

Weatherization Assistance Program Update

Erica Burrin, Acting Program Manager

August 2018



Funding Outlook

- **2017**
 - \$223 Million Formula Distribution
 - \$3 Million HQ T&TA
 - 17% of T&TA to Grantees
- **2018**
 - \$247.5 Million
 - \$500,000 for Vermiculite Study
 - \$3 Million HQ T&TA
- **2019**
 - The President's Budget continues to focus on early stage research & development on energy technologies

Program Year 2019 Planning

- DOE's goal is to ensure Grantees have sufficient time to prepare PY19 State Plans.
 - Grantees... *“shall submit an application... not later than 60 days after the date of notice...”* 10 CFR 440.12 (a)
- Determine Grant funding levels when only partial funding is available.
- DOE plans to issue WPN 19-1, ALRD and PY19 Application Package in **December 2018**.

Once the FY19 Budget is Approved....

- DOE will issue WPN 19-2, Program Year 2019 Grantee Allocations.
- DOE will adjust Grantee allocations based on the final FY19 appropriations.
- Grantees will begin their budget modification process.

WAP Leadership

- In the interim, Erica Burrin is Acting Program Manager.
- Plans for FY 19 is to select a permanent WAP Manager.
- No interruption in receipt of grant funds or WAP management and services.

Weatherization Program Guidance

ENERGY.GOV Energy.gov Offices National Labs Search Energy.gov

Office of ENERGY EFFICIENCY & RENEWABLE ENERGY About Us Initiatives SERVICES EFFICIENCY RENEWABLES TRANSPORTATION

Weatherization Program Guidance

Home » Weatherization Assistance Program » Weatherization Program Guidance

The U.S. Department of Energy's (DOE) Weatherization Assistance Program (WAP) is governed by various federal regulations designed to help manage and account for the resources provided by DOE. Each year, Congress passes a Weatherization Assistance Program Appropriation. Find active and archived weatherization program notices and memorandums in the table below, which establish the framework for administering WAP funds. To receive the latest program notices and memorandums, please [sign up](#) for our newsletter.

Search:

WEATHERIZATION PROGRAM GUIDANCE

Showing 1 to 10 of 213 entries

| DESCRIPTION | EFFECTIVE DATE | TOPIC | TYPE |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--------------|--------------------|
| WAP Memorandum 040: Allowable Use of Training Funds for the National Community Action Partnership's 2018 Annual Convention The 2018 National Community Action Partnership's (NCAP) 2018 Annual Convention is being held Aug. 28-31, 2018, at the Sheraton Denver Downtown in Denver, Colorado. | 7/11/2018 | Unclassified | Active Memorandums |
| WAP Memorandum 039: Update to Field Guide Expiration Reminder for WAP Grantees – New Variance Request Samples The U.S. Department of Energy (DOE) outlined requirements to support and verify quality work in the Weatherization Assistance Program (WAP) beginning in Program Year (PY) 2014. Weatherization Program Notice (WPN) 14-4, which was superseded by WPN 15-4, defined what constitutes a quality installation of weatherization measures, outlined how those measures are inspected and validated, and defined acceptable training and credentialing of workers. | 6/26/2018 | Unclassified | Active Memorandums |
| WAP Memorandum 038: Solution Summits Results As part of our commitment to continuous improvement of the Weatherization Assistance Program (WAP), the U.S. Department of Energy (DOE) authorized the National Renewable Energy Laboratory (NREL) to host a series of collaborative meetings, called Solution Summits. | 6/14/2018 | Unclassified | Active Memorandums |
| WAP Memorandum 037: Allowable Use of Training Funds for 2018 NASCSP Annual Conference The U.S. Department of Energy's Weatherization Assistance Program (WAP) strongly encourages all Grantee Managers to attend the 2018 National Association for State Community Service Programs (NASCSP) Annual Conference, scheduled for Sept. 19-21, 2018, in Bellevue, Washington. | 6/7/2018 | Unclassified | Active Memorandums |
| WAP Memorandum 036: Energy Auditor and Quality Control Inspector Certification Scheme Updates The U.S. Department of Energy (DOE) implemented the Quality Work Plan (QWP) in Weatherization Program Notice (WPN) 14-4, Quality Work Plan Requirement, in 2013. In 2014, WPN 15-4, Quality Work Plan Requirement Update, superseded WPN 14-4. Both guidance documents describe the Weatherization Assistance Program (WAP) requirements for inspection and monitoring of work in section 3. | 5/16/2018 | Training | Active Memorandums |
| WAP Memorandum 035: Weatherization Leveraging This Memorandum serves to update and clarify information contained in Weatherization Program Notice (WPN) 15-5, Weatherization Assistance Program | 5/16/2018 | Multifamily | Active |

Type

 Active Memorandums
 Active Program Notices
 Archived Memorandums
 Archived Program Notices

Topic

 Administrative Costs
 Clients
 Defining Income
 Disaster Relief
 Electric Baseload
 Eligibility Levels
 Eligible Dwelling Units

- New WAP site on the EERE website offers searchable Program Guidance and Memos
- Keyword searches
- Topical searches
- Active/Archived

<https://www.energy.gov/eere/wipo/weatherization-program-guidance>

Weatherization Program Updates

- New feature for WAP
- Can “opt in” to receive an email with the latest program notices and memorandums
- From the Program Guidance page

ENERGY.GOV Energy.gov Offices National Labs Search Energy.gov

Office of ENERGY EFFICIENCY & RENEWABLE ENERGY About Us Initiatives SERVICES EFFICIENCY RENEWABLES TRANSPORTATION

Weatherization Program Guidance

Home » Weatherization Assistance Program » Weatherization Program Guidance

The U.S. Department of Energy's (DOE) Weatherization Assistance Program (WAP) is governed by various federal regulations designed to help manage and account for the resources provided by DOE. Each year, Congress passes a Weatherization Assistance Program Appropriation. Find active and archived weatherization program notices and memorandums in the table below, which establish the framework for administering WAP funds. To receive the latest program notices and memorandums, please [sign up](#) for our newsletter.

Search:

WEATHERIZATION PROGRAM GUIDANCE

Showing 1 to 10 of 213 entries

| DESCRIPTION | EFFECTIVE DATE | TOPIC | TYPE |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--------------|--------------------|
| WAP Memorandum O40: Allowable Use of Training Funds for the National Community Action Partnership's 2018 Annual Convention The 2018 National Community Action Partnership's (NCAP) 2018 Annual | 7/11/2018 | Unclassified | Active Memorandums |

Active Memorandums

Solution Summit

- WAP and the National Renewable Energy Laboratory (NREL) sponsored a series of four collaborative meetings called Solution Summits across the U.S. to bring together professionals crucial to the delivery of weatherization services.
- Convened more than 60 weatherization stakeholders – Grantees, Subgrantees, Training Centers and advocates.
- The goals were to:
 - Identify barriers to delivering quality weatherization services.
 - Draft a list of ideas that could assist stakeholders with effectively and efficiently managing weatherization programs.

Solution Summit – Identified Barriers

- Lack of funding for staff.
- Weatherization service providers are trying to comply with multiple programs.
- Lack of emphasis at all levels on training opportunities for non-technical staff.
- WAP requires extensive experience to implement effectively.
- Technical requirements can be seen as complex and lengthy.
- Challenges may not be communicated within and across organizations.
- Lack of accountability at all levels.

Solution Summit | Simplify

| IDEA | BENEFITS | DOE NEXT STEPS | TIMELINE |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|
| <p>Create quick links to the most relevant Weatherization Program Notices (WPNs), memorandums and summary tables highlighting program changes</p> | <p>Makes program requirements and resources easy to find, allows for consistent messaging, provides a feedback mechanism, saves time/money, lowers stress</p> | <p>Develop specific training on the WPN/Memo Table found in WPN -1</p> <p>Develop training on EERE/WAP website and how the program guidance and memo table and search works</p> | <p>By the end of 2018</p> |
| <p>Continue working to reduce the total number and length of active WPNs and memorandums</p> | <p>Reduces complexity, allows for easier communication, frees up resources, focuses on the details that matter, encourages buy-in, builds confidence, saves time/money</p> | <p>Develop a clear simple criteria for when WPNs will have an open comment period.</p> <p>Have EERE WAP program guidance/memo table search default to active guidance and memos only.</p> <p>Watermark all archived WPNs/Memos and have them updated via NREL once a year.</p> <p>Continue providing webinars to Network to identify potential and final WPN/Memo changes.</p> | <p>By the end of 2018</p> <p>Implemented</p> |
| <p>Consider establishing a federal priority list that captures fewer measures but increases the number of homes that receive energy conservation measures (ECMs) with historically high savings to investment ratios (SIRs); essentially a preapproved prescriptive path for Grantees</p> | <p>Reduces complexity, saves time/money, makes for easier onboarding and training, promotes simplified quality control/quality assurance (QA/QC)</p> | <p>Work with Weatherization Network Solutions Summit Group to continue this discussion to review all ideas, structures and options.</p> | <p>2-5 years</p> |

Solution Summit | Communications

| IDEA | BENEFITS | DOE NEXT STEPS | TIMELINE |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|--------------------|
| Explore a variety of communication tools/venues when sending program updates, in addition to emails and conference calls | Improves access to information, encourages buy-in, builds trust | Establish for the Weatherization Network the ability to “opt in” for program updates emails via GovDelivery system. | Implemented |
| | | Continue DOE participation on quarterly NASCSP regional conference calls. | Implemented |
| | | Continue recording Grantee webinars on key topics or updates. | Implemented |
| | | Develop a WAP Communications Portal for Network. | By the end of 2019 |
| Clarify the application of the Standard Work Specifications (SWS) | Improves stakeholder understanding of SWS, allows for more consistent application of SWS, saves time/money, increases likelihood of compliance | Work with SWS committees to draft reasonable requirements and build consistency. | By the end of 2019 |
| Require an executive summary at the beginning of state plans that highlights everything that has changed from the previous year; redline changes to language throughout individual sections | Additional method to convey information to subgrantees, more effective and efficient communication, easier for stakeholders to understand | Work with NASCSP to train Grantees on creating executive summaries templates and examples for changes in Annual Plans. | By the end of 2019 |

Solution Summit | Communications, cont.

| IDEA | BENEFITS | DOE NEXT STEPS | TIMELINE |
|-----------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|
| <p>Make Grantees accountable for communicating new program requirements, WPNs and memorandums</p> | <p>Increases information transfer, builds trust, allows for more efficient workflow, increases likelihood of compliance</p> | <p>Support WAP Grantees to continue to implement their ACSI survey plans and require the activities within their PY19 WAP state plan.</p> <p>Work with NASCSP to promote and train Grantees on best practices to communicate to the Subgrantee Network.</p> | <p>By the end of 2019</p> <p>By the end of 2019</p> |
| <p>WAP management should coordinate with POs to ensure timeliness and consistency</p> | <p>Enables more consistency in the field, increases understanding of WAP requirements, allows for more efficient workflow, builds trust</p> | <p>Establish standard processes and procedures for general WAP Grantee management activities (e.g. WAP Project Officer Desk Guide).</p> | <p>Implemented but updating</p> |
| <p>Utilize e-learning platforms and best practices to communicate program updates, share technical materials and case studies, etc.</p> | <p>Increases information transfer, allows for consistent messaging, can track learning, tests knowledge and skills</p> | <p>Include training resources within each WPN or Memo that support the new or expanded program requirement.</p> | <p>1-2 years</p> |

Solution Summit | Streamline

| IDEA | BENEFITS | DOE NEXT STEPS | TIMELINE |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| Create a "Welcome to WAP" package for all new hires | Provides clarity of job requirements, establishes accountability, allows for more efficient workflow, enables consistent training, reduces frustration, saves time/money | The WAP Project Officer team will create a "Welcome to WAP" training package for new managers and other key staff. | Managers by 2Q 2019 Other staff by end of 2019 |
| Utilize peer exchange to help poor-performing states | Increases use of proven strategies, builds confidence and trust, encourages collaboration, strengthens the overall network, saves time/money, increases quality, builds skills | Work with Weatherization Network Summit Group and stakeholders to continue this discussion to review all ideas, structures and options to identify the best path forward. | 1-3 years |
| Work to align diverse programs, sponsors and organizations working to support low-income households | Encourages leveraging of multiple funding sources, saves time/money, reduces complexity, results in more upgrades/savings, produces more comprehensive repairs with fewer federal dollars, reduces deferrals | Work with Weatherization Network Solution Summit Group to continue this discussion to review all ideas, structures and options to identify the best path forward. | 2-5 years |
| Require annual training on 10 CFR 440 and new WPNs to be delivered by DOE staff (or curriculum developed by the program to be delivered by grantees or training centers) | Keeps stakeholders up to date, allows for more efficient workflow and more consistency in all aspects of work, provides WAP an ongoing opportunity for feedback and improvement | Work with Trainers Consortium to develop a training on the regulations. Create document and incorporate into the Welcome to WAP package training (see above) | 1-2 years |

Solution Summit | Streamline

| IDEA | BENEFITS | DOE NEXT STEPS | TIMELINE |
|---------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| Develop an annual guide to WAP-centric training opportunities for procedural, fiscal and administrative staff | Enables more efficient and effective program operation, can on-board non-technical staff more quickly, allows for better cross-training, builds confidence, builds skills specific to WAP requirements | <p>Use the new WAP regular email updates via the GovDelivery system to provide the upcoming training webinars offered in the month/next month.</p> <p>Coordinate with WAP training centers and Trainers Consortium to identify possible improvements to communicate available trainings based on area.</p> | <p>By end of 2018</p> <p>1-2 years</p> |

Solution Summit | Financial Flexibility

| IDEA | BENEFITS | DOE NEXT STEPS | TIMELINE |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| <p>Assess the organization of different low-income assistance programs within a high-performing Grantee</p> | <p>Creates a resource for the network, applies proven strategies, increases funding, saves time/money, increases quality</p> | <p>Work with Weatherization Network Solution Summit Group to continue this discussion to review all ideas, structures and options to identify the best path forward.</p> | <p>1-2 years</p> |
| <p>Conduct a wage study to document current/projected labor costs for Grantees and Subgrantees</p> | <p>Better aligns salaries/ budgets with market expectations, reduces staff turnover, secures competent trades, maintains program/project schedules and budget</p> | <p>Complete research on what studies or data is already available through the Weatherization Network and identify the specific areas that need studies performed.</p> | <p>1-2 years</p> |
| <p>Create measurable goals beyond households served or ECMs installed. Example: workforce development — WAP has created an industry, training thousands of skilled tradespeople.</p> <p>NOTE: We recognize that this is a regulatory requirement and that any changes would entail working through general counsel</p> | <p>Documents impacts beyond energy and utility bill savings, strengthens support from program sponsors and their constituents, justifies expenditures, increases worker productivity, grows demand for weatherization trainees, creates jobs, grows the economy, increases grid reliability, improves health and safety outcomes</p> | <p>Work with Weatherization Network Solution Summit Group to continue this discussion to review all ideas, structures and options to identify the best path forward.</p> | <p>2-5 years</p> |

Solution Summit | Accountability

| IDEA | BENEFITS | DOE NEXT STEPS | TIMELINE |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| Establish an environment that explicitly assigns failure to the process, not people | Surfaces problems and inefficiencies, fewer mistakes covered up or ignored, encourages process improvement, increases morale | Work with Weatherization Network Solution Summit Group to continue this discussion to review all ideas, structures and options to identify the best path forward. | 1-2 years |
| Build a feedback mechanism for all members of the network | Surfaces problems and inefficiencies, increases morale, allows for sharing of lessons learned, encourages process improvement | Develop the WAP Communications Portal for the Network to use and post questions. Conduct an ACSI survey in 2019 for Weatherization Subgrantees. | 1-2 years |
| Use data collected through current quality assurance processes and risk assessments | Focuses attention on current issues/failures, invests resources in the issues that provide the greatest savings, increases stakeholder buy-in, encourages accountability, eliminates opinion | Share onsite good & bad photos from monitoring and technical assistance visits with the Network (NASCSP meetings, trainers consortium, etc.) and record webinars. | 1-2 years |
| Encourage all levels of the network (i.e., WAP, training centers, grantees and subgrantees) to develop an organizational blueprint that clarifies responsibilities and establishes accountability through clearly written policies | Increases accountability, reduces the need for judgment calls, motivates employees, builds skills | Work with Weatherization Network Solution Summit Group to define Define job descriptions/roles and responsibilities at all levels of Weatherization. | By the end of 2019 |

GHEP Update – Energy Auditor/QCI

- Revisions to the JTAs for EA and QCI have been completed. We are awaiting the final report from the psychometricians and anticipate making that final document available by Summer 2019.
- This revision process is part of the normal maintenance of the JTA per industry standards.
- The "soft skills" have been removed from both JTAs. Those soft skills-related KSAs are now included in a competency model for use by training providers and others.

Primary Outcome:

- Recognition that the majority of the technical KSAs in both the EA and the QCI were identical and that the two JTAs could be streamlined into 1 "main" JTA (EA) and one "mini" JTA (QCI) that includes ONLY those items not already covered by the EA JTA.

GHEP Update

Key Changes for the WAP Network

Training centers

- Ability to streamline training programs to offer a complete EA training and then offer a shorter QCI course that aligns with the updated JTA and covers only those items not already covered in EA.

Individuals

- In order to be a certified QCI, you will need to hold an active EA certification. We are still finalizing details of how that will work for people who are recertifying (already hold QCI), but do not foresee any major issues. The current plan is that candidates will need to show that they meet the pre-requisites for the EA certification and pass a field exam.

GHEP Update

- There will not be a change to the Quality Work Plan as a result of these revisions.
- The new exam structure is expected to be up and running in mid-2019, but again, given the similarities between the current structure and the new structure, there shouldn't be any need for major changes to a Grantees training plans or a WTCs curriculum as a result.

QUESTIONS?



erica.burrin@ee.doe.gov