



## CSR / PROGRAM SUPPORT

### Position Overview

Assist the repairs, weatherization, energy and utility programs in facilitating services by determining client eligibility, scheduling clients, and staff throughout the various phases of work, and maintaining accurate administrative records.

### Essential Job Objectives

- Verify client income eligibility, home ownership, utility information, and all other documentation needed to qualify for services.
- Confirm client eligibility for specific home repair and weatherization programs:
  - Ensure clients are in the correct municipality or region for specific programs
  - Review job histories to confirm that clients are still eligible for services
  - Identify priority for service points for state weatherization programs
  - Maintain waiting lists in utility assistance databases for state weatherization programs
- Update client histories with appropriate notes to reflect the work performed under each job.
- Use state utility assistance databases to identify potential clients for weatherization and energy efficiency programs and determine eligibility based on program parameters
- Engage prospective clients via cold calling/texting and direct mail marketing.
- Schedule in field technicians for initial and quality control visits for energy efficiency and weatherization programs:
  - Initial energy audits and home assessments and quality control inspections
  - Energy education programs and follow-ups
  - Program monitoring visits
- Ensure all in field technicians have proper paperwork in order to perform their work.
- Build client profiles in utility assistance databases for all state weatherization projects including:
  - Income verification
  - Utility information and annualized costs
  - Housing information, basic building profile, and diagnostic testing from initial assessment and quality control inspection
- Review completed state weatherization job files to ensure all paperwork is present, including:
  - Income verification
  - Priority for service documentation
  - Daily time-sheets
  - Job site photos
  - Diagnostic testing documentation
  - Lead certification documentation
  - Client notification documentation

Position Requirements:

- Intermediate working knowledge of MS Office suite
- Previous experience with MS Dynamics or other ERP/CRP systems
- Ability to learn OCEAN reporting or knowledge of other similar databases
- Valid driver's license and auto insurance.

Education:

- High School diploma/GED Equivalent Experience
- Customer Service experience preferred.

Other Skills:

- Represents PWC at community functions and provides education to stakeholders and clients.
- Ability to read and interpret documents such as safety rules, operating and maintenance instructions, and procedure manuals.
- Ability to write routine reports and correspondence.
- Valid driver's license and auto insurance.

Physical Demands:

- Ability to work with hands
- Ability to talk and hear
- Ability to stand, walk, use hands to fingers, hand or feel objects, reach with hands and arms, climb or balance, and stoop, kneel, crouch, or crawl.
- Ability to sit for long periods of time.
- Ability to lift or move objects up to 25 pounds.
- Vision abilities include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus.

Work environment:

- Office environment
- Occasional field work

**EOE/M/F/Disabled/Vets.**