

Quality Work Plan for Weatherization Director – Arkansas Weatherization Assistance Program

Content: Core Competencies for a <u>Weatherization Director</u>		Name	
Years of Experience in this Capacity	Education Level	Credentials	

Definition *Weatherization Director* is responsible for its agency’s local administration of the Weatherization Assistance Program. This position oversees, plans, coordinates, implements, and manages all aspects of the program. Delivery of service covers a multi-county area, therefore this position must develop/maintain partnerships with local service providers to deliver quality services. Duties include ensuring program quality and compliance with all applicable regulations and policies; preparing grant agreements and budgets; supervising staff; contracting with qualified contractors, submitting reports; and maintaining open communication with the Grantee.

Maturity Model Levels

General: Introduction to the Weatherization Assistance Program

Task	Knowledge (K)	Skills (S)	Abilities (A)	Training Provided			Rating	Recommended Training
				K	S	A		
TASK 1: Understanding the WAP	<ul style="list-style-type: none"> ✓ Department of Energy ✓ Weatherization Assistance Program ✓ Building Science 	<ul style="list-style-type: none"> ✓ Analytical thinking ✓ Attention to details ✓ Reading comprehension ✓ Listening 	<ul style="list-style-type: none"> ✓ Synthesize information ✓ Ask questions ✓ Interpret regulations 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
TASK 2: Understanding the enabling legislation/rules /guidelines	<ul style="list-style-type: none"> ✓ 10 CFR 440 ✓ 10 CFR 600 (2CFR 200) ✓ WPNs ✓ Federal Regulations (OSHA, EPA, etc.) ✓ Local codes & standards ✓ Weatherization Program Notices (WPNs) ✓ OMB Circulars ✓ SWS Deck of Cards ✓ Field Guides ✓ Department of Energy ✓ Weatherization Assistance Program ✓ Building Science 	<ul style="list-style-type: none"> ✓ Reading comprehension ✓ Analytical thinking ✓ Communication ✓ Attention to details 	<ul style="list-style-type: none"> ✓ Synthesize information ✓ Ask questions ✓ Interpret regulations 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	

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<p>TASK 3: Priorities of the WAP</p>	<ul style="list-style-type: none"> ✓ Weatherization Program Notices (WPNs) ✓ OMB Circulars ✓ Annual State Plan 	<ul style="list-style-type: none"> ✓ Leadership ✓ Communication ✓ Motivation ✓ Analytical thinking ✓ Listening ✓ Attention to details 	<ul style="list-style-type: none"> ✓ Set program goals ✓ Establish a WAP Plan of Action ✓ Engage the WAP staff in activities ✓ Explain the purpose of the program ✓ Act as liaison between Non-profit/CAA's WAP office and the Non-profit/ CAA Executive office ✓ Interpret WAP policies to the Non-profit/CAA Executive office 		<p><u>Knowledge</u></p> <p><u>Skills</u></p> <p><u>Abilities</u></p>	
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Domain 1:		Complete Administrative Service Agreement						
Task	Knowledge (K)	Skills (S)	Abilities (A)	Training Provided			Rating	Recommended Training
				K	S	A		
TASK 1: Complete WAP 21	<ul style="list-style-type: none"> ✓ Capped Categories ✓ Cost categories ✓ Program priorities 	<ul style="list-style-type: none"> ✓ Basic math ✓ Cost estimating ✓ Computer ✓ Communication ✓ Attention to details ✓ Organizational ✓ Follow instructions 	<ul style="list-style-type: none"> ✓ Work with CAA/Nonprofit finance department ✓ Establish initial annual budget ✓ Complete WAP 21 form ✓ Interface with state WAP officials ✓ Submit form to AEO/WAP office 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
TASK 2: Complete WAP 22	<ul style="list-style-type: none"> ✓ Client characteristics ✓ Historical number of clients being served 	<ul style="list-style-type: none"> ✓ Organizational ✓ Communication ✓ Computer ✓ Attention to details ✓ Follow instructions 	<ul style="list-style-type: none"> ✓ Interpret historic data ✓ Aggregate data ✓ Make projections ✓ Complete WAP 22 form ✓ Submit form to AEO/WAP office ✓ Interface with state WAP officials 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
TASK 3: Complete SF424	<ul style="list-style-type: none"> ✓ Program requirements ✓ Program priorities ✓ Enabling legislation, rules and guidelines 	<ul style="list-style-type: none"> ✓ Communication ✓ Computer Attention to details ✓ Organizational ✓ Follow instructions 	<ul style="list-style-type: none"> ✓ Complete WAP SF424 form ✓ Submit form to AEO/WAP office ✓ Interface with state WAP officials 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
TASK 4: Complete Administrative Service Agreement	<ul style="list-style-type: none"> ✓ Program requirements ✓ Program priorities ✓ Enabling legislation, rules and guidelines ✓ Program goals and objectives 	<ul style="list-style-type: none"> ✓ Writing ✓ Organizational ✓ Attention to details ✓ Communication ✓ Computer ✓ Follow instructions 	<ul style="list-style-type: none"> ✓ Interface with state WAP officials ✓ Complete WAP forms ✓ Submit agreement to AEO/WAP office ✓ Seek leveraging opportunities 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
TASK 5: Complete a T&TA Plan for all WAP workers	<ul style="list-style-type: none"> ✓ NREL JTAs ✓ Workers job performance ✓ Workers skill sets ✓ Certification requirements for 	<ul style="list-style-type: none"> ✓ Writing ✓ Organizational ✓ Attention to details ✓ Communication ✓ Computer 	<ul style="list-style-type: none"> ✓ Identify training needs ✓ Assess program needs ✓ Relay needs to AEO/WAP office ✓ Complete continuing education request form 				<u>Knowledge</u> <u>Skills</u>	

	<ul style="list-style-type: none"> all weatherization classifications ✓ Continuing education requirements for all weatherization classifications 		<ul style="list-style-type: none"> ✓ Ensure WAP staff maintain certifications ✓ Ensure WAP staff acquire new certifications ✓ Schedule training for WAP employees ✓ Look for ways of improvement for program 		<u>Abilities</u>	
Task 6: Complete Disclosure of Lobbying Activities	<ul style="list-style-type: none"> ✓ DOE stance on Lobbying ✓ 10 CFR 400 ✓ Governing legislation/rules and regulation 	<ul style="list-style-type: none"> ✓ Writing ✓ Organizational ✓ Attention to details ✓ Communication ✓ Computer 	<ul style="list-style-type: none"> ✓ Interface with state WAP officials ✓ Complete WAP forms ✓ Submit to AEO/WAP office 		<u>Knowledge</u>	
Task 7: Complete Contract and Grant Disclosure and Certification Form	<ul style="list-style-type: none"> ✓ 10 CFR 400 ✓ Governing legislation/rules and regulation 	<ul style="list-style-type: none"> ✓ Writing ✓ Organizational ✓ Attention to details ✓ Communication ✓ Computer 	<ul style="list-style-type: none"> ✓ Interface with state WAP officials ✓ Complete WAP forms ✓ Submit to AEO/WAP office 		<u>Knowledge</u>	
					<u>Skills</u>	
					<u>Abilities</u>	

Domain 2: Develop a production schedule								
Task	Knowledge (K)	Skills (S)	Abilities (A)	Training Provided			Rating	Recommended Training
				K	S	A		
TASK 1: Create a monthly production schedule	<ul style="list-style-type: none"> ✓ Program requirements ✓ County goals ✓ Client service goals ✓ Clients served 	<ul style="list-style-type: none"> ✓ Organizational ✓ Communication ✓ Observation ✓ Problem-solving 	<ul style="list-style-type: none"> ✓ Create 12 month production matrix ✓ Create a county production schedule 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
TASK 2: Schedule contractors and/or crew to deliver services	<ul style="list-style-type: none"> ✓ Audit results ✓ Job analysis ✓ Building material ✓ Local codes & standards ✓ Installation measures ✓ SWSs ✓ Testing/Evaluation results ✓ ECOS capabilities 	<ul style="list-style-type: none"> ✓ Communication ✓ Contract negotiations ✓ Computer 	<ul style="list-style-type: none"> ✓ Create rolodex of contractors ✓ Identify which contractor is needed for measure ✓ Contact service providers ✓ Create contract 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
Task 3: Order materials (if applicable)	<ul style="list-style-type: none"> ✓ List of successful material bidders ✓ Audit results ✓ Material list ✓ Local code and standards ✓ Acceptable materials according to DOE ✓ Needed quantities ✓ Competitive prices 	<ul style="list-style-type: none"> ✓ Communication ✓ Computer ✓ Telephone ✓ Basic math 	<ul style="list-style-type: none"> ✓ Review work order ✓ Review Material list ✓ Decide on materials that must be ordered ✓ Confirm acceptable materials to be purchased ✓ Ensure Inventory protocols are used ✓ Utilize successful material bidders ✓ Conduct "bid" request for materials that were not assigned to a contractor 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
TASK 4: Monitor county production	<ul style="list-style-type: none"> ✓ Know the efficacy of the program ✓ County goals ✓ Service client goals ✓ In-progress production ✓ Completed units by county 	<ul style="list-style-type: none"> ✓ Time management ✓ Problem-solving 	<ul style="list-style-type: none"> ✓ Review client files ✓ Review county production numbers are being met by county 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	

<p>Task 5: Confirm DOE and LIHEAP allocations (also leveraged funds, if applicable)</p>	<ul style="list-style-type: none"> ✓ Approved DOE and LIHEAP budgets ✓ Expected or approved leveraged resources ✓ State plan 	<ul style="list-style-type: none"> ✓ Analytical thinking ✓ Attention to details ✓ Reading comprehension 	<ul style="list-style-type: none"> ✓ Collect service agreements from funding sources ✓ Execute agreements ✓ Maintain current version of funding levels in agency file 		<p><u>Knowledge</u></p> <p><u>Skills</u></p> <p><u>Abilities</u></p>	
<p>TASK 6: Monitor expenditures</p>	<ul style="list-style-type: none"> ✓ Allowable activities under funding sources ✓ Maximum allowable caps on funding sources 	<ul style="list-style-type: none"> ✓ Aggregate spending ✓ Time management 	<ul style="list-style-type: none"> ✓ Guard against cost overruns ✓ Report need to reallocate funds to AEO/WAP office ✓ Submit revised WAP 21 form ✓ Submit signed amendment to AEO/WAP ✓ Aggregate spending ✓ Conduct monthly fiscal reviews ✓ Confirm spending with CAA/Non-profit's finance department 		<p><u>Knowledge</u></p> <p><u>Skills</u></p> <p><u>Abilities</u></p>	

Domain 3: Create a quality workforce								
Task	Knowledge (K)	Skills (S)	Abilities (A)	Training Provided			Rating	Recommended Training
				K	S	A		
TASK 1: Evaluate client satisfaction	<ul style="list-style-type: none"> ✓ Installed measures ✓ Allowable measures ✓ Energy audit results ✓ Work order ✓ Job analysis ✓ Reworks or call backs ✓ Quality Control Inspectors competency ✓ Client response 	<ul style="list-style-type: none"> ✓ Analytical thinking Communication ✓ Mediation ✓ Listening ✓ Evaluation ✓ Presenting information ✓ Making decisions ✓ Problem-solving 	<ul style="list-style-type: none"> ✓ Conduct client interview ✓ Assess workmanship ✓ Review economics of the repairs to determine whether to repair or to defer. ✓ Review client file ✓ Review pre and post photographs ✓ Review testing results ✓ Review work order ✓ Create Client Response Matrix ✓ Contact any clients with complaints 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
Task 2: Accompany Energy Auditor and Quality Control Inspector in the field.	<ul style="list-style-type: none"> ✓ Equipment/forms needed to conduct an audit ✓ Equipment/forms needed to conduct a final inspection ✓ SWS Deck of Cards ✓ ECOS ✓ Blower Door ✓ FLIR ✓ Manometer ✓ WattsUp meter ✓ Gas sniffer ✓ Monoxor 	<ul style="list-style-type: none"> ✓ Measuring ✓ Attention to details ✓ Basic math 	<ul style="list-style-type: none"> ✓ Observe and analyze employee modeling a building ✓ Observe and analyze correct use of a blower door ✓ Observe and analyze use of FLIR ✓ Observe and analyze use of gas sniffer ✓ Observe and analyze employee conducting CAZ testing ✓ Observe and analyze employee conducting a pressure pan test (if applicable) ✓ Observe and analyze employee record testing results on WAP forms 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
TASK 3: Conduct performance evaluations of WAP staff	<ul style="list-style-type: none"> ✓ Worker's job performance ✓ Worker's skill sets ✓ Certification requirements for all weatherization classifications ✓ Continuing education 	<ul style="list-style-type: none"> ✓ Leadership skills ✓ Communication ✓ Listening ✓ Observation ✓ Tactfulness 	<ul style="list-style-type: none"> ✓ Conduct program specific interviews (worker performance, process, scheduling, value, opportunities for improvement) ✓ Observe worker behavior ✓ Observe worker skills 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	

	requirements for all weatherization classifications					
TASK 4: Identify needed training for each WAP staff	<ul style="list-style-type: none"> ✓ Basic building science ✓ Certification requirements for all weatherization classifications ✓ Continuing education requirements for all weatherization classifications ✓ Local codes & standards ✓ SWSs 	<ul style="list-style-type: none"> ✓ Making decisions ✓ Being accurate ✓ Analytical thinking ✓ Attention to details 	<ul style="list-style-type: none"> ✓ Create Training & Technical Assistance Plan 		<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
TASK 5: Recommend & attend Tier 1 & 2 training for WAP staff	<ul style="list-style-type: none"> ✓ Basic building science ✓ Program requirements ✓ Credentialing requirements of workers ✓ Professional behavior and code on conduct ✓ Program and agency guidelines ✓ Required documentation 	<ul style="list-style-type: none"> ✓ Attention to details ✓ Problem-solving 	<ul style="list-style-type: none"> ✓ Perform analysis on training needs ✓ Create training matrix for entire WAP staff ✓ Submit training needs to AEO/WAP office ✓ Schedule outside training 		<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	

Domain 4: Procure Materials								
Task	Knowledge (K)	Skills (S)	Abilities (A)	Training Provided			Rating	Recommended Training
				K	S	A		
Task 1: Advertise for materials	<ul style="list-style-type: none"> ✓ DOE Appendix A ✓ State and local paper ✓ Pricing for ad(s) ✓ Coding category for advertising ✓ Length of required posting of ad ✓ Ad submittal process 	<ul style="list-style-type: none"> ✓ Writing ✓ Computer ✓ Communication 	<ul style="list-style-type: none"> ✓ Write information for procurement ad ✓ Submit to paper ✓ Submit copy of newspaper ad to AEO/WAP office 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
Task 2: Conduct Bidder's Conferences	<ul style="list-style-type: none"> ✓ DOE Appendix A ✓ DOE Procurement toolkit/forms ✓ State of Arkansas procurement rules ✓ Agency procurement policies ✓ Bidder's forms ✓ Needed services 	<ul style="list-style-type: none"> ✓ Speaking ✓ Communication ✓ Recordkeeping 	<ul style="list-style-type: none"> ✓ Ability to host conference ✓ Ensure record retention 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
Task 3: Select Material Supplier	<ul style="list-style-type: none"> ✓ DOE Appendix A ✓ DOE Procurement toolkit ✓ Procurement requirements for selection ✓ State of Arkansas procurement rules ✓ Agency procurement policies 	<ul style="list-style-type: none"> ✓ Remaining impartial ✓ Communication ✓ Analyzing 	<ul style="list-style-type: none"> ✓ Aggregate service providers ✓ Analyze results ✓ Conduct comparison of services ✓ Negotiate pricing ✓ Select supplier 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	

Domain 5: Secure and maintain quality contractors								
Task	Knowledge (K)	Skills (S)	Abilities (A)	Training Provided			Rating	Recommended Training
				K	S	A		
Task 1: Determine needed contractors	<ul style="list-style-type: none"> ✓ Service needs ✓ Credentialing requirements ✓ Professional behavior and code on conduct on contractors ✓ State of Arkansas procurement rules ✓ Agency procurement policies ✓ Your personal capabilities 	<ul style="list-style-type: none"> ✓ Attention to details ✓ Communication ✓ Listening ✓ Observation ✓ Tactfulness 	<ul style="list-style-type: none"> ✓ Determine gaps in service providers ✓ Review pass/fail reports on previous providers ✓ Determine need to rebid services 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
Task 2: Advertise for services	<ul style="list-style-type: none"> ✓ State and local paper ✓ Pricing for ad(s) ✓ Coding category for advertising ✓ Length of required posting of ad ✓ Ad submittal process ✓ State of Arkansas procurement rules ✓ Agency procurement policies 	<ul style="list-style-type: none"> ✓ Writing ✓ Computer ✓ Communication 	<ul style="list-style-type: none"> ✓ Write information for procurement ad ✓ Submit to paper ✓ Submit copy of newspaper ad to AEO/WAP office 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
Task 3: Conduct Bidder's Conferences	<ul style="list-style-type: none"> ✓ DOE Procurement toolkit/forms ✓ State of Arkansas procurement rules ✓ Agency procurement policies ✓ Bidder's forms ✓ Needed services 	<ul style="list-style-type: none"> ✓ Speaking ✓ Communication ✓ Recordkeeping 	<ul style="list-style-type: none"> ✓ Ability to host conference ✓ Ensure record retention 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	

Task 4: Select Contractors	<ul style="list-style-type: none"> ✓ DOE Procurement toolkit ✓ Procurement requirements for selection ✓ State of Arkansas procurement rules ✓ Agency procurement policies 	<ul style="list-style-type: none"> ✓ Remaining impartial ✓ Communication ✓ Analyzing 	<ul style="list-style-type: none"> ✓ Aggregate service providers ✓ Analyze results ✓ Conduct comparison of services ✓ Negotiate pricing ✓ Select contractor 		<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>
Task 5: Create contractor contracts with SWS compliance	<ul style="list-style-type: none"> ✓ SWS compliance ✓ Local codes ✓ Contract-writing ✓ Necessary DOE WAP language for contracts ✓ State of Arkansas procurement rules ✓ Agency procurement policies ✓ 	<ul style="list-style-type: none"> ✓ Writing ✓ Computer ✓ Communication 	<ul style="list-style-type: none"> ✓ Execute contract 		<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>
TASK 6: Create a Pass/Fail report on each contractor by service	<ul style="list-style-type: none"> ✓ ECOS Reports Tab ✓ Final Inspection results by contractor ✓ Reworks by contractor 	<ul style="list-style-type: none"> ✓ Computer ✓ Excel software 	<ul style="list-style-type: none"> ✓ Generate a report from ECOS ✓ Aggregate data 		<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>
TASK 7: Identify needed training for each contractor	<ul style="list-style-type: none"> ✓ Findings by contractor ✓ Missed opportunities vs. poor workmanship ✓ Retention agreements 	<ul style="list-style-type: none"> ✓ Analytical ✓ Communication ✓ Negotiation 	<ul style="list-style-type: none"> ✓ Create a Tier 2 training plan ✓ Schedule training ✓ Create retention agreements 		<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>
TASK 8: Recommend Tier 1 & 2 training for contractors	<ul style="list-style-type: none"> ✓ Basic building science ✓ Program requirements ✓ Credentialing requirements of workers 	<ul style="list-style-type: none"> ✓ Attention to details ✓ Problem-solving 	<ul style="list-style-type: none"> ✓ Perform analysis on training needs ✓ Create training matrix for entire WAP staff ✓ Submit training needs to AEO/WAP office ✓ Schedule outside training 		<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>

	<ul style="list-style-type: none">✓ Professional behavior and code on conduct✓ Program and agency guidelines✓ Required documentation					
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Domain 6: Program Reporting & Forms								
Task	Knowledge (K)	Skills (S)	Abilities (A)	Training Provided			Rating	Recommended Training
				K	S	A		
Task 1: Submit Reports to Grantee (as required)	<ul style="list-style-type: none"> ✓ AEO WAP requirements ✓ DOL requirements (if applicable) 	<ul style="list-style-type: none"> ✓ Organization ✓ Report writing ✓ Attention to details 	<ul style="list-style-type: none"> ✓ Maintain documentation for program monitoring (federal, utility, etc.) ✓ Maintain Inventory Reports ✓ Maintain program/clients files for designated time frame (5 years) 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
Task 2: Close out the project	<ul style="list-style-type: none"> ✓ Agency/company processes ✓ Program requirements ✓ Required paperwork ✓ Required signatures ✓ Year End Billing 	<ul style="list-style-type: none"> ✓ Organization ✓ Report writing 	<ul style="list-style-type: none"> ✓ Prepare completion reports ✓ Submit necessary close out documents to AEO ✓ Submit final billing ✓ Submit final production report ✓ Pay out all expenses 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	
Task 3: Maintain files and records on Contractors	<ul style="list-style-type: none"> ✓ Legal responsibilities ✓ Program requirements ✓ Recordkeeping best practices ✓ ECOS <i>Reports</i> tab 	<ul style="list-style-type: none"> ✓ Attention to details ✓ Organization 	<ul style="list-style-type: none"> ✓ Create and Maintain Contractor Findings Report ✓ Create and Maintain Workmanship Complaints by Contractor ✓ Maintain oversight on contractor compliances (good standing, licensure, certification renewals, etc.) 				<u>Knowledge</u> <u>Skills</u> <u>Abilities</u>	

