

U.S. DEPARTMENT OF
ENERGY

Office of
**ENERGY EFFICIENCY &
RENEWABLE ENERGY**

Weatherization Assistance Program Website & Program Managers Toolkit

Susan Gardner Zartman

February 2020



EERE | Weatherization Website

Weatherization Assistance Program website is housed on the [EERE website](#):

Services > States and Local Communities > EERE Programs & Initiatives

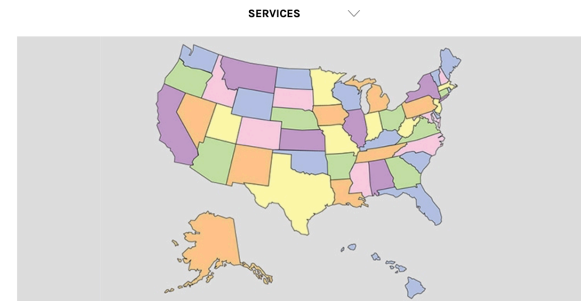


Photo courtesy of ©iStockphoto.com/compurow

STATE-SPECIFIC RENEWABLE ENERGY TOOLS AND RESOURCES

[Alternative Fuels Data Center](#) provides information about alternative fuels and advanced vehicles, including laws and incentives, fueling stations, fuel prices, and more by state.

The [Energy Saver](#) tax credits, rebates, and savings tool provides a listing of incentives offered by government agencies, utilities, and others by state.

[Energy Star](#) helps state and local governments with energy saving strategies to help meet their energy and financial performance goals.

[State and Local Energy Data](#) provides comprehensive energy use and activity data for cities across the U.S.

[U.S. Energy Information Administration \(EIA\)](#) provides the most current state energy information, including overviews, rankings, data, analyses, and state-by-state comparisons.

[The State and Alternative Fuel Provider Fleet Program](#) requires covered fleets to meet their Energy Policy Act (EPA) requirements and reduce their petroleum consumption through Standard Compliance or Alternative Compliance.

EERE PROGRAMS AND INITIATIVES

[Better Buildings Neighborhood Program](#) works with communities to promote energy efficiency upgrades in homes and other buildings.

[Building America](#) conducts energy-efficient home research projects in the states.

[Clean Cities](#) supports coalitions in the states dedicated to reducing petroleum use in transportation.

[Geothermal Technologies Office](#) funds geothermal projects in the states.

[Green Power Network](#) provides information on green power options in the states.

[Integrated Deployment State and Territory Projects](#) apply clean energy solutions to reduce fuel use in some states.

[Advanced Manufacturing Office](#) works in the states to help industry use energy more efficiently.

[The State and Local Energy Efficiency Action Network](#) is a state and local effort to take energy efficiency to scale and achieve all cost-effective energy efficiency by 2020.

[Weatherization & Intergovernmental Programs Office](#) provides funding and technical assistance to state and local governments to facilitate the adoption of renewable energy and energy efficiency technologies.

Weatherization Website

ENERGY.GOVEnergy.gov OfficesNational LabsSearch Energy.gov

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WEATHERIZATION AND INTERGOVERNMENTAL PROGRAMS OFFICE ▾

Explore the WIP Project Map



State Energy Program

Weatherization Assistance Program

State and Local Solution Center

Saving Energy and Money for American Homes, Communities, Businesses, and Industries

The Weatherization and Intergovernmental Programs Office (WIP) is part of the DOE Office of Energy Efficiency and Renewable Energy (EERE) and supports DOE's mission to create greater energy affordability, security, and resiliency.

WIP's mission is to enable strategic investments in energy efficiency and renewable energy technologies through the use of innovative practices across the United States in partnership with a wide range of stakeholders, including state and local organizations and community-based non-profits.

WIP is made up of two programs focused on state and local governments—the Weatherization Assistance Program (WAP) and the State Energy Program (SEP)—and a team that develops and delivers targeted technical assistance and strategic initiatives to state and local governments.


[Learn more.](#)

Weatherization Website

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+About the Weatherization & Intergovernmental Programs Office

Weatherization Assistance Program

+About the Weatherization Assistance Program

Where to Apply for Weatherization Assistance

Program Guidance

+Technical and Management Resources

+Guidelines for Home Energy Professionals

+State Energy Program

State & Local Solution Center

Explore the WIP Project Map

State Energy Program

Weatherization Assistance Program


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Weatherization Website | Training Resources

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WEATHERIZATION AND INTERGOVERNMENTAL PROGRAMS OFFICEWEATHERIZATION ASSISTANCE PROGRAM

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—Weatherization Assistance Program

+About the Weatherization Assistance Program

Where to Apply for Weatherization Assistance

Program Guidance

—Technical and Management Resources

—Training Resources

Grantee Managers Toolkit

Energy Audits

Monitoring

Weatherization Website | Updates & Resources

WEATHERIZATION AND INTERGOVERNMENTAL PROGRAMS OFFICE



Program Updates & Training Resources

[Home](#) » [Weatherization Assistance Program](#) » [Technical and Management Resources](#) » Program Updates & Training Resources

Based on feedback received via a Weatherization Assistance Program (WAP) Grantee survey, WAP is holding Weatherization trainings for Grantees to review new program initiatives, review important program procedures, and new tools. Access videos of the training and download files.

If you have additional questions after viewing one of these trainings, please contact your DOE Project Officer, or email WAP Technical Assistance at wapta@hq.doe.gov.

➤ **Energy Audit Tools**

➤ **Health & Safety**

➤ **Field Guides/Variance
Requests/Standards Approval**

➤ **Monitoring**

➤ **Guidelines for Home Energy
Professionals**

➤ **WAP Management**

Weatherization Website | Training Resources

Monitoring Training Resources

[Home](#) » [Monitoring Training Resources](#)

Access training videos and download files on monitoring. To view other trainings, visit the [Program Updates and Training Resources web page](#).



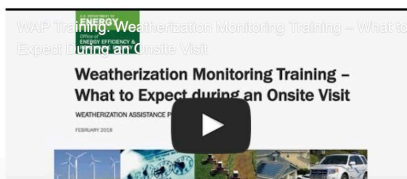
WEATHERIZATION MONITORING TRAINING

Provides a comprehensive overview on monitoring.



PLANNING YOUR ONSITE VISIT

This second training provides how Grantees can prepare for onsite monitoring visit.



WHAT TO EXPECT DURING AN ONSITE VISIT

This third training module provides what to expect during an onsite monitoring visit.

Videos – You Tube

Grantee Manager's Training Toolkit

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WEATHERIZATION AND INTERGOVERNMENTAL PROGRAMS OFFICE

Weatherization Assistance Program Grantee Manager Training Toolkit

[Home](#) » [Weatherization Assistance Program](#) » [Technical and Management Resources](#) » [Training Resources](#) » Weatherization Assistance Program Grantee Manager Training Toolkit

The U.S. Department of Energy's (DOE) Weatherization Assistance Program (WAP) collected WAP materials and resources and categorized them by topic to address the need to improve the organization of WAP Programmatic resources, including, but are not limited to, marketing videos – internal/external, training videos – internal/external, webinars, templates, presentations, fact sheets, and frequently asked questions.

Weatherization 101
July 2016
Weatherization Works!
U.S. DEPARTMENT OF ENERGY


The Weatherization Assistance Program: 40 Years of Improving Homes and Lives
Assistance Program
40 Years of Improving Homes and Lives

How Weatherization Works	+
Legislation, Regulations, & Grant Guidance	+
Programmatic & Management	+
Performance and Accountability for Grants in Energy (PAGE)	+

Grantee Manager's Toolkit

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WEATHERIZATION ASSISTANCE PROGRAM

+

About the Office

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Weatherization Assistance Program

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About the Weatherization Assistance Program

Where to Apply for Weatherization Assistance

Program Guidance

—

Technical and Management Resources

—

Training Resources

Grantee Managers Toolkit

Energy Audits

Monitoring

Weatherization Assistance Program > Technical and Management Resources > Training Resources

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OFFICE OF ENERGY EFFICIENCY & RENEWABLE ENERGY

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Toolbox Structure



How Weatherization Works



Legislation, Regulations, & Grant Guidance



Programmatic & Management



Performance and Accountability for Grants in Energy (PAGE)



Historic Preservation



Financial Management



Recordkeeping



Monitoring Plan - Monitor Smarter, Not Harder



Quality Control & Standard Work Specifications



Energy Audits



Legislation, Regulations, & Grant Guidance



Programmatic & Management



ANNUAL PLANNING

- [Grantee Planning Calendar Training](#)

Supporting Resources

- [Weatherization Program Year 2019 Application Instructions](#)
- [PAGE Website](#)
- [Training & Technical Assistance Planning & Reporting Template](#)
- [Monitoring Planning & Reporting Template](#)
- [Health & Safety Plan Template](#)

WAP GRANT APPLICATION

- [Grant Application Submittal Process \(Coming soon\)](#)
- [WPN XX-1 Guidance Training \(Coming soon\)](#)
- [Performance and Accountability for Grants in Energy in Energy \(PAGE\) Trainings](#)
 - These trainings are available within the PAGE online system under the Training Videos section > Weatherization Assistance Program (WAP). To view these trainings, you must have a PAGE user account. To obtain a PAGE account, please contact the PAGE help desk (PAGE-Hotline@ee.doe.gov or 866-492-4546).
 - [Create WAP Application Package](#)
 - [Create a Revision of an Application Package](#)
 - [Create SF-424](#)
 - [Annual File](#)
 - [Budget](#)
 - [How to Verify and Submit the application package](#)

Supporting Resources

- [Weatherization PAGE Enhancement Training Webinar](#)
- [Weatherization Program Notice 19-1 Program year 2019 Weatherization Grant Guidance](#)
- [Weatherization Program Notice 19-2 Program Year 2019 Grantee Allocations](#)
- [Weatherization Program Notice 19-3 Poverty Income Guidelines and Definition of Income](#)

TRAINING & TECHNICAL ASSISTANCE (T&TA) PLANNING AND REPORTING

- [Training & Technical Assistance Planning and Reporting Template Training](#)
 - [Sample Template \(Coming soon\)](#)

Toolbox Structure

ANNUAL PLANNING

- [Grantee Planning Calendar Training](#) (video – You Tube)

Topic Header

Training Videos

Supporting Resources

- [Weatherization Program Year 2019 Application Instructions](#) (PDF)
- [PAGE Website](#)
- [Training & Technical Assistance Planning & Reporting Template](#) (video - You Tube)
- [Monitoring Planning & Reporting Template](#) (video - You Tube)
- [Health & Safety Plan Template](#) (video - You Tube)

Supporting Resources

WAP GRANT APPLICATION

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Supporting Resources

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- [Weatherization Program Notice 19-3 Poverty Income Guidelines and Definition of Income](#)

Toolkit | How Weatherization Works

How Weatherization Works

WAP OVERVIEW

- [Weatherization Works!](#) (video - YouTube)
- [This is the World of Weatherization](#) (video - WXTV)
- [About the Weatherization Assistance Program](#) (URL)
- [WAP historical timeline](#) (URL)

Supporting Resources

- [WAP Briefing Book](#) (PDF)
- [Weatherization Memorandum 008: Quality Management Plan Draft KSAs](#) (PDF)
 - Attachments
 - [WAP Program Manager](#) (PDF)
 - [WAP Technical Manager](#) (PDF)
 - [Non-WAP Specific Functions](#) (PDF)
- [Weatherization Program Process Chart](#) (PDF)

Toolkit | Legislation, Regs & Grant Guidance

Legislation, Regulations, & Grant Guidance

ENABLING LEGISLATION AND REGULATIONS

- Federal Statutes, Regulations and Grant Guidance PowerPoint (Coming soon)

Supporting Resources

- [Weatherization Rules and Regulations Resources](#) (URL)
 - [Code of Federal Regulations 10 CFR 440](#) (URL)
 - [Weatherization Assistance Program Enabling Legislation](#) (URL)
 - [Appendix A: Standards for Weatherization Materials](#) (URL)

GRANT GUIDANCE - WEATHERIZATION PROGRAM NOTICES AND MEMORANDUMS

- Guide to Weatherization Program Notices and Memorandums (Coming soon)
- [Weatherization Program Guidance and Memorandums](#) (URL)
 - [WPN 20-1: Program Year 2020 Weatherization Grant Application](#) (PDF)
 - [WAP Memorandum 001: Process Implementation](#) (PDF)
 - [WAP Memorandum 041: Weatherization Assistance Program GovDelivery Distribution List](#) (PDF)

Performance and Accountability for Grants in Energy (PAGE)

REPORTING

- [Performance and Accountability for Grants in Energy in Energy](#) (PAGE) Trainings
 - These trainings are available within the PAGE online system under the Training Videos section > Weatherization Assistance Program (WAP). To view these trainings, you must have a PAGE user account. To obtain a PAGE account, please contact the PAGE help desk (PAGE-Hotline@ee.doe.gov or 866-492-4546).
 - Create and Submit a Federal Financial Report
 - Reject a Federal Financial Report
 - Approve a Federal Financial Report
 - Historic Preservation Report Submission

Toolkit | Financial Management

Financial Management

WAP FINANCIAL TOOLKIT

- [Financial Management Training \(PowerPoint\)](#)
- [Financial Management Training Manuals - One Day Curriculum - Trainer's Manual \(PDF\)](#)
- [Financial Management Training Manuals - One Day Curriculum - Participant's Manual \(PDF\)](#)
- [Financial Management Training Manuals - Three Hour Curriculum - Trainer's Manual \(PDF\)](#)
- [Financial Management Training Manuals - Three Hour Curriculum - Participant's Manual \(PDF\)](#)
- [Procurement Management Training \(PowerPoint\)](#)
- [Procurement Training Manuals - One Day Curriculum - Trainer's Manual \(PDF\)](#)
- [Procurement Training Manuals - One Day Curriculum - Participant's Manual \(PDF\)](#)
- [Procurement Training Manuals - Three Hour Curriculum - Trainer's Manual \(PDF\)](#)
- [Procurement Training Manuals - Three Hour Curriculum - Participant's Manual \(PDF\)](#)

Supporting Resources

- [Sample Financial Policies and Procedures \(Word\)](#)
- [Agency "Self-Assessment" Tool \(PDF\)](#)
- [Financial Management Participant Jeopardy Activities \(PowerPoint\)](#)
- [Fiscal Accounting of Weatherized Units](#)
 - [WAP Memorandum 035: Weatherization Leveraging \(PDF\)](#)
 - [WPN Notice 17-5: Closeout Procedures for Grants Under the Weatherization Assistance Program \(PDF\)](#)
 - [WPN 10-10: Reprogramming Training and Technical Assistance Funds to Program Operations \(PDF\)](#)
- [Procurement and Contracts](#)
 - [WPN Notice 17-6: Property Acquired Under the Weatherization Assistance Program Including Vehicle and Equipment Purchases \(PDF\)](#)

Toolkit | Recordkeeping

Recordkeeping

CLIENT FILES

- [Client Relations Training](#) (PowerPoint)

Supporting Resources

- [WAP Memorandum 010: Quality Management Plan - Record Keeping and Reporting](#) (PDF)
- [WPN 10-8: Weatherization Guidance on Maintaining the Privacy of Recipients of Services](#) (PDF)

ELIGIBILITY

- [Eligibility Determination](#) (URL)
- [WAP Memorandum 002: Reminder of Client Priority - High Energy Burden](#) (PDF)
- [Weatherization Program Notice 17-4: Multifamily Housing - Procedure for Certifying Income-Eligible HUD Assisted Buildings](#) (PDF)
- [WPN 16-6: Weatherization of Rental Units](#) (PDF)
- [WPN 16-5: Multifamily Weatherization](#) (PDF)

DEFERRALS/REFERRALS

- [Examples of Weatherization Deferrals](#) (Coming soon)
- [Code of Federal Regulations 10 CFR 440](#) (URL)
- [Weatherization Policy Manual](#) (Coming soon)
- [Program Manual](#) (Coming soon)
- [Program Policies and Procedures](#) (Coming soon)

MONITORING

- Weatherization Monitoring Training
 - [Monitoring Overview](#) (video - YouTube)
 - [Preparing for an Onsite Visit](#) (video - YouTube)
 - [What to Expect During an Onsite Visit](#) (video - YouTube)
- [Corrective Action Plan Training for Grantees](#) (video - YouTube)
- [Weatherization Monitoring Planning & Reporting Template Training](#) (video - YouTube)

Supporting Resources

- [WPN 20-4: Weatherization Assistance Program Monitoring Guidance](#) (PDF)
- [WPN 15-4: Quality Work Plan Requirement Update](#) (PDF)
- Weatherization Risk Assessment Tool (Coming soon)

Toolkit | Quality Control & SWS

Quality Control & Standard Work Specifications

FIELD GUIDE AND VARIANCE REQUESTS

- Introduction to Quality Control and Quality Assurance (*Coming soon*)
- [Field Guide Review Process](#) (video - YouTube)
- [Variance Request Review Process](#) (video - YouTube)

Supporting Resources

- [WAP Memorandum 039: Update to Field Guide Expiration Reminder for WAP Grantees – New Variance Request Samples](#) (PDF)

STANDARD WORK SPECIFICATIONS (SWS)

- [Guidelines for Home Energy Professionals Standard Work Specifications](#) (URL)

Supporting Resources

- [WAP Memorandum 048: Updated Maintenance Process to the Standard Work Specifications](#) (PDF)
- [WPN 15-4: Quality Work Plan Requirement Update](#) (PDF)
- [Standard Work Specifications \(SWS\) Tool](#) (URL)

JOB TASK ANALYSIS (JTA)

- [Guidelines for Home Energy Professionals Accredited Training](#) (URL)

Supporting Resources

- [WPN 15-4: Quality Work Plan Requirement Update](#) (PDF)
- [WAP Memorandum 050: Crew Lead and Retrofit Installer/Technician Job Task Analysis and Certification Updates, and Badges Toolkit](#) (PDF)
- [WAP Memorandum 036: Energy Auditor and Quality Control Inspector Certification Scheme Updates](#) (PDF)

REALIZED ENERGY SAVINGS - BRINGING AUDITS INTO THE REAL WORLD

- [WPN 19-4 Revised Energy Audit Approval Procedures, Related Audit, and Material Approvals \(PDF\)](#)

Supporting Resources

- Sample utility agreements (*Coming soon*)
- Sample tracking framework with savings tied to specific measures (*Coming soon*)
- Agency and contractor staff (IN, MA) (*Coming soon*)

RENEWABLE ENERGY MEASURES

- [Solar Template for Incorporating Solar Photovoltaics \(PV\) into WAP \(URL - Word\)](#)

Supporting Resources

- [WAP Memorandum 024: The Use of Solar PV in the WAP \(PDF\)](#)

Feedback

Things to Do Next Week

- Sharing scheduling with network so everyone is on the same page
- New Staff Training – Program Manager
- Find the website and review – miss WAPTAC
- Cross Training within your organization

Missing Topics

- **Allocation Formula – more information & details – add to toolkit and links to NASCSP**