	Nationality	DOB	Gross Monthly Income	Income Source	Disabled								
Name of Household Member	Age	SSN	Nationality	DOB	Gross Monthly Income	Income Source	Disabled										
RANKING																	
WEATHERIZATION																	
MEASURES*																	

Figure 6 Client Tracking: Agency Entry Ranking

CLIENT INFO	
HOUSEHOLD/UNIT	
OTHER HOUSEHOLD MEMBERS	
RANKING	<p>Ranking Reports DISPLAY RANKING SHEET</p>
WEATHERIZATION	
MEASURES*	
PNM*	

Comments (e.g. Why total household income is \$0.00)

Figure 7 Client Tracking: Ranking Report

RANKING SHEET

APPLICANT'S NAME: Client Name	JOB NUMBER: TAOSCNM#2024-0001
---	---

1. Families with children	
0 Families with children Points Earned	0
2. Disability	
0 Disabled family member(s)	0
3. Elderly	
84 +	5
4. High Energy Burden - (Average MONTHLY UTILITY EXPENSE / TOTAL GROSS INCOME) * 100	
	0
TOTAL	5

Figure 8 Client Tracking: Weatherization Summary

CLIENT INFO HOUSEHOLD/UNIT OTHER HOUSEHOLD MEMBERS RANKING WEATHERIZATION MEASURES*	Job Number	11-7676		
	Auditor Name	Auditor Name	Auditor Time 4.00	
	Inspector Name	Inspector Name	Inspector Time 2.00	
	Total Crew Hours	59.00	Date Completed 2/13/2025	
	Cumulative SIR	2.2600	LIHEAP SIR 2.2600	
	Estimated Dollars Saved	\$611.00		
		Age of house does not meet requirement		
	SHPO/THPO Review Required	<input type="radio"/> Yes <input type="radio"/> No		
	SHPO/THPO Review Determination	No Historic Properties affected		
	Comments			

Figure 9 Client Tracking: Installed Measures

CLIENT INFO HOUSEHOLD/UNIT OTHER HOUSEHOLD MEMBERS RANKING WEATHERIZATION MEASURES* PNM*	Measure	Actual Material Cost	Actual Labor Cost	Total Act Cost	Est. Material Cost	Savings to Investment Ratio (SIR)	Est. Energy Savings Heating (MMBTU)	Est. Energy Savings Cooling (Kwh)	Est. Energy Savings Baseload (Kwh)	Amount	Amount2	Type	Funding Source
	Incidental Repairs	\$57.05	\$37.00	\$94.05	\$95.00	0.00	0.00	0.00	0.00	FLOOR REGISTERS			Federal LIHEAP - 2024
	Incidental Repairs	\$38.42	\$18.50	\$56.92	\$60.00	0.00	0.00	0.00	0.00	LOCKS			Federal LIHEAP - 2024
	General air sealing	\$57.11	\$37.00	\$94.11	\$95.00	11.36	9.80	217.00	0.00	PRE-3215	POST-882	T-1000	Federal LIHEAP - 2024
	Furnace Replacement	\$500.00	\$0.00	\$500.00	\$500.00	1.94	6.30	0.00	0.00	NAT GAS	45KBTU	MHDR_2025370654	Federal LIHEAP - 2024
	Duct Sealing	\$68.55	\$74.00	\$142.55	\$145.00	1.37	2.00	22.00	0.00	PRE-3.6	POST-0.7		WAP - 2024
	Door Replacement	\$204.69	\$92.50	\$297.19	\$370.00	1.11	1.20	110.00	0.00	FOOR EAST			Federal LIHEAP - 2024
	Window Replacement	\$2,939.00	\$0.00	\$2,939.00	\$2,939.00	1.09	10.40	775.00	0.00	QTY-13	SWS3 1202.1A,B,C,D		WAP - 2024
	CO Detector	\$89.94	\$37.00	\$126.94	\$130.00	0.00	0.00	0.00	0.00	QTY-2	H&S		WAP - 2024
	Smoke Detectors	\$56.64	\$18.50	\$75.14	\$775.00	0.00	0.00	0.00	0.00	QTY-2	H&S		WAP - 2024
Mechanical Ventilation	\$334.62	\$701.25	\$1,035.87	\$1,040.00	0.00	0.00	0.00	0.00		H&S		Federal LIHEAP - 2024	
Other Health and Safety Items	\$0.00	\$152.83	\$152.83	\$155.00	0.00	0.00	0.00	0.00	OVEN TUNE UP	H&S		Federal LIHEAP - 2024	
		\$4,346.02	\$1,168.58	\$5,514.60	\$6,304.00	16.87	29.70	1124.00	.00				

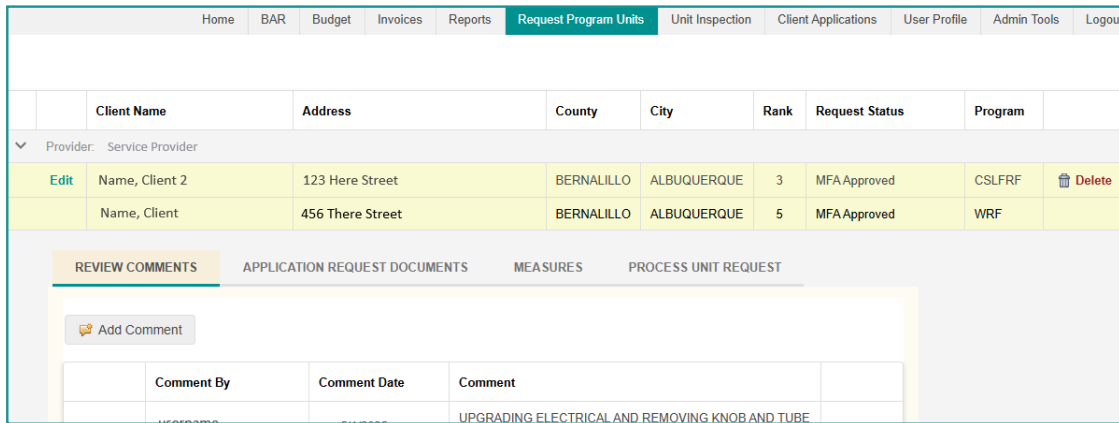
Figure 10 Funding Source Management: New Mexico Gas (Utility Funder)

CLIENT INFO HOUSEHOLD/UNIT OTHER HOUSEHOLD MEMBERS RANKING WEATHERIZATION MEASURES* NM GAS	Measure	First Year Saved	Actual Material Cost	Actual Labor Cost	Total Actual Cost	Est Material Cost	Deemed Lifespan	Total Lifetime	Reason
	Low Flow Shower Heads	4.30	\$36.98	\$25.00	\$61.98	\$301.00	10	430.000	
	DHW Tank Insulation	2.60	\$0.00	\$26.00	\$26.00	\$0.00	10	260.000	
	DHW Pipe Insulation	.90	\$0.00	\$26.00	\$26.00	\$0.00	10	90.000	
	Attic Insulation	6.20	\$625.47	\$450.00	\$1,075.47	\$1,085.00	25	1550.000	
	General air sealing	10.00	\$477.15	\$525.00	\$1,002.15	\$0.00	11	110.000	
	CO Detector	.00	\$104.44	\$25.00	\$129.44	\$0.00	0	0.000	
	Dryer Venting (H&S)	.00	\$32.46	\$25.00	\$57.46	\$0.00	0	0.000	
	Furnace Tuneup	.00	\$11.92	\$208.00	\$219.92	\$0.00	5	0.000	
	Smoke Detectors	.00	\$0.00	\$25.00	\$25.00	\$0.00	0	0.000	
	Mechanical Ventilation	.00	\$256.14	\$200.00	\$456.14	\$0.00	0	0.000	
		24.000	\$1,544.56	\$1,535.00	\$3,079.56	\$1,386.00		2440.000	

Figure 11 Funding Source Management: PNM (Utility Funder)

CLIENT INFO HOUSEHOLD/UNIT OTHER HOUSEHOLD MEMBERS RANKING WEATHERIZATION MEASURES* PNM*	OLD REFRIGERATOR SPECIFICATIONS				NEW REFRIGERATOR SPECIFICATIONS				LED INSTALLATION			
	Metering kWh	<input type="text" value="1319"/>	Metering in kWh	<input type="text" value="396"/>	Metering in kWh	<input type="text" value="396"/>	5.6W	9W	11W			
	Size (in cubic feet)	<input type="text" value="20"/>	Size (in cubic feet)	<input type="text" value="20"/>	Size (in cubic feet)	<input type="text" value="20"/>	Kitchen	<input type="text" value="0"/>	<input type="text" value="8"/>	<input type="text" value="0"/>		
	Age (in years)	<input type="text" value="31"/>	Model	<input type="text" value="ET20TKXBN00"/>	Model	<input type="text" value="GIE21GTHWW"/>	Living Room	<input type="text" value="5"/>	<input type="text" value="8"/>	<input type="text" value="0"/>		
	Model	<input type="text" value="ET20TKXBN00"/>	Manufacturing Code	<input type="text" value="E02318090"/>	Manufacturing Code	<input type="text" value="MZ605834"/>	Bedroom	<input type="text" value="0"/>	<input type="text" value="12"/>	<input type="text" value="0"/>		
	Manufacturing Code	<input type="text" value="E02318090"/>	Price	<input type="text" value="\$1,114.00"/>	Price	<input type="text" value="\$1,114.00"/>	Bathroom	<input type="text" value="0"/>	<input type="text" value="4"/>	<input type="text" value="0"/>		
	Comments											
	<input type="text"/>											
	<input type="radio"/> Rebate <input checked="" type="radio"/> Whole Home											
	Measure	Quantity	First Year Saved	Actual Material Cost	Actual Labor Cost	Total Actual Cost	Deemed Lifespan	Total Lifetime	Reason			
	General air sealing	0	71.00	\$19.53	\$0.00	\$19.53	11	0.000				
	Window Replacement	6	563.00	\$351.88	\$0.00	\$351.88	25	844500.000				
	Other Health and Safety Items	0	.00	\$27.58	\$18.50	\$46.08	0	0.000	DRYER VENTING			
Other Health and Safety Items	0	.00	\$504.24	\$420.90	\$925.14	0	0.000	MECHANICAL VENTILATION				
	634.000	\$903.23	\$439.40	\$1,342.63			844500.000					

Figure 12 Large Project Requests: Describing the Request



Home BAR Budget Invoices Reports **Request Program Units** Unit Inspection Client Applications User Profile Admin Tools Logout

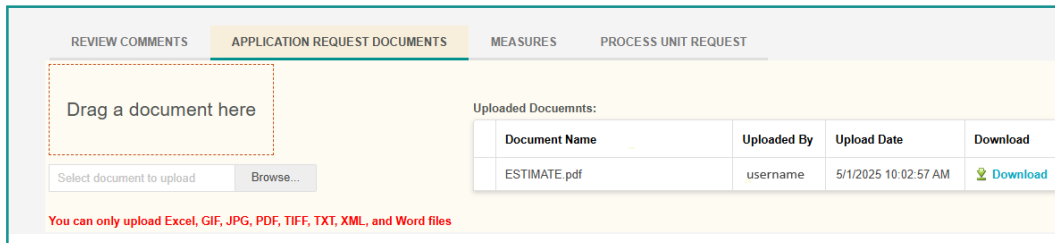
	Client Name	Address	County	City	Rank	Request Status	Program	
Provider: Service Provider								
Edit	Name, Client 2	123 Here Street	BERNALILLO	ALBUQUERQUE	3	MFA Approved	CSLFRF	Delete
	Name, Client	456 There Street	BERNALILLO	ALBUQUERQUE	5	MFA Approved	WRF	

REVIEW COMMENTS APPLICATION REQUEST DOCUMENTS MEASURES PROCESS UNIT REQUEST

[Add Comment](#)

Comment By	Comment Date	Comment
		UPGRADING ELECTRICAL AND REMOVING KNOB AND TUBE

Figure 13 Large Project Requests: Uploading Estimates and Photos



REVIEW COMMENTS **APPLICATION REQUEST DOCUMENTS** MEASURES PROCESS UNIT REQUEST

Drag a document here

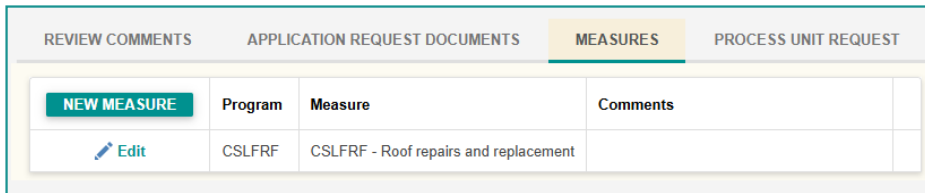
Select document to upload [Browse...](#)

Uploaded Documents:

Document Name	Uploaded By	Upload Date	Download
ESTIMATE.pdf	username	5/1/2025 10:02:57 AM	Download

You can only upload Excel, GIF, JPG, PDF, TIFF, TXT, XML, and Word files

Figure 14 Large Project Requests: Requested Measures

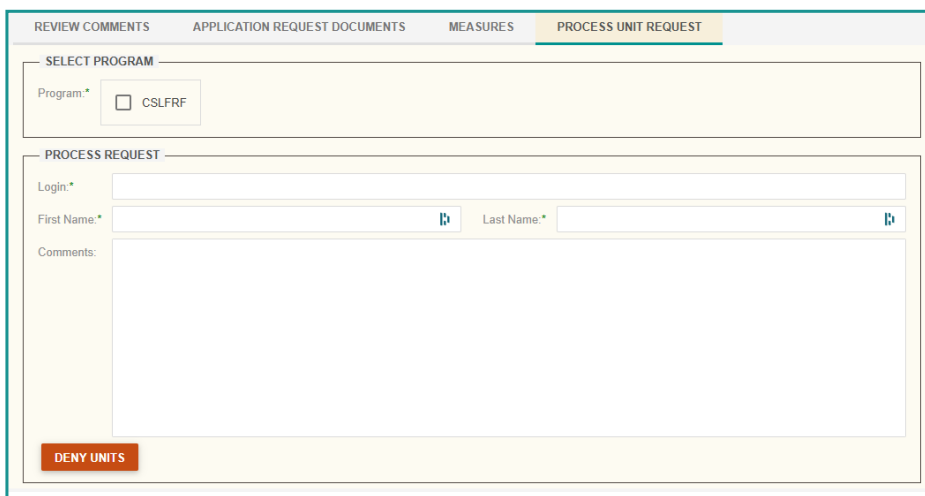


REVIEW COMMENTS APPLICATION REQUEST DOCUMENTS **MEASURES** PROCESS UNIT REQUEST

[NEW MEASURE](#)

	Program	Measure	Comments
Edit	CSLFRF	CSLFRF - Roof repairs and replacement	

Figure 15 Large Project Requests: Process Unit Request for Approval or Denial



REVIEW COMMENTS APPLICATION REQUEST DOCUMENTS MEASURES **PROCESS UNIT REQUEST**

SELECT PROGRAM

Program.* CSLFRF

PROCESS REQUEST

Login.*

First Name.* Last Name.*

Comments:

[DENY UNITS](#)