

U.S. DEPARTMENT OF  
**ENERGY**

Office of  
**ENERGY EFFICIENCY &  
RENEWABLE ENERGY**

# WAP T&TA: Proper Uses & Developing a Plan

WEATHERIZATION ASSISTANCE PROGRAM

February 2018



# Objective

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**At the end of this session you will know:**

- **What T&TA info needs to be in the plan**
- **Where to find applicable regulations & guidance**
- **Activities that can be covered with T&TA funds**

**And you will be introduced to a systematic approach to T&TA planning and implementation.**

# T&TA Plan – Bare Minimum

- Describe proposed plan and milestones necessary to achieve it.



# T&TA Plan – Bare Minimum

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- How does the plan reflect feedback?
- How is the Grantee maintaining workforce credentials?
- Subgrantee training opportunities
- Requirements before working unsupervised.
- How the Grantee plan reflects future requirements.
- Statewide partners, if applicable.

# T&TA Plan – Bare Minimum

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- Energy savings comparisons re: training.
- Grantee assessment & follow-up activities.
- Health and Safety Plan-related training.
- Approach to client education.

If applicable:

- Contractor retention agreement

# T&TA Plan – Bare Minimum – Where to Learn More

- **WPN XX-1 – Current Program Year Guidance Application Instructions:**
  - Section III.2 – Section B: Budget Categories
    - Describes allowable expenditures
  - Section V.8.4 – Training & Technical Assistance
    - Describes Plan minimum requirements
- **WPN 10-1 – Sample Retention Agreement**

# Bare Minimum

- Technical training for field staff.



## T&TA – Eligible Costs

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- **Costs incurred in the training and technical assistance for any Grantee or Subgrantee**
  - Including monitoring and QCI training
  - Not limited to technical topics
    - Fiscal
    - Managerial
    - Change management
    - Whatever you determine you need to meet mission of WAP



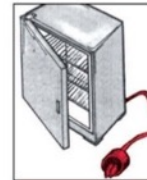
# T&TA – Eligible Costs

- Client education
  - Developing resources
  - Low-cost items
  - Activities



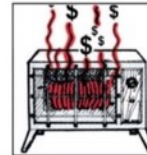
## What saves the most **ELECTRICITY?**

Electricity is sold in KWHs or kilowatt-hours  
1 KWH= 1,000 watts metered in one hour



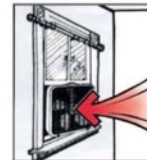
**Unplug that second refrigerator or freezer.**

SAVE  
**\$252** or 1,800 Kilowatt-Hours—Per Year



**Reduce your need for electric space heaters. Weatherize your house and wear winter clothing.**

SAVE  
**\$101** or 620 Kilowatt-Hours—Per Heater—Per Year



**Switch from Air Conditioning to fans to stay cool. Exhaust hot air when it's cooler outside.**

SAVE  
**\$49** or 350 Kilowatt-Hours—Per Family of 3—Per Year



**Electric usage adds up so turn off unused TVs, lights and appliances.**

SAVE  
**\$37** or 267 Kilowatt-Hours—Per Family of 3—Per Year

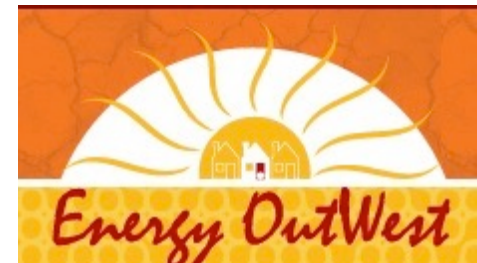
## T&TA – Eligible Costs

- Evaluation of Program outcomes.



## T&TA – Eligible Costs

- Participation, travel, logistics of training activities and events.
  - NASCSP
  - Energy Out West
  - HPC (National and regional conferences)
  - State conferences
  - Training planning meetings
  - And more



## T&TA – Eligible Costs

- Grantee purchases of vehicles or equipment, which are directly related to specific training and technical assistance activities, such as monitoring, etc.



# Some questions for you:

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

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# A bit about Training Needs Analysis

# Training Needs Analysis

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- 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

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- **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

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- **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?



# T&TA Planning & Reporting Template

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<https://energy.gov/eere/wipo/downloads/training-resources>

- Plan training
- Record reasoning
- Schedule & track
- Use as T&TA Report for next PY

# Resource Review

- **WPN XX-1 – Current Program Year Guidance Application Instructions:**
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- **WPN 10-1 – Sample Retention Agreement**
- **T&TA Planning & Reporting Template:**
  - <https://energy.gov/eere/wipo/downloads/training-resources>
- **List of Weatherization Training Centers:**
  - <http://www.waptac.org/Regional-WAP-Training-Centers.aspx#State>

# Remember...

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- 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



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Questions?

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