



U.S. DEPARTMENT OF
ENERGY

Energy Efficiency &
Renewable Energy



Weatherization Assistance Program Training & Technical Assistance Plan



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V.8.4 Training & Technical Assistance

Training and Technical Assistance Applicants shall indicate:

- Methods used to provide training and technical assistance to Subgrantees.
- Methods employed to ensure quality of work at Subgrantee level.
- Methods to ensure adequate financial management control at the Subgrantee level.

Methods to provide T&TA



Not just for Technical Staff

Training & Technical Assistance dollars are available for ANY needed training. Not sure? See QMP resources!

Grantee-Level Weatherization Assistance Program (WAP) Specific	
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At the Grantee level, this individual(s) ensures the Grantee is in compliance with applicable "higher order" (non-Program specific) requirements that must be present in any organization accepting grants (and administering subgrants) from the federal government.	
DOMAIN I:	Collaborate to Ensure Grant Compliance
Task 1:	Coordinate effectively with Grantee-level, non-WAP specific Manager on all "higher order" requirements necessary for effective implementation of the Weatherization Assistance Program
Task 2:	Coordinate with Grantee-level Technical Specialist to ensure technical elements of the Program are implemented
Task 3:	Coordinate all elements of the Grant Application Package
Task 4:	Engage Grantee-wide network (via public hearing(s), committee meetings, PAC, etc.) to ensure effective implementation of grant
DOMAIN II:	Establish Grantee-Wide Policies for Program Implementation
Task 1:	Develop and/or update Grantee Weatherization Policies and Procedures Manual (includes incorporation of technical guidelines developed by Grantee Technical Specialist)
Task 2:	Develop, maintain, and manage statewide recordkeeping and reporting systems
Task 3:	Develop overall monitoring tool (to include all administrative/fiscal, programmatic, and technical elements) for evaluation of Subgrantee implementation
Task 4:	Engage DOE on all questions related to whether policies and procedures are in compliance with 10 CFR 440, 10 CFR 600, OMB Circulars, and Weatherization Program Notices (WPNs)
DOMAIN III:	Establish Grantee-Wide Administrative/Programmatic Training Plan
Task 1:	Assess administrative/programmatic training needs for all levels within the Grantee network
Task 2:	Develop training plans (coordinating the admin/programmatic with the technical needs, as appropriate) targeting specific issues
Task 3:	Evaluate effectiveness of training and re-tool trainings to meet objectives of the Program
Task 4:	Participate in relevant state/regional/national trainings
DOMAIN IV:	Oversee Subgrantee Compliance (Programmatic, Administrative/Fiscal, Technical)
Task 1:	Ensure Subgrantee awards are executed and carried out in accordance with contracts
Task 2:	Define Program staff and Subgrantee roles and expectations
Task 3:	Interpret Program policy and provide direction with regard to client eligibility guidelines, Program priorities, allowable activities, rental

Training and Technical Assistance

Approach to (or description of) training, technical assistance, and monitoring may be the same from year to year...

But, budgets may change:

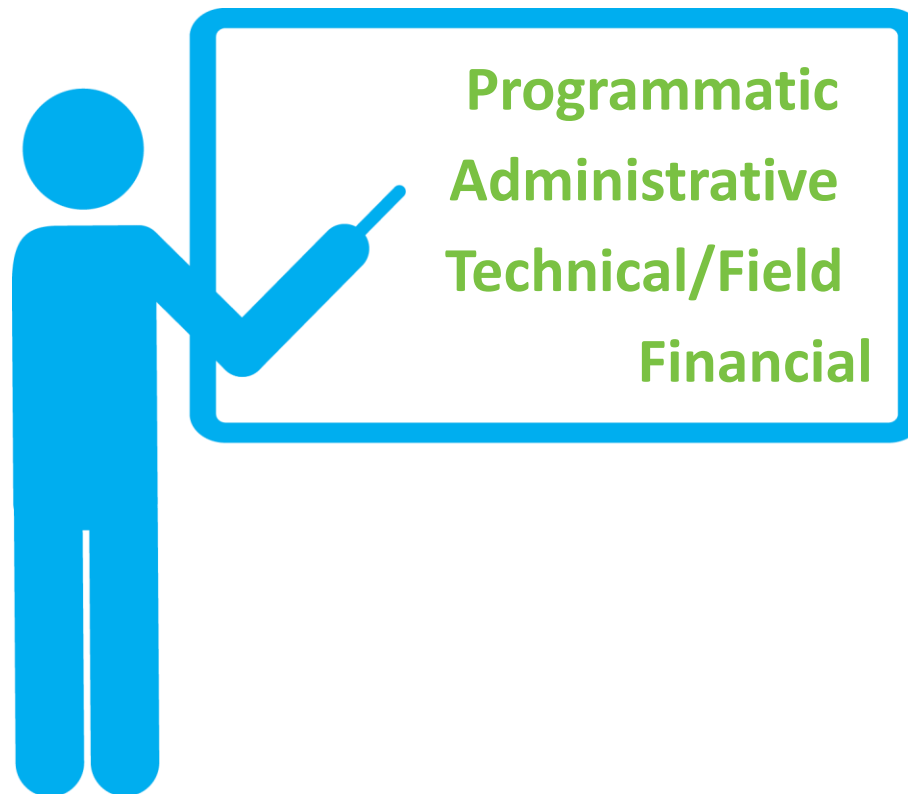


Or, activities may change:



Marks of a Good Training Program

A comprehensive training program will address the following training areas:



Program Managers' Responsibilities

The Program Manager:

- Oversees the solicitation for the training.
- Reviews all respondents' qualifications and interviews candidates.
- Ensures that contracted trainers understand training expectations and goals.
- Monitors the trainings on site as often as possible and/or designates staff to monitor them.

Components of a successful T & TA Plan

Define the workforce:

- How does your operation produce work? Agency staff (grantee and local), independent contractors, a combination?
- Who will you pay to provide training for?

Components of a successful T & TA Plan

Define the workforce.

Identify Grantee Resources for the workforce:

- Will the Grantee provide training to contractors or only direct employees?
- Will the Grantee allocate the T&TA funds directly to agencies to use as they see fit, or will Grantee determine training needs and arrange to have them met?
- If no training will be provided to contractors, what requirements will be in place to ensure that contractors are adequately skilled?

Components of a successful T & TA Plan

Define the workforce.

Identify Grantee Resources for the workforce.

Define workforce training requirements:

- How often will workers need training?
 - i.e. new hires will require X course within X days of hiring.
 - Experienced workers will need refresher courses X times per year.
- Training needs assessment – based on feedback.

Components of a successful T & TA Plan

Define the workforce.

Identify Grantee Resources for the workforce.

Define workforce training requirements.

Identify Training Providers:

- Which training providers meet the requirements of the QWP?
- How will they work with the Grantee to provide training?
- What trainings will be delivered and when? To whom?

Components of a successful T & TA Plan

Define the workforce.

Identify Grantee Resources for the workforce.

Define workforce training requirements.

Identify Training Providers.

Identify Technical Assistance Resources –What will trainers train to?

- Field Standards
- Field Guides
- Audit Tools
- Policies and Procedures Manuals

Components of a successful T & TA Plan

- **Define the workforce. – Who will you train?**
- **Identify Grantee Resources for the workforce. – Funding mechanism, what you'll provide.**
- **Define workforce training requirements. – Training Needs Assessment & Program Requirements**
- **Identify Training Providers. – Who will train them?**
- **Identify Technical Assistance Resources. – What will they train to?**

Training Plan

Beginning with Program Year 2015, 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 Plan, cont.

Grantees must provide a training plan that provides:

- Analysis of training needs within the Grantee's program.
- A description of how the Grantee will ensure 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.*

Training Plan – Description & Milestones

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 as part of the submission:

- How does the Grantee's 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?
 - How is training being planned and targeted to ensure maintenance of these credentials?
- What training will the Grantee provide for Subgrantee staff? Is attendance mandatory? What are the ramifications for non-compliance?

Training Plan – Key Questions to Ask

- Does the Grantee require any certification or training of Subgrantee staff **prior** to hire or by a specific date from date of hire?
- How does the Grantee plan reflect industry-wide initiatives and future program requirements (e.g., certifications, health and safety implementation, etc.)?
- How does the Grantee compare its Subgrantees on **effectiveness and energy savings achieved**?
 - How are these comparisons used in the **development of T&TA activities** and priorities?

Summary

- Critical that Grantees review 15-4 as they approach building the T&TA Plan
- NASCSP may be a source for “sample” plans to help new managers in building a plan
- If in doubt, ask your Project Officer about level of detail necessary