



**NASCSP Winter Training Conference**  
**WAP Orientation and State Manager's Training**  
**February 24 – 25, 2020**

**Monday, February 24****8:00 a.m. – 8:30 a.m.****Continental Breakfast and Joint Welcome****8:45 a.m. – 10:00 a.m.****Welcome to Weatherization*****Presenters: Erica Burrin, DOE; Cynthia Simonson, SMS***

This introductory session will provide an overview of the WAP, key legislation and regulations, and the roles and responsibilities of the Grantee and network partners. Resources for professionals new to the weatherization program will be shared, including the Program Manager Toolkit.

**10:00 – 10:15 a.m.****Break****10:15 a.m. – 12:30 p.m.****Plan Preparation and Submission*****Presenters: Erica Burrin, DOE; Cynthia Simonson and Susan Gardner Zartman, SMS***

What is needed in a strong Annual Plan? An overview of required plan elements, lessons learned from Grantees in addressing these requirements, and templates to assist with the planning process will be shared. PAGE navigation will also be demonstrated.

**12:30 p.m. – 1:45 p.m.****Lunch (on your own)****1:45 p.m. – 3:00 p.m.****Building a Strong Program – Technical Management and the ACSI*****Presenters: Erica Burrin and Derek Schroeder, DOE***

DOE will provide a brief overview of the technical management areas and important considerations for work quality, with an emphasis on energy audits. The session will also include a discussion of the American Customer Satisfaction Index (ACSI) survey process and how Grantees can use the ACSI as a tool for building their program.

**3:00 p.m. – 3:15 p.m.****Break****3:15 p.m. – 4:30 p.m.****Q&A with DOE*****Presenters: Erica Burrin and Derek Schroeder, DOE; Cynthia Simonson and Susan Gardner Zartman, SMS***

Time will be reserved for small group discussion, a review of the day's materials and online resources and answering your questions.

**4:30 p.m. – 5:00 p.m.****Wrap up and Evaluations**

## Tuesday, February 25

8:00 a.m. – 8:30 a.m.

### Continental Breakfast

8:45 – 10:00 a.m.

### Training and Technical Assistance – Planning and Resources

**Presenter: Amy Klusmeier and Andrea Schroer, NASCSP**

How do you assess training needs in your WAP network? This session will take a deeper dive into successful strategies for developing a T&TA Plan. Participants will also provide feedback on new T&TA resources currently in development.

10:00 – 10:15 a.m.

### Break

10:15 a.m. – 12:30 p.m.

### Energy Audits for New Program Managers

**Presenter: Derek Schroeder, DOE**

Energy Audits are a critical tool for ensuring that WAP is maximizing the savings and services provided to eligible households. This session will focus on what a new state manager needs to know about audits; for example, how to interpret the audit reports, common errors to look for when monitoring, and navigating the audit approval process.

12:30 p.m. – 1:30 p.m.

### Lunch

1:45 p.m. – 3:00 p.m.

### Round Robin Discussions

Following a brief presentation by our National Partners at CAPLAW, participants will engage in peer-to-peer learning during this rotating round of small-group discussions. Topics will include:

- Tools for Budgeting and Production Tracking – Andrea Schroer, NASCSP
- Administrative and Fiscal Monitoring – Robert Garber
- Technical Monitoring – Matthew Himmelein
- Leveraging – Kathryn Maddux & Meg Power, CAP
- Communicating Impact – Eric Behna, NASCSP
- ASHRAE Q&A – Paul Francisco, University of Illinois
- DOE/SMS Q&A – Derek Schroeder
- Admin Training & Partnerships with National Labs- Juliana Williams, NREL

3:00 p.m. – 3:15 p.m.

### Break

3:15 p.m. – 4:30 p.m.

### Round Robin Discussions Continued

4:30 p.m. – 5:00 p.m.

### Wrap Up, Resources and Evaluations

# NASCSP Winter Training Conference

## Core Conference

February 26-28, 2020

### Wednesday, February 26

8:00am- 8:30am **Breakfast**

8:30am – 9:15 am **Conference Opening | Presenters: Willie Fobbs, Jenae Bjelland**

9:15am- 10:15am **Federal Partner Update | Presenters: Daniel Simmons, DOE**

10:15 – 10:45 am **Networking Break**

10:45am- 11:30am **General Session – National Expert on Poverty | Presenter: Elizabeth Kneebone**

11:30am – 1:00pm **Lunch (on your own)**

1:00pm-3:00pm **NASCSP WAP Member Planning and Action Session**

**Presenters: Amy Klusmeier, Bruce Hagen**

Participate in shaping NASCSP's WAP priorities during this member-only session! You will also have opportunities to build relationships with other state managers and engage in peer discussions on current WAP topics and trends. A summary of the NACSP strategic plan will be shared.

**Weatherization and Health Partnerships | Facilitator: Kathryn Maddux, CAP Presenters: Dr. Bruce Tonn, ThreeCubed; Dr. Ankoor Shah, DC Dept. of Health; Beth Parsons, Tennessee Valley Authority**

Innovative partnerships between WAP and healthcare, and WAP and public health institutions, could fund additional WAP program measures and may help avoid deferrals. Most importantly, they may greatly improve the health of many that we serve. Hear from Dr. Ankoor Shah, Deputy Director for Programs and Policy, Community Health Administration, DC Department of Health, regarding the role the public health sector can play in healthier homes and from Dr. Bruce Tonn, Co-Founder and President at ThreeCubed regarding the impact of several projects, including one underway in Tennessee, Knoxville-Knox County Community Action Committee. Beth Parsons, Program Manager, Tennessee Valley Authority, will also discuss TVA's new Home UpLift Initiative with ThreeCubed and the reasons the utility invests in its customers' energy efficiency and how weatherization might improve their health.

3:00 – 3:30 pm **Networking Break**

3:30pm – 4:45pm **Technical Issues & Peer Exchange in WAP | Presenters: Mimi Burbage, Bruce Hagen, Steve Divan, Geoff Wilcox, Jonathan Ballew**

Representatives from Energy OutWest will share models for peer exchange in the WAP network and lead a panel discussion on hot-topic technical issues in weatherization. Bring your questions to this interactive session!

## Thursday, February 27

- 8:00 – 8:30 am**      **Breakfast | DOE Project Officer Discussions**
- 8:30- 9:30 am**      **National Partner Update**
- 9:30 – 10:00am**      **Networking Break**
- 10:00 – 11:45am**      **Breaking Down Barriers, Maximizing Impact | Presenters: Sisifo Taatiti, Utah; Matt Fitzgerald, Virginia; Jose Acosta Silva, Puerto Rico; Andrew Etue, Washington**  
This joint plenary session will feature state offices managing multiple federal programs including WAP, CSBG, and LIHEAP. NASCSP members will share innovative approaches to data coordination and sharing, streamlining monitoring and training efforts, and harmonizing rules and reporting. Presentations will be followed by a moderated panel with opportunities for questions from session attendees.
- 11:45am - 1:00pm**      **Awards Lunch**
- 1:15pm - 2:30pm**      **Federal Perspective 1 | Presenters: Erica Burrin, Derek Schroeder, and Felix Vasquez, DOE**  
U.S. Department of Energy staff will discuss program and policy updates and review guidance for the upcoming program year.
- 2:30pm - 3:00pm**      **Networking Break**
- 3:00pm- 5:15pm**      **Federal Perspective 2 | Presenters: Erica Burrin, Derek Schroeder, and Pam Mendelson, DOE; Juliana Williams, NREL; Paul Francisco, University of Illinois; Mark Ternes, ORNL; Kathryn Maddux, CAP**  
U.S. Department of Energy staff will discuss program and policy updates and review guidance for the upcoming program year.

## Friday, February 28

- 8:00 – 8:30 am**      **Breakfast**
- 8:30am- 9:45am**      **WAP Session – Workforce Development | Presenters: NASCSP; Deanna McCord, Kentucky, Nany Palmer, Virginia, Matt Bandstra, NAWB**  
Recent surveys have shown that workforce development is one of the primary challenges facing states and local WAP providers. Results from a 2019 NASCSP survey will be shared, along with examples of innovative approaches to workforce development from State WAP Offices. A representative from the National Association of Workforce Boards (NAWB) will also be joining the panel.

- 10:15am-11:30am**      **WAP Session – LIHEAP Coordination | Presenters: Cassandra Lovejoy, NEADA; Lynn Chamberlin, Nebraska; Trent Williams, Alabama**  
Seamless blending of LIHEAP and DOE funds is an important factor in managing a successful WAP. Lessons learned in coordinating with LIHEAP will be featured from two State WAP Managers, as well as a conversation on current issues facing the national LIHEAP program lead by a representative of the National Energy Assistance Directors Association (NEADA).
- 11:45am-12:15pm**      **Conference Wrap Up, Report Outs, and Raffle**

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