

# National Association for State Community Services Programs

20  
17 **A N N U A L**  
*Training Conference*



## Incorporating Monitoring Results into Training Plans

Kelly Cutchin & Ray Judy

SMS & NASCSP



# Incorporating Monitoring Results Into Training Plans

## ➤ What is training?

- A comprehensive human development program with the objectives of *changing behavior and enhancing performance* so they match the mission of the organization.



# *Some questions for you:*

- Why do you provide training?
- How do you determine what training to provide?
- How do you determine if that training was effective?



# Incorporating Monitoring Results Into Training Plans

A bit about Training Needs Analysis



# *Training Needs Analysis*

- A systematic approach to determine what training needs to take place.
- Can be described in 8 steps.



# *Training Needs Analysis – Step 1*

- Determine the desired outcomes
  - Goal should correspond to a company/program objective
  - Examples:
    - Reduce call-backs by 50% in one year.
    - Improve speed of installations while maintaining work quality at current levels.
    - Reduce identified missed opportunities by 75% in 1 year



# *Training Needs Analysis – Step 2*

- Link Desired Outcomes with Employee Behavior
  - Identify needed competencies (JTAs are very helpful!)
    - What skills are needed to achieve this goal?
    - What behavior is critical to completing this task?
- Example – Reduce Call-backs
- Skills/competencies include:
  - Arrive to work fit and on time each day
  - Correctly install all measures typically included in work scopes
  - Note discrepancies between work order/notes and on-site reality
  - ...etc.



# *Training Needs Analysis – Step 3*

- Identify Trainable Competencies
  - Evaluate the critical competencies to determine if they are:
    - Abilities one should possess prior to job entry, or
    - Abilities that can be learned on the job or through training





# *Training Needs Analysis – Step 4*

- Evaluate Competencies and Determine Performance Gaps



# *Training Needs Analysis – Step 4*

- Evaluate Competencies and Determine Performance Gaps
  - Evaluate current performance to identify where the gaps are between current ability and desired ability.
  - To evaluate current performance use:
    - Performance evaluations
    - Self assessments
    - Prior training results (assessments)
    - Interviews
    - Client feedback
    - Monitoring reports
    - Actual energy savings



# *Training Needs Analysis – Step 5*

- Prioritize Training Needs
  - Identify % of employees who need the training
  - Consider the importance of the competencies on the program objectives



# *Training Needs Analysis – Step 6*

- Determine How to Conduct Training
  - Consider adult learning theory – all of the WTCs are aware of these principles.
  - Training methods can range from:
    - OJT
    - Mentoring/coaching
    - Classroom/lecture
    - Web-based/distance learning
    - Reading
    - Management programs



# Training Needs Analysis – Step 7

- Cost/Benefit Analysis

- Consider costs associated with the training methods, the extent to which training will address the performance gap, and the impact on the program.
- Cost factors include:
  - Training time
  - Content development time (if done in-house)
  - Training provider evaluation (if purchased from outside)
  - Lost productivity from time spent in training
  - Travel and logistical expenses



# Training Needs Analysis – Step 8

- Planning for Training Evaluation
  - Training is only effective if the information is retained and applied on the job. Evaluation of training is critical.
  - Questions to consider in evaluation include:
    - How much did the training improve competencies?
    - How did the training improve job performance?
    - How did the training support meeting the goals of the organization/program?



- Now let's look at what needs to be in your plans...



# Incorporating Monitoring Results Into Training Plans

- WPN 17-1 Application Instructions – Section V.8.4 – T&TA
  - Applicants **shall** indicate the methods used to provide training and technical assistance to Sub-grantees, and the methods employed to ensure quality of work and adequate financial management control at the Sub-grantee level. While the overall approach to training, technical assistance, and monitoring may be constant, budgets and activities may change from year to year. For this reason, this section **must** contain a description of the activities to be undertaken during the program year with funds budgeted for training, technical assistance, and monitoring on SF-424A under either T&TA or Administrative cost categories.





# Incorporating Monitoring Results Into Training Plans

- WPN 17-1 Application Instructions – Section V.8.4 – T&TA
  - T&TA activities are intended to maintain or increase the efficiency, quality and effectiveness of the Weatherization Program at all levels. Such activities **must** be designed to maximize energy savings, minimize production costs, improve program management and crew/contractor “quality of work,” and/or reduce the potential for waste, fraud, abuse and mismanagement. The Sub-grantees should be the primary recipients of T&TA activities, although Grantee requirements for monitoring, training support and providing assistance **must** also be maintained.



# Incorporating Monitoring Results Into Training Plans

- WPN 17-1 Application Instructions – Section V.8.4 – T&TA
  - Grantees must ensure that all Tier 1 training paid for with WAP T&TA funds meet the requirements of **WPN 15-4, Section 4**: Training to Implement and Maintain Guidelines and Standards.
    - Grantees must provide a training plan that provides an **analysis** of training needs within the Grantee's program and a **description** of how the Grantee will ensure that all individuals trained with WAP funds will receive regular, comprehensive training in accordance with WPN 15-4. **Please note: this plan can span multiple program years.**



# Incorporating Monitoring Results Into Training Plans

- Grantees must describe the proposed training plan and milestones necessary to ensure the training plan is on pace to be accomplished. At a minimum, the plan must also address the following elements:
  - How does the Grantee training plan reflect feedback from DOE Project Officer monitoring visits, internal state audits, Grantee field monitoring visits, QA review visits, IG reports, etc.;
  - How is the Grantee maintaining workforce credentials; how are credentials tracked and how is training being planned and targeted to ensure maintenance of these credentials?;
  - What training the Grantee provide for Sub-grantee staff, whether attendance is mandatory, and the ramifications for non-compliance;



# Incorporating Monitoring Results Into Training Plans

- Training plan elements continued
  - A statement that staff may not function unsupervised until training and certification requirements are met;
  - How the Grantee plan reflect industry-wide initiatives and future program requirements (e.g., certifications, health and safety implementation, etc.);
  - How the Grantees partner with the statewide home performance industry on training issues, if applicable;
  - How the Grantee evaluates and compares the effectiveness and the energy savings achieved by its Sub-grantees in comparable structures and how these comparisons are used in the development of T&TA activities and priorities;



# Incorporating Monitoring Results Into Training Plans

- Training plan elements continued
  - An assessment of the Grantee and the anticipated T&TA activities necessary to ensure Grantee effectiveness in administering and implementing the grant;
  - What training activities are planned to execute the Grantee Health and Safety Plan;
  - How the Grantee approaches client education?



# Incorporating Monitoring Results Into Training Plans

- WPN 15-4 – Section 4 - Provide Training to Implement and Maintain Guidelines/Standards
  - Pursuant to Section V.8.4 of the Grantee Application Package submission, Grantees **must** submit a proposed training plan with milestones to **ensure** the training plan is on pace to be accomplished. The Grantee Application submission instructions provide elements that should be addressed as part of the submission. These include how the Grantee training plan reflects feedback from DOE Project Officer visits and **Grantee field monitoring visits**. In 2014 and 2015, this list will be expanded to include items outlined in this section.



# Remember...

- The purpose of monitoring is to make sure the program is running well.
- The purpose of training is to bridge the gap of where they are now, and where they need to be.
- If training isn't applied on the job, it was an expensive waste of time.



# *It's an on-going process*





# *Thank you!*

The end.

