



# Weatherization Assistance Program: Administrative Professionals Training

Juliana Williams

CAP Management & Leadership Training  
Conference

San Juan, Puerto Rico

January 8, 2020

# Project Goals

Based on Weatherization Assistance Program (WAP) network feedback through 2017 Solutions Summit and ACSI responses, DOE charged NREL with developing online training for Subgrantee Administrative Professionals.

The resulting 29 self-paced online training modules allow learners to:

- Do **more** with **less**
- Learn about and implement **good management** practices
- Improve program **effectiveness** and **compliance**



## Training Development

- NREL and Interstate Renewable Energy Council (IREC) led training development
- Cohort of 12 Subgrantee staff helped develop and review all training content
- IREC questionnaire to network to validate training topics
- April 2019 Continuous Improvement Workshop
- Content development and review with Subgrantee cohort and WAP stakeholders

# Defining Job Tasks

Targeted job roles for new training program:

- **Subgrantee Weatherization Program Director**
- **Subgrantee Fiscal Manager**
- **Subgrantee Quality Assurance Manager**

For each role, we identified:

- **Critical** job tasks
- **Knowledge** areas
- **Compliance** challenges
- Learning **activities**



# About the Trainings

- Short, targeted learning modules, 10-15 mins
- Interactive trainings to practice tasks you would see in your job
- Customized learning pathways to focus on the knowledge and skills your job role requires
- Can repeat modules as often as you like
- Knowledge checks to help you track your progress
- Extensive downloadable resources
- Downloadable completion certificate



**Program  
Director**



**Fiscal  
Manager**



**Quality Assurance  
Manager**

## **Learning Pathway: Budget & Planning**

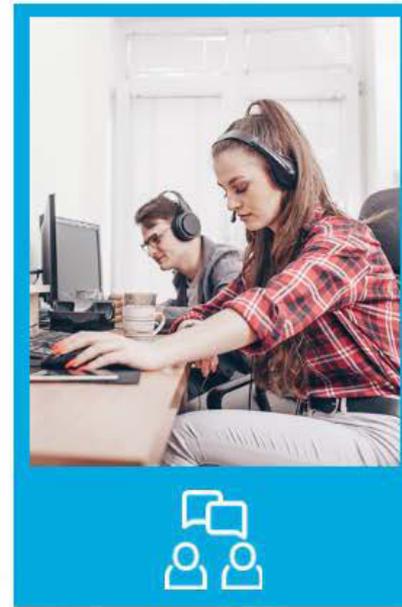
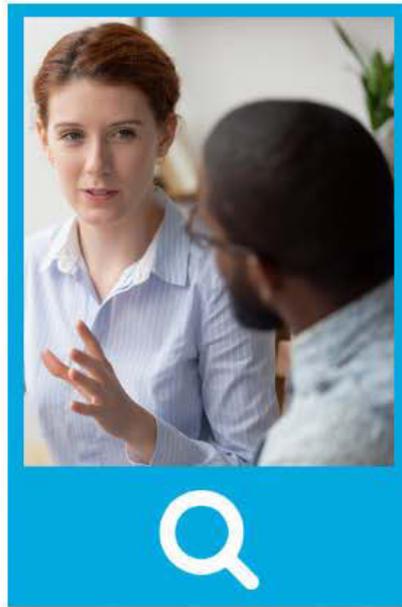
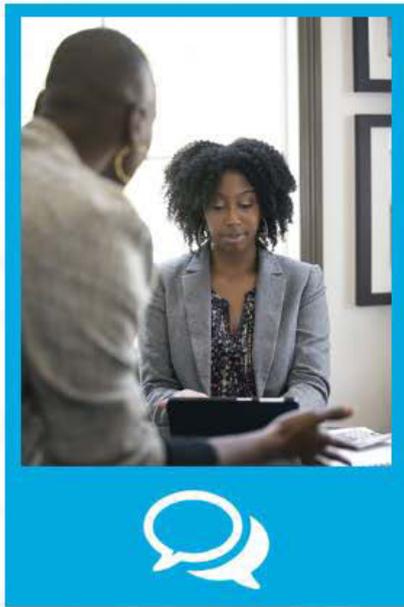
- Welcome to the WAP
- Federal Statutes, Regulations, and Grant Guidance
- Weatherization Budget Basics
- Effective Production Planning
- Managing Multiple Funding Streams
- Implement WAP Budget or Contract Modifications
- Track Production Budgets



Measure	Quantity	Bid A	Bid B	Bid D
Attic Insulation - Blown Cellulose, 2.5 lbs/ cu.ft	1,500			
Wall insulation - Blown Cellulose, 3.5 lbs/ cu.ft	1,200			
Floor insulation - Batt Fiberglass, R-30	1,500			
Total cost (Price includes all materials, labor, permit fees, sales taxes, and LSW practices with insulation.)				

# Learning Pathway: Procurement

- Subcontractor or Employee?
- To Purchase, or Not to Purchase?
- Develop Scoring Criteria for Evaluating Proposals
- Draft and Issue a Solicitation
- And the Winner Is....Select a Subcontractor
- Crossing the Finish Line: Subcontracting



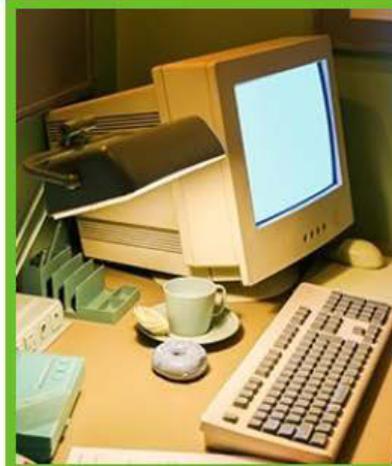
## Learning Pathway: Client Relations

- Meet Your Clients: Client Eligibility
- Coach Your Intake Staff
- It's a Deferral, What Next?
- Managing Client Expectations



# Learning Pathway: The Economics of Weatherization

- The House as a System
- Understanding Savings-to-investment ratio (SIR)



## Learning Pathway: Fiscal Tasks

- Track Production Budgets
- Is Your Work Order in Order?
- Show Me the Money! Reconcile invoices
- Managing Assets and Inventory



Working with field staff to produce work that meets strict technical standards

Hiring new staff

Helping staff manage the emotional impact of serving a vulnerable population

## Learning Pathway: Management

- Basic Employee Management for Weatherization Directors
- Support Quality Work with Training & Technical Assistance Funds
- Develop a Request for Proposals for Training Services\* (available March 2020)
- Coach Your Intake Staff



## Learning Pathway: Quality Improvement

- Managing Subcontractors
- Maintaining Complete Job Files
- Identify Work Quality Issues
- Support Quality Work through Training & Technical Assistance

## Common Multifamily Building Measures

Select each icon to help Jeremy uncover the whole-building and in-unit measures that may apply to this project.



## Learning Pathway: Multifamily

- The Basics of Multifamily Weatherization

# Take a Look!

- Video demonstration of trainings:  
<https://vimeo.com/354781991>

# Pilot

- IREC is recruiting a small cohort of Subgrantee staff (both experienced and new) to provide beta feedback on modules.
- Each pilot participant will be assigned to take courses in two learning pathways and provide course evaluations by February 21, 2020.
- If interested, email Laure-Jeanne Davignon at IREC ([laurejeanne@irecusa.org](mailto:laurejeanne@irecusa.org)) by **January 15, 2020**.

# How to Access

Visit: <https://wap.litmos.com/>

Once you register, follow instructions sent to your email to login

# Thank you!

---

[www.nrel.gov](http://www.nrel.gov)

NREL/PR-6A20-75668

This work was authored by the National Renewable Energy Laboratory, operated by Alliance for Sustainable Energy, LLC, for the U.S. Department of Energy (DOE) under Contract No. DE-AC36-08GO28308. Funding provided by the U.S. Department of Energy Office of Energy Efficiency and Renewable Energy Weatherization and Intergovernmental Programs Office. The views expressed in the article do not necessarily represent the views of the DOE or the U.S. Government. The U.S. Government retains and the publisher, by accepting the article for publication, acknowledges that the U.S. Government retains a nonexclusive, paid-up, irrevocable, worldwide license to publish or reproduce the published form of this work, or allow others to do so, for U.S. Government purposes.

