



Agency

## WAP Operations Plan Checklist

Program Year

Date Submitted

1. A complete, current copy of the agency liability insurance policy that contains all attachments and schedules pertaining to Weatherization.
2. Local agency client education plan: (attach a summary narrative outlining your agency's client education efforts. Be sure to cover the items below)
- i. Identified client education personnel & duties assigned
  - ii. Client education procedures
  - iii. Client education materials used

3. Salary spreadsheet: (Complete Weatherization Salaries Attachment #15)
- i. By job description complete a line for every full or part time employee that is being paid from Weatherization funds.

4. Agency's Weatherization Policies and Procedures. (Provide copy or link to website)

The agency's Weatherization Policies and Procedures are a standalone document or combination of documents that details the local operation of the agency's program. This document would be used when key personnel were unable to perform their responsibilities or when training a replacement.

**Key Personnel** are: Wx Coordinator, Energy Auditor, QCI Inspector, individual list as the agencies contractor license qualifier, Financial Specialist.

**Critical Tasks** are: Requesting of funds, submitting completed projects to the State Wx office, Client Qualification, Energy Audits, Quality Control Inspections, Sub-contracting, Job closeout, Lead Inspections, Lead Safe Weatherization, Wx materials purchasing, coding of program expenses to WX funds.

This manual, at a minimum, needs to outline internal procedures for the following items:

- Inventory Control
- Client data privacy & security
- Client qualification process & waiting list management
- Wx materials purchasing
- Key personnel duties & responsibilities
- Requesting of funds
- Required reporting to State Wx
- Sub-contracting procedures & management of subs
- Wx production process
- Job closeout procedures
- Admin leave policy
- Wx expense coding



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- 5. Weatherization property inventory. List must contain:
  - i. All vehicles.
  - ii. All property with a purchased value of \$5,000 or greater.
  - iii. The purchase date, funding source used, and any tracking or serial number.
  
- 6. Client application packet.
  
- 7. Completed [Attachment #15 Contract Signature Certification Page](#)
  
- 8. Verification of Utah contractor's license and qualifiers
  
- 9. Verification of agency required 3rd party certifications.
  - i. RRP Lead Renovator Firm & Individual. (copy of certificate)
  - ii. OSHA 30 & 10 hour card holders. (list with just names and expiration date)
  - iii. Utah DEQ Lead Inspector. (list of names and expiration date)
  - iv. Rocky Mountain Gas Association certification (list of names)

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Signature

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Title