

POSITION: Weatherization Intake and Reporting Coordinator

Full Time, Non-Exempt Pay Rate: \$22.00 to \$26.40, based on experience

LOCATION: Sturgeon Bay

SUPERVISORS: Director of Program Access and Reporting

Program Services Procurement and Training Manager

GENERAL RESPONSIBILITIES: This position is responsible for coordinating the customer application, intake, and outreach functions for Partners for Community Development's Weatherization Program. The position serves as a primary point of contact for program applicants, providing information, processing applications, verifying customer and property eligibility, maintaining client records, and scheduling home energy assessments. This role will take the lead on Weatherization intake and outreach activities in Door and Kewaunee Counties and supports the successful implementation of Weatherization and related Program Services activities.

The position works closely with Program Services, Procurement and Training, Operations, Reporting, Inventory, and field staff to ensure efficient program delivery, regulatory compliance, and high-quality customer service. In addition, the position assists with program reporting, invoicing, quality control activities, and cross-training efforts to support departmental operations.

JOB DUTIES:

Weatherization Program:

- Maintain professional business confidentiality, and professional etiquette – assist in all aspects of the programs as required or instructed. Read, decipher and familiarize yourself with the contents of the DEHCR Weatherization and Program Services rules and policies, to assist the implementation and success of the program.
- Communicate openly and professionally with partner organizations, property owners and managers, funding source representatives, tenants, and eligible customers, providing necessary information about Partners' programs.
- Actively seek new customers - contact potentially eligible people by utilizing resources and features of the DEHCR Home Energy Plus system and other innovative outreach methods.
- Coordinate outreach activities with a focus on Door and Kewaunee counties with other agency staff and community/network stakeholders. Organize and attend outreach events as required. Represent the agency at conferences and other community events. Actively seek client and contact potentially eligible persons for the Partner's Weatherization Contract intake/outreach goals and objectives.

- Coordinate and complete client intake process for Partners' Weatherization Program. Responsibilities include communicating with prospective clients, processing applications, verifying eligibility, compiling all necessary documentation in accordance with state and program requirements, and processing applications and supporting documentation in a timely manner.
- Manage information responses for Partners' Weatherization Program, including sending application materials to interested parties and assisting customers in completing application materials.
- Learn and perform file deferral/denial process in coordination with energy auditors and field staff. Maintain deferral database, generate client letters, and ensure proper document filing.
- Maintain internal databases/spreadsheets, including but not limited to the energy audit tracking, application intake tracking, and outreach tracking.
- Monitor and stay current on policy and program changes to ensure Partners' Weatherization Program intake and outreach activities remain compliant.
- Assist with the procurement and recordkeeping for materials, services and equipment, including the preparation of purchase orders and processing invoices.
- Train with Weatherization Reporting and Operations Specialists to serve as a backup/support in monthly Weatherization Program reporting.
- Perform administrative functions to assist staff with special projects and responsibilities as requested and when it is feasible.
- If based outside the Sturgeon Bay office, regular travel to the Sturgeon Bay office is required, including working onsite at least one day per week.

Program Services:

- Assist Program Services, Procurement and Training Manager as assigned in the coordination of Program Services across Partners' service territory.
- Attend weekly production meetings. Coordinate with Program Managers and staff technicians regarding the status of Program Services projects as necessary.
- Maintain agency Home Energy Plus account, including adding sufficient client/project notes to the HE+ system, and accurately bill completed projects, uploading all required documents within program mandated timeframes.
- Coordinate with Procurement and Training Manager and agency finance staff regarding the invoicing the monthly EF Program Support and Administration costs.
- Other duties as assigned.

QUALIFICATIONS:

- Associate degree in business administration or related field preferred but not required.
- Excellent written and verbal communication skills.
- Attention to detail and excellent organizational skills.
- Public relations experience.
- Strong computer skills including Microsoft Office proficiency.
- Ability to work effectively with individuals from diverse cultural backgrounds.
- Wisconsin driver's license, auto insurance, and a good driving record required.
- Bilingual in English and either Spanish or Hmong preferred but not required.

PHYSICAL REQUIREMENTS:

- Prolonged periods of sitting at a desk and working on a computer.
- Occasional lifting to 40 pounds.