



# T&TA Plans

February 27, 2015

# Session Overview

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- QWP and what DOE expects in T&TA plan
- Forms & Procedures for inspections and work, SWS-aligned
- QCI certifications – achieving state coverage when you have no accredited Training Center
- QCI certifications – Achieving state coverage when you have very few certified staff
- Training options – Tier 1 & 2 clarification, options/flexibility



## V.8.4 Training and Technical Assistance

### Review of QWP:

- Section 1 – Defines the work standards
- Section 2 – Distribute standards to network
- Section 3 – Evaluate based on the standards
- **Section 4 – Give them the tools (training) to meet the standards.**





## V.8.4 Training and Technical Assistance

Identify and address training needs.





## V.8.4 Training and Technical Assistance - Questions

- What kind of training does your network need this year?
  - Multifamily for inspectors?
- Will you pay to train contractors? If so, how will you make sure they stay in the program?
- How do you track maintenance of required credentials?
- How do you tailor trainings to reflect monitoring reports?
- How do you handle client education?



## V.8.4 Training and Technical Assistance

Specific areas updated:

- Multifamily
- Tier 1 (comprehensive)
- Tier 2 (single issue, conferences)



## V.8.4 Training and Technical Assistance - Multifamily

- No certification available for MF QCI
- Job Task Analysis (JTA) is available

### Requirement:

- **Successful training based on MF QCI JTA**



## Quality Work Plan Checklist and Resources – Section 4

State staff can use this list of questions and related resources to help implement the Quality Work Plan. Each question includes reference to where in 15-4 the guidance behind the question is found, and where in the 2015 Application Package you will describe the answers to DOE.

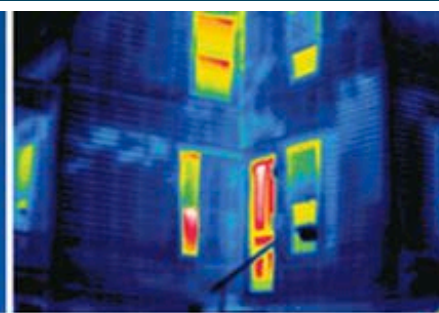
The last question applies only to Hawaii and the Territories, and the previous 4 questions do not apply to Hawaii and the Territories.

App Section	15-4 Section	Checklist Item	Yes	No	Resources
V.8.4	4	Have you developed a training plan?			
		<b>If yes, date submitted:</b>			
V.8.4	4	Does the training plan include a definition of WAP field workers that will be trained using T&TA dollars (i.e., only agency staff, include contractor installers, HVAC technicians)?			
V.8.4	4	For Tier 2 training (issue-specific training addressing identified deficiencies as needed), have you determined who your training provider(s) will be?			<a href="#">WAP Standardized Training Curricula</a> <a href="#">WAP Training Centers</a>
		Do you have a feedback mechanism so monitoring reports can trigger Tier 2 training when deficiencies are identified?			
V.8.4	4	Does your training plan describe the frequency of comprehensive Tier 1 training for each job category as defined?			
		Have you decided if you want to meet the Tier 1 training over time or in intensive 1 – 2 week full-on training sessions?			
V.8.4	4	If comprehensive training will be delivered over time, does your training plan include a method for tracking the coverage of tasks in the JTA to ensure all necessary personnel receive full training?			<a href="#">NREL Job Task Analyses (JTAs)</a> The 2.0 versions of <a href="#">WAP Standardized Curricula</a> include Master Bibliographies with a spreadsheet listing JTAs.





# Resources



- Basics
- Rules & Guidance
- Technical Tools
- Public Information
- Best Practices
- Training Resources
- Wx Plus Health
- Contacts

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## DOE Quality Work Plan Resources

The Department of Energy's Weatherization Assistance Program is instituting a comprehensive quality work plan that will establish the benchmark for quality home energy upgrades. DOE officially made available its new [Quality Work Plan \(QWP\)](#), which outlines the requirements for high-quality home energy upgrade work within the Weatherization Assistance Program (WAP).

The QWP defines what is required when federal dollars are used to purchase weatherization services and leverages the resources developed through the [Guidelines for Home Energy Professionals](#) project. These resources include [Standard Work Specifications for Home Energy Upgrades](#), [accredited training](#), and [advanced Home Energy Professional Certifications](#). The QWP not only defines how home energy upgrade work should be done, but it also outlines requirements for communication, training, and the inspection of work completed within the WAP program.

### [Guidelines for Home Energy Professionals](#)

The DOE Guidelines for Home Energy Professionals project helps establish a national residential energy upgrade industry and a skilled and credentialed workforce. The project creates standard work specifications, advanced professional certifications for workers, and accredited training programs.

# Checklists - Sws.nrel.gov

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Standard Work Specifications Tool

Search All Topics  Go

Health & Safety | Air Sealing | Insulation | Heating & Cooling | Ventilation | Baseload

## Standard Work Specifications for Home Energy Upgrades

Standard Work Specifications (SWS) are a major component of the Guidelines for Home Energy Professionals project and define the minimum requirements to ensure that the work performed during home energy upgrades is effective, durable, and safe. The SWS can be used as an industry guide for workers, training instructors, homeowners, and program administrators involved in the home performance industry.

**Learn**  
how to use this tool

**Read**  
an introduction to the Standard Work Specifications

### Guidelines for Home Energy Professionals Project Resources

- [Find Accredited Training](#)
- [Get Certified](#)
- [Meet the Quality Work Plan Requirements](#)

### News & Updates

December 15, 2014  
**Video: Raising the Bar within the Weatherization and Home Performance Industry**

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August 26, 2013  
**Enhanced Print Functionality Now Available**

[Read all News & Updates](#)

### How To Video



[How to use the Standard Work Specifications \(SWS\) Online Tool](#)

Home » Weatherization Assistance Program » Guidelines for Home Energy Professionals » Quality Work Plan Requirements

## QUALITY WORK PLAN REQUIREMENTS

[Weatherization & Intergovernmental Programs Office Home](#)

[About the Office](#)

[Weatherization Assistance Program](#)

[Where to Apply for Assistance](#)

[What is Weatherization](#)

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[Guidelines for Home Energy Professionals](#)

[About the Project](#)

[Quality Work Plan Requirements](#)

[Standard Work Specifications](#)

The U.S. Department of Energy's Weatherization Assistance Program (WAP) has introduced a comprehensive Quality Work Plan (QWP) that will establish a benchmark for quality home energy upgrades. This plan defines what is required when federal dollars are used to purchase weatherization services and leverages the resources developed through the [Guidelines for Home Energy Professionals](#) project. Below you will find links to QWP guidance, as well as links to the individual requirements.

This QWP not only defines how home energy upgrade work should be done, but it also provides a prescription for communication, training, and the inspection of work throughout the WAP network. The plan is aimed to address three critical questions:

- What does quality work look like?
- How should workers be trained?
- How should home energy upgrade work be verified?

### LINKS TO QUALITY WORK PLAN GUIDANCE

- [WPN 15-4: Quality Work Plan Requirement Update](#) - Effective October 21, 2014: This guidance provides updates to WPN 14-4 issued December 2, 2013. This guidance supersedes 14-4 and describes requirements to support and verify quality work in the Department of Energy's (DOE) Weatherization Assistance Program (WAP).
- [Integrating WPN 15-4 into the WAP 2015 Application Package](#) - This video provides information for Creators in the



**GUIDELINES AND STANDARDS REQUIREMENT**



**COMMUNICATIONS REQUIREMENT**



**INSPECTION AND MONITORING REQUIREMENT**



**TRAINING REQUIREMENT**

- Note to Bob – Insert other participants' slides here.



## V.8.4 Training and Technical Assistance

### Addressing Training Options:

Tier 1

Tier 2



# Tier 1 Training Definition

- Comprehensive
- Occupation-specific
- Aligned with Job Task Analysis (JTA) for occupation
- Administered by (or in cooperation with) accredited training center



Tier 1 training could be likened to going to the firefighters academy.  
You learn everything needed to be a firefighter.

# Tier 2 Training Definition

- Single-issue
- Addressing deficiencies in the field
- No federal requirements for training staff
- Conference trainings are considered Tier 2



Tier 2 training could be likened to doing a fire drill – learning what you need to know to deal with immediate concerns.

Or to use another analogy...



# If T&TA stood for Teeth and Tooth Aches

- Tier 1 is your regular bi-annual cleaning.
- Tier 2 is the emergency visit when you break a tooth.



Tier 1



Tier 2





## V.8.4 Training and Technical Assistance – Tier 1

“...must be delivered by,  
or in cooperation with,  
an accredited training provider...”



## V.8.4 Training and Technical Assistance – Tier 1

- How do you meet this requirement?
- What does, “in cooperation with” mean?



# Tier 1 Options – Send workers; Comprehensive

- Send workers to training center for complete, accredited training.



# Send Workers; Comprehensive – Pros and Cons

## Pros:

- Simple
- Fast
- Controlled
- Consistent



## Cons:

- Cost
- Time out of field
- “Vacation” syndrome



# Tier 1 Options

- Bring training center to you (they all travel) for concentrated Tier 1 training.



# Bring Trainers; Comprehensive – Pros and Cons

## Pros:

- Fast
- Field training
- Accurate Housing stock
- Your equipment



## Cons:

- Logistics
- Finding suitable houses
- Prep work



# Tier 1 Options

- Combine distance and/or on-line learning with in-person instruction.



# Combine Distance & In-person – Pros and Cons

## Pros:

- Identify remedial needs
- Cost
- Bang for buck
- Computer skills
- Improve in-person training
- Time



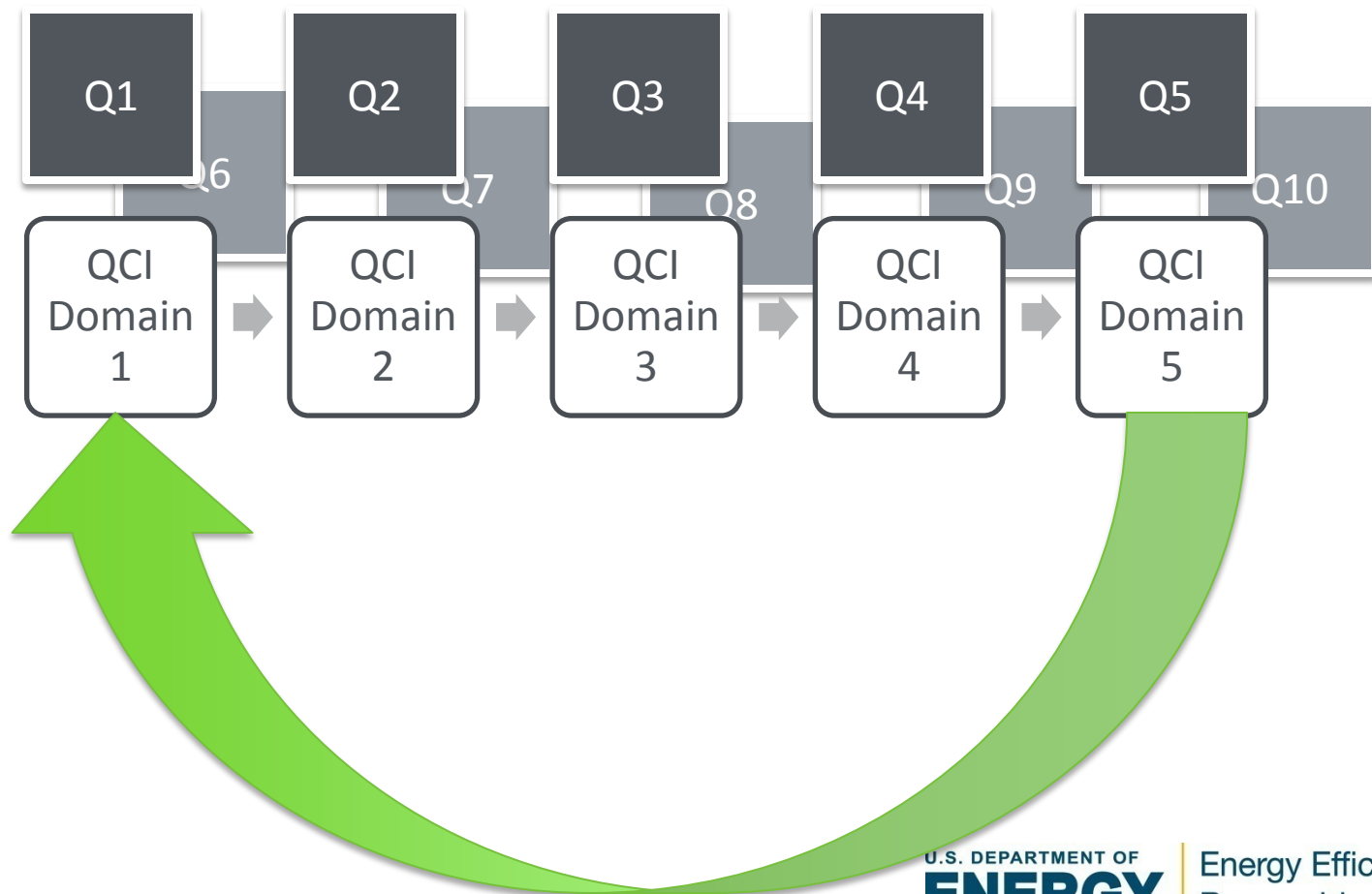
## Cons:

- Network resistance



# Tier 1 Options

- Arrange for training delivery over the course of months to eventually cover entire JTA.



# Long delivery schedule – Pros and Cons

## Pros:

- Smaller times away from field
- Rolling delivery good for staff turnover



## Cons:

- Additional time overall
- Tracking
- Testing/revie w issues



# Tier 1 Options

- Incorporate state-specific sessions into Tier 1 training to cover all technical training needs at once.



# Incorporate state-specific sessions – Pros and Cons

## Pros:

- Hit key issues while fresh in minds
- Address all training needs at once
- State staff = technical resource



## Cons:

- Staff time for WTC reviews
- Additional costs
- May not always fit schedule



# Technical Integrity = Program Integrity

- Define the work
- Share the definition
- Check the work
- Provide access to training



# Review

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- Forms & Procedures for inspections and work, SWS-aligned
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