

<input type="checkbox"/>	Ensure expenditures are allowable (p. 17)
	<ul style="list-style-type: none"> <li>• T&amp;TA for any Grantee or Subgrantee (including monitoring and QCI training)</li> <li>• Providing information concerning conservation practices to occupants of eligible dwelling units (client education)</li> <li>• Evaluation of Program outcomes</li> <li>• Participation, travel, logistics of training activities and events</li> <li>• Grantee purchases of vehicles or equipment, which are directly related to specific T&amp;TA activities, such as monitoring, etc. (T&amp;TA funds shall <b>not</b> be used to purchase vehicles or equipment for Subgrantees to perform Weatherization services.)</li> </ul>

<input type="checkbox"/>	Plan indicates methods used to provide T&TA to Subgrantees and to ensure quality of work and adequate financial management control at Subgrantee level (p. 43)
<input type="checkbox"/>	Plan contains a description of the activities to be undertaken during the PY with funds budgeted for training, technical assistance, and monitoring on SF-424A under either T&TA or Administrative cost categories. (p. 43)
<input type="checkbox"/>	If T&TA funds will be used to train contractors, a training retention agreement is secured and requires that contractors work in the Program for a specific amount of time. (p. 43)

Describe training plan and milestones necessary to ensure plan is on pace to be accomplished. At a minimum address: (p.44)	
<input type="checkbox"/>	Percentages for overall trainings (comprehensive & specific trainings as a percentage) as well as the planned breakdown of T&TA training budget across job types.
<input type="checkbox"/>	Feedback from DOE PO monitoring visits, internal state audits, field monitoring, etc.
<input type="checkbox"/>	How workforce credentials are maintained and tracked
<input type="checkbox"/>	What training the Grantee provides for Subgrantee staff, whether attendance is mandatory, and the ramifications for non-compliance
<input type="checkbox"/>	A statement that staff may not function unsupervised until training and certification requirements are met
<input type="checkbox"/>	How the Grantee plan reflects industry-wide initiatives and future program requirements (e.g., certifications, health and safety implementation, etc.)
<input type="checkbox"/>	How the Grantees partner with the statewide home performance industry on training issues, if applicable
<input type="checkbox"/>	How the Grantee evaluates and compares the effectiveness and the energy savings achieved by its Subgrantees in comparable structures and how these comparisons are used in the development of T&TA activities and priorities
<input type="checkbox"/>	An assessment of the Grantee and the anticipated T&TA activities necessary to ensure Grantee effectiveness in administering and implementing the grant
<input type="checkbox"/>	What training activities are planned to execute the Grantee Health and Safety Plan
<input type="checkbox"/>	How the Grantee approaches client education

**Interstate Renewable Energy Council (IREC) Report: Accredited Weatherization Training Centers - Last update: Feb 3, 2020**

Training Organization	Primary Location	EA	QCI	RIT	CL	
Association for Energy Affordability, Inc. (AEA)	Bronx, NY	x	x	x	x	hepininstall@aea.us.org
Building Performance Center	Bellingham, WA	x	x			ross_quigley@oppco.org
CHP Energy Solutions, LLC	Christiansburg, VA	x	x	x	x	awoodruff@chpc2.org
COAD Ohio Weatherization Training Center	Athens, OH	x	x	x	x	tcombs@coadinc.org
Contractors-Laborers Training Fund	Omaha, NE			x	x	ronald@laborers1140.org
Energy Coordinating Agency of Philadelphia, Inc.	Philadelphia, PA	x	x	x		walty@ecasavesenergy.org
Everblue	Huntersville, NC	x	x			sidb@everbluetraining.com
FSL Southwest Building Science Training Center	Phoenix, AZ	x	x	x	x	kmartin@fsl.org
INCAA	Indianapolis, IN	x	x	x	x	mdauby@incap.org
Indoor Climate Research & Training, University of IL	Champaign, IL	x	x			lshupe@illinois.edu
Montana Weatherization Training Center	Bozeman, MT	x	x	x	x	chris.dorsi@montana.edu
National Sustainable Structures Center	Williamsport, PA	x	x	x	x	aad1@pct.edu
New York State Weatherization Directors Association (NYSWDA)	Guilderland, NY	x	x		x	astone@nyswda.org
Oklahoma Weatherization Training Center	Edmond, OK	x	x	x	x	michaeljones@okacaa.org
Oregon Training Institute	Salem, OR	x	x			kcentner@warmandsafenow.com
Residential Energy Efficiency – Training Initiatives	Frankfort, KY	x	x	x	x	dmccord@kyhousing.org
Santa Fe Community College	Santa Fe, NM	x	x	x	x	amanda.hatherly@sfcc.edu
SMOC / Green Jobs Academy	Framingham, MA	x	x	x	x	gokeefe@smoc.org
Southface Energy Institute	Atlanta, GA	x	x	x	x	amithavayani@southface.org
State of Utah	Clearfield, UT		x			wthompson@utah.gov
Wisconsin Energy Conservation Corporation - Slipstream	Madison, WI	x	x	x	x	sharmelink@slipstreaminc.org

## INTRODUCTION

Following the 2019 ACSI survey DOE, working with contractors and WAP partners, undertook a systematic effort to analyze the root causes of T&TA issues and develop solutions to assist Grantees and Training Centers. A series of training resources and tools were created with the goal of easing the administrative burden for WAP Grantees, improving consistency of the requests for T&TA across the network, and ensuring trainings are customized to meet Grantee-specific needs. This resource is designed to enhance and improve Grantees' requests for training, with the examples provided focusing on a single training (versus a multi-training contract). The goal is that Grantees include enough accurate information in requests to ensure they receive comparable proposals from training providers and ultimately are able to select the most appropriate training for their needs.

### Scope of Work

This toolkit focuses on the scope of work, which is a section of your purchasing request document that describes what type of training you want, when, and who will attend. A detailed scope of work is critical in getting the training and technical assistance your WAP network needs. This template is intended to provide a starting point for drafting a scope of work that can be inserted into a request for services, proposal or other purchasing document. Regardless of the type of procurement or purchase you are performing, it is critical to include the details as described in the scope of work elements below.

### Other Considerations

In addition to the scope of work, below are a few other considerations for purchasing T&TA services.

**Response Timeframe.** To improve the responses to your RFP or purchasing request, allow enough time for training providers to prepare a proposal. For a single training request like the samples below a minimum of one month is recommended as a response timeframe (the proposal due date is one month from the date of publication/receipt).

**Timing of Training Delivery.** Training center availability varies depending on factors such as other T&TA commitments, staffing levels, state and national conferences, etc. A survey conducted of training centers in June 2019 showed that on average training centers book T&TA activities 3 months in advance. It's important to be realistic with your requests for the timing of the training delivery. A sample timeline for solicitation and delivery of a single, comprehensive training:

- February 1 – Request for Proposals published/quotes requested
- Early March – Proposals due
- Mid-March – Training Provider Selected
- Late June – Training Delivered

Note that including training needs analysis and/or customization of the training curriculum will likely extend this timeline.

**Grantee-specific WAP Background.** Your RFP or request for quotes should include background on your program that will influence the content of your training. For example, housing types served (predominately single family, under 20% multi-family, etc.) typical housing characteristics (slab on grade, conditioned basements, etc.) , what fuel types, heating/cooling systems and water heater types are most prevalent in your service territories, how many subgrantees comprise your network, etc. This information is typically in a stand-alone section of the RFP and is an important supplement to the scope of work.

## SCOPE OF WORK ELEMENTS

The Scope of Work contains detailed specifications describing the services you expect will be provided by the contractor. Training providers will use this information to develop a project proposal and budget, and the Scope of Work serves as the contract deliverables and timeline for the WAP Grantee. Below are considerations for drafting your specifications and Scope of Work.

<b>Scope of Work Element</b>	<b>Sample 1 - Beginning Energy Auditor Training Course</b>	<b>Sample 2 - Advanced Energy Auditor Training for Specific Needs</b>
<b>1. Type of Training &amp; Audience</b> Describe the type of training needed, the Job Tasks that will be included in the curriculum, and who will attend. It is important to provide detail on the attendee levels of experience and roles in the WAP network (i.e., beginner/intermediate/advanced or years of service; subgrantees and/or grantees, etc.)	Grantee is requesting introductory training for recently hired Weatherization Assistance Program (WAP) staff, covering the full <a href="#">NREL Job Task Analysis</a> for Single-Family Energy Auditor. Training will be attended by 10 to 15 subgrantee and grantee staff that have been hired by WAP within the past two years, some with experience providing residential retrofits. All participants meet the prerequisites to sit for the BPI Energy Auditor Exam.	Grantee is requesting advanced training for experienced Weatherization Assistance Program staff, aligned with the <a href="#">NREL Job Task Analysis</a> for Single-Family Energy Auditor. Training will be attended by 10 to 15 subgrantee and grantee staff that hold the BPI Energy Auditor credential and have at least one year of experience performing energy audits.
<b>2. Standards</b> Describe the state and federal standards that will be the basis of the training	All training content must meet the following standards and protocols: 10 CFR 400; 2 CFR 200; U.S. Department of Energy Grant Guidance; State of ____ Weatherization Program and Policy Manual; State of ____ Weatherization Technical Field Guide ; NEAT/MHEA 8.9 User Guide and related state-specific data collection forms (see attachments).	
<b>3. Experience and Certifications</b> Requirements of the trainer (IREC Accreditation, certifications, experience)	Training must be provided by an IREC-accredited training provider. In addition, the instructor must hold active BPI EA and QCI certifications. At least ten years of experience training in the WAP network preferred.	Training must be provided by an IREC-accredited training provider. In addition, the instructor must hold active BPI EA and QCI certifications. Energy Auditing experience and expertise in NEAT/MHEA for single family homes required. At least ten years of experience training in the WAP network preferred.
<b>4. Needs Assessment</b> Two scenarios here: detail available info from state needs assessment (already completed) or include specifications for what the proposer will be responsible for (e.g., surveying subgrantees in advance of curriculum development)	This training is being planned due to turnover of multiple staff in the WAP network. Contractor may choose to do a survey or other information gathering from the participants prior to the training (not required).	Grantee quality assurance monitoring has identified a specific need for the following training: combustion safety testing; improving accuracy of data collection and entry in NEAT/MHEA; duct leakage testing. Additional details from a grantee-completed needs assessment will be shared with the selected contractor at least 3 weeks prior to the training date.

T&TA Scope of Work Template – Grantee, single comprehensive training model

<p><b>5. Training Delivery</b> Describe the methods used to deliver training. Will you require onsite/in-person training, online/remote training, or a mixture of both? When ideally would you like the training to occur?</p>	<p>Training provider will conduct preliminary screening (preferably via on-line/distance learning models) to ensure attendees are ready to attend in-person training (e.g., minimum vocabulary and building science background knowledge, basic mathematics). Core training will be conducted in-person and include a mixture of classroom sessions and hands-on field work. Ideally the training will be completed by the end of July 2020.</p>	<p>Training will be conducted in-person and include a mixture of classroom sessions and hands-on field work. Participants will be required to perform elements of the audit and collect data at a home. Ideally the training will be completed by the end of July 2020.</p>
<p><b>6. Frequency and Length</b> Describe the anticipated number of hours or days and whether the training will be held one-time statewide, repeated at several locations, etc.</p>	<p>Training will be held one time and all participants from throughout the state will attend. Grantee anticipates a minimum of five (5) full days of training will be needed, but not more than ten (10) full days.</p>	<p>Training will be held one time and all participants from throughout the state will attend. Grantee anticipates a maximum of five (5) full days of training.</p>
<p><b>7. Location</b> Ideally the training location minimizes travel for your participants. The training provider needs as much detail as possible to prepare an accurate travel expense estimate. Where will the training occur, will you require the trainer travel to your state, or are you open to having your staff travel to a training provider if the facilities are more suitable?</p>	<p>Training will be held in a location that minimizes travel for all participants, as feasible. For example, [city] is centrally located with access to a regional airport and has multiple hotels with a conference rooms that would be suitable. Any location proposed by Contractor is subject to Grantee approval. Contractor will be required to travel to the training location.</p>	
<p><b>8. Curriculum Development &amp; Training Preparation</b> Having a customized curriculum is one of the most important factors in ensuring the training meets your network's needs. Curriculum development is time-consuming and expensive, and it is critical the training provider understands the amount of work that is needed to develop and prepare for the training. Include as much detail as possible on the estimated need and build this into the pricing, possibly as a line item.</p>	<p>Contractor may use existing IREC-accredited curriculum for Energy Auditor training, provided it is customized for our state-specific standards, policies, and protocols. Grantee will review and approve curriculum prior to training on a mutually agreed-upon schedule.</p>	<p>Contractor may use existing IREC-accredited curriculum for Energy Auditor training, provided it is customized for our state-specific standards, policies, and protocols. Grantee anticipates sections or modules of existing curricula may be relevant (combustion safety and duct leakage testing), but that portions of the training content will need to be created specifically for this audience after reviewing needs assessment, completed audits, and other background provided to Contractor (improving data collection). Grantee will review and approve</p>

		curriculum prior to training on a mutually agreed-upon schedule with Contractor.
<b>9. Evaluation of Learning</b> Trainings should all require some form of end-of-course knowledge check, test or assessment to determine whether learning objectives have been achieved. This is separate from any certification exams. Including this requirement, and ensuring that you have access to the results, will assist in improved T&TA planning over time.	Training provider will deliver an end-of-course assessment aligned with the learning objectives of the course and make the results available to the Grantee.	
<b>10. Certification Testing &amp; CEUs</b> If certification is a goal of the training, will contractor be responsible for facilitating the proctoring of BPI exams or preparing attendees to take a certification exam? If procuring CEUs for your network is a goal of the training, specify who will be responsible for securing CEUs for the training.	At the conclusion of the training participants are expected to have obtained the knowledge needed to pass the BPI EA written and field exams.	Participants will be required to complete a contractor-developed field exercise and exam at the conclusion of the training. Results will be made available to the Grantee.  Contractor will be required to secure BPI CEUs for the training and submit all required documentation to BPI.
<b>11. End of Course Evaluations</b> These evaluations are an opportunity for the learners to share their experiences and perceived strengths and weaknesses of the provided training to inform future planning, similar to the conference session evaluations common at most training conferences.	Training provider will share their end of course evaluation instrument for Grantee review and revision. Training provider will share consolidated responses with Grantee within 30 days of completion of training.	<i>[Grantee will distribute and collate an end of course evaluation. Not included in contract language.]</i>
<b>12. Training Retention Activities</b> Studies have shown that without retention activities, participants lose __ % of what they learn just __ weeks after the training. Specify how often training retention activities should occur and the method for determining whether participants are retaining the information.	No training retention activities are required for this training. Participants will take the written and field EA exam shortly after this training.	Training retention activities are required three weeks and six weeks following completion of the training. The retention activities will be designed and developed by the contractor and delivered remotely/online. Grantee will review and approve training retention activities on a mutually agreed-upon schedule with Contractor.
<b>13. Logistics</b>	Grantee will coordinate with Contractor to identify a location and venue for the training and will arrange	Grantee will coordinate with Contractor to identify a location and venue for the training and will arrange

T&TA Scope of Work Template – Grantee, single comprehensive training model

<p>The training environment is an important factor in the success of the training. Describe the contractor's responsibilities for securing training facilities, copies of training materials, test sites, hotels, etc. – also detail the technology and equipment requirements.</p> <p>Note: If the training is an IREC-accredited training program, the provider will have policies in place to ensure a suitable training environment.</p>	<p>all reservations for lodging, training room, and meals (lunch will be provided). Contractor will be responsible for working with venue staff for training-specific needs such as AV and room setup, and any logistical issues that arise during the training. Contractor is encouraged to propose alternatives, as feasible, for hands-on field portion of the training. Grantee will assist Contractor in securing a home for the field work portion as needed.</p>	<p>all reservations for lodging, training room and meals (lunch will be provided). Grantee will have a staff person on site to provide assistance with logistics; Grantee staff will serve as liaison with venue staff. Contractor is encouraged to propose alternatives, as feasible, for hands-on field work. Grantee will assist Contractor in securing a home for the field work portion as needed.</p>
<p><b>14. Administration</b></p> <p>Registration, reporting and participant evaluations of the trainer – define the expectations for who will be responsible.</p>	<p>Grantee will be responsible for participant registration and will provide a list of registrants to the contractor at least one month prior to the training. Contractor is responsible for developing and administering evaluations (subject to approval of Grantee), tracking attendance, and any other on-site administrative needs. Contractor will provide Grantee with a training completion report that includes attendance details for each day of the training, evaluations completed by the participants (unedited), an analysis of participant performance, test/quiz results, and any recommendations for additional T&amp;TA or program improvements within 30 business days of completion of the training.</p>	