



2020

WINTER

Training Conference

**“Breaking Barriers,
Maximizing Impact”**

February 24-28

T&TA Planning and Resources

National Association for State Community Services Programs | www.nascsp.org



NASCSPP provides research, analysis, training and technical assistance to **State CSBG and WAP grantees**, Community Action Agencies and subgrantees, and State Associations in order to increase their capacity to prevent and reduce poverty and build economic and energy security.



<https://nascsp.org/>

Introductions

Today's Presenters:

Amy Klusmeier, WAP Director
aklusmeier@nascsp.org

Andrea Schroer, WAP Program Manager
aschroer@nascsp.org

Our Partners:

Kelly Cutchin, SMS



Anna Sullivan and
Laure-Jeanne Davignon

Agenda

- Introduction
 - Benefits and challenges of T&TA planning
- DOE Guidance
 - Flexibility with accredited programs
- Assessing Training Needs
- Planning to Meet Training Needs
- Closing and Evaluations



WAP Purpose

Weatherization Assistance Program Mission

“To reduce energy costs for low-income families, particularly for the elderly, people with disabilities, and children, by improving the energy efficiency of their homes while ensuring their health and safety.”

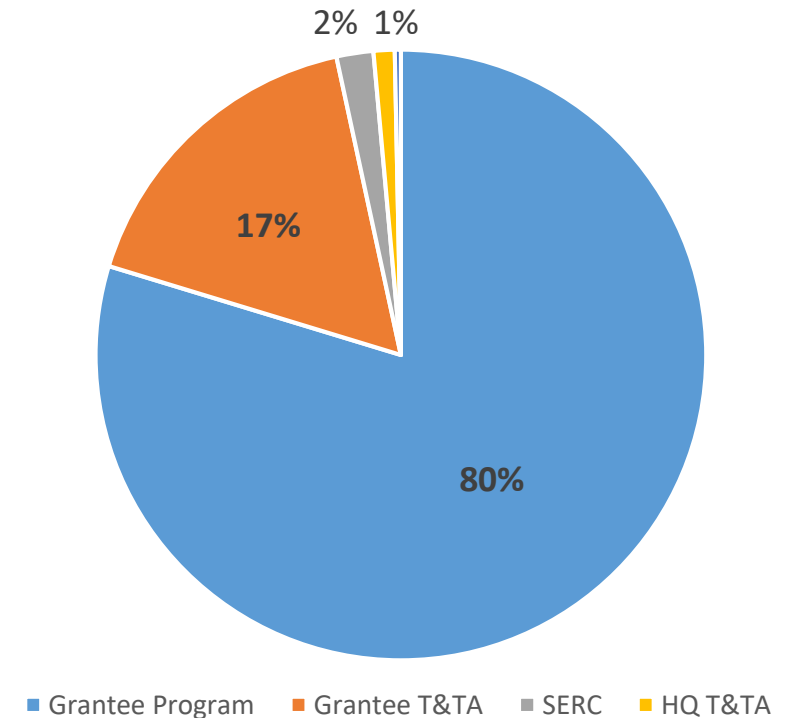
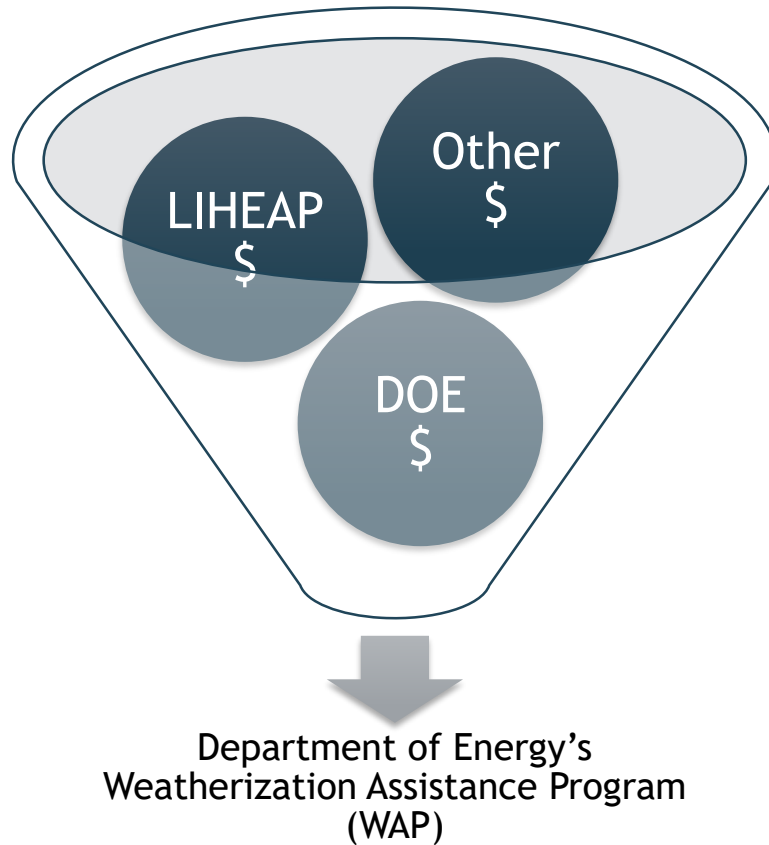
WAP IS A:

- formula grant
- program with a 40+ year record of success
- whole-house retrofit program
- driver of innovation and technology development
- skilled and certified workforce

2020 Allocations

DOE - \$308.5 million

Total WAP Allocation to Grantees:
\$249,232,500 Program
+ \$52,867,500 T&TA
= \$302,100,000



Why Train?

Benefits of Training and Technical Assistance

- Improve work quality and safety
- Be proactive – reduce monitoring findings
- Ensure proper use of funds
- Achieve program mission – cost savings for households
- Worker satisfaction and retention
- Succession planning and organizational sustainability
- Customer satisfaction

What are some challenges in T&TA planning and implementation?

- Not enough funds
- Lack of time to designate funds
- No accredited training center in my region
- No time for training
- Stakeholders do not understand the importance of quality training
- Stakeholders do not understand the cost
- Staff turnover

Key Rules and Guidance

Regulations – 10 CFR 440

10 CFR 440.21 (b)(7) Each application shall include a training and technical assistance plan which shall indicate how funds for training and technical assistance will be used.

10 CFR 440.23 (e) The Secretary may reserve from the funds appropriated for any fiscal year an amount not to exceed 20 percent to provide, directly or indirectly, training and technical assistance to any grantee or subgrantee. Such training and technical assistance may include providing information concerning conservation practices to occupants of eligible dwelling units.

Grant Guidance – WPN 20-1 Application Instructions

Applicants shall indicate the methods used to provide T&TA to Subgrantees, and the methods employed to ensure quality of work and adequate financial management control at the Subgrantee level.

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...**The Grantee must determine what constitutes "regular" training...**

Application Instructions (WPN 20-1)

Allowable Uses of DOE T&TA

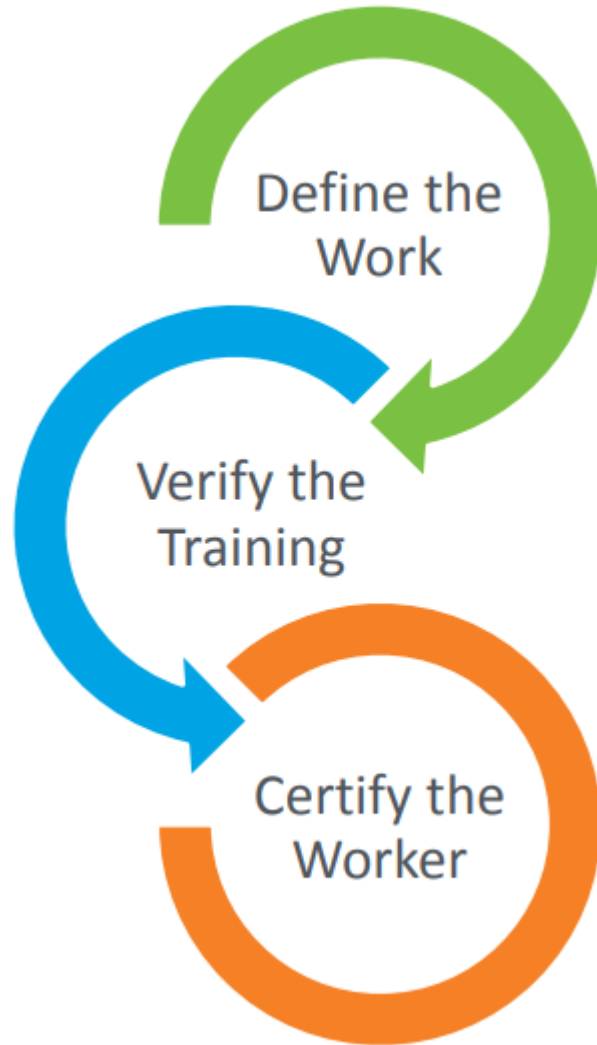
- Costs incurred in the training and technical assistance for any Grantee or Sub-grantee (including monitoring and QCI training).
 - Providing information concerning conservation practices to occupants of eligible dwelling units (client education).
 - Evaluation of Program outcomes.
 - Participation, travel, logistics of training activities and events.
-

Application Instructions (WPN 20-1)

Allowable Uses of DOE T&TA

- Grantee purchases of vehicles or equipment, which are directly related to specific training and technical assistance activities, such as monitoring, etc.
 - T&TA funds **shall not be used to purchase vehicles or equipment for Subgrantees** to perform Weatherization services. The cost of these vehicles or equipment to support the Program **must be charged to the Vehicle/Equipment or Program Operations categories.**

WPN 15-4: Quality Work Plan



Four Primary Sections

- Guidelines and Standards
- Communication
- Inspection and Monitoring
- Training

Published October 2014
Required for PY 2015

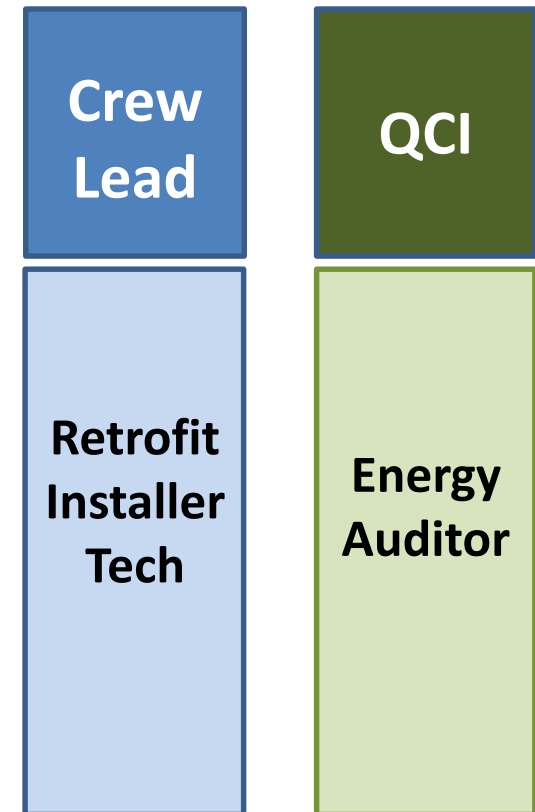
Additional Resources:

[DOE QWP Requirements](#)

[DOE Training Resources](#)

Training and Certifications – [WPN 15-4](#)

- WAP [Memo 34](#)
 - Clarifications regarding Comprehensive (formerly Tier 1) training
 - IREC Training on NASCSP website
- WAP [Memo 36](#)
 - QCI becomes a micro-credential on top of Energy Auditor
- WAP [Memo 50](#)
 - Crew Lead and Retrofit Installer/Technician Job Task Analysis



WAP T&TA Funding Training Categories

Comprehensive *(formerly Tier 1)*

Planned training required on a regular cycle for EA, QCI, RIT, CL workers

Full training program **aligned with JTA** but workers may take **targeted modules** as part of prescribed, broader training schedule

Accredited training provider

Specific *(formerly Tier 2)*

Unplanned or remedial training for EA, QCI, RIT and CL workers to address immediate need

Planned or unplanned training for Program **Administration** professionals

Conferences

No accreditation requirement

WAP Training Categories

Comprehensive *(formerly Tier 1)*

- regularly scheduled car maintenance



Specific *(formerly Tier 2)*

- fixing a blown out tire



Comprehensive Training

Job Task Analysis (JTA)

CREW LEADER		Badge/Task/Skill >>																								
		Work Lead-Safe	Air seal attic floor	Seal and dam high-temp heat sources in attic	Prep attic floor for insulation	Treat attic hatch	Insulate attic floor and pass inspection the 1st time	Insulate the ceiling of a manufactured home	Seal and Insulate Knee Walls	Install dense-pack sidewall insulation	Insulate the walls of a manufactured home	Install weather stripping and sweep set on exterior door	Air seal and insulate walls of a conditioned subspace (basement or crawl space)	Air seal floor above an unconditioned subspace (basement or crawl space)	Insulate the floor above an unconditioned subspace	Insulate the belly of a manufactured home	Install or repair vapor retarder in a subspace	Vent clothes dryer to the exterior	Install ducting for a bath or kitchen range fan	Air seal ducted distribution system	Insulate ducted distribution system	Install window or exterior door	Repair/replace cracked or broken glass	Insulate a water heater tank and the first 6 feet of pipes	Install low-flow faucet aerators or showerhead	Install exterior roof penetration (e.g., roof vents or bath fan termination)
D1	Domain 1: Develop Plan to Execute Scope of Work																									
D1.T1	Task 1: Identify materials and staffing needs.																									
D1.T2	Task 2: Prepare homeowner/occupants for the scope of work.																									
D1.T3	Task 3: Determine readiness of the job site for the scope of work.																									
D1.T4	Task 4: Identify work site safety hazards and inform crew of safety requirements.																									
D2	Domain 2: Prepare and Maintain Job Site																									
D2.T1	Task 1: Locate and verify access to specific work areas.	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
D2.T2	Task 2: Protect interior/exterior of house (e.g. with drop cloths, poly, Tyvek booties, pressurizations).	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
D2.T3	Task 3: Set up tools.	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
D2.T4	Task 4: Set up materials.	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
D2.T5	Task 5: Report out of scope preexisting conditions	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
D3	Domain 3: Implement Scope of Work																									
D3.T1	Task 1: Identify and report potential combustible safety hazards.	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X
D3.T2	Task 2: Install roof penetrations and weatherproofing.																	X	X							X
D3.T3	Task 3: Rough in mechanical ventilation systems.																			X	X					
D3.T4	Task 4: Assist with mechanical systems upgrades.																									
D3.T5	Task 5: Install air sealing measures.		X	X		X			X				X	X							X		X			
D3.T6	Task 6: Install or repair vapor retarders.																X									
D3.T7	Task 7: Install insulation.				X	X	X	X	X	X	X	X			X	X					X					
D3.T8	Task 8: Install windows and doors.																					X				
D3.T9	Task 9: Install baseload measures.																							X	X	
D3.T10	Task 10: Identify and report deviations from scope of work.	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X
D3.T11	Task 11: Clean all debris and work materials from the job site.	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
D4	Domain 4: Manage Project																									

Comprehensive Training

Flexibility with Accredited Training

- The intent of DOE guidance is to ensure workers have access to the training they need in order to do their jobs well
- Comprehensive training can and should be customized to meet the objectives identified in your training needs assessment

Master File V.8.4 - T&TA Approach

The screenshot displays a software interface for configuring training budgets. It is divided into two main sections: 'Percent of overall trainings' and 'Breakdown of T&TA training budget'. The first section contains two input fields: 'Comprehensive Trainings' set to 50.0 and 'Specific Trainings' set to 50.0. The second section contains three input fields: 'Percent of budget allocated to Auditor/QCI trainings' set to 20.0, 'Percent of budget allocated to Crew/Installer trainings' set to 10.0, and 'Percent of budget allocated to Management/Financial trainings' set to 10.0. The entire interface is enclosed in a light gray border with a small help icon in the top left corner.

Category	Value
Comprehensive Trainings	50.0
Specific Trainings	50.0
Percent of budget allocated to Auditor/QCI trainings	20.0
Percent of budget allocated to Crew/Installer trainings	10.0
Percent of budget allocated to Management/Financial trainings	10.0

- Breakdown by percentage of planned Comprehensive and Specific Trainings
- Percentage of the T&TA training budget by job category
 - Auditor/QCI
 - Crew/Installer
 - Management / Financial

Assessing T&TA Needs

Allocating T&TA Funds

NASCSP conducted a Peer-to-Peer survey in January 2020

	% Total Funds Allocated to T&TA	Amount of total T&TA allocated to Subgrantees
Low	3%	33%
Average	11%	64%
High	17%	100%

Do you plan to adjust percentages in 2020?

- *Yes – 3 states (2 increasing and 1 decreasing)*
- *Maybe – 7 states (5 likely increasing percentages)*
- *No – 7 States*

Data Collection

What type of data
and how do you
collect it?



Data Collection Methods

- Self assessments and performance reports
- Training and certification records
- Focus groups or committees
- Individual interviews
- Surveys
- Monitoring and observation
- Energy savings evaluations

Assessing Training Needs

Small Group Discussion Exercise:

Training Initiated or Identified by	Training Description	Provided by?
Onsite Monitoring		
Subgrantee Request		
Contractor Request		
Customer Complaint		
Program Requirement		

T&TA Planning & Resources

Planning Considerations

- Compliance with Guidance
- Short-term and long-term planning
 - Allocating funds
 - Procurement methods
 - Planning calendars – [DOE presentation](#)
- Contractor training and retention agreements
- Training center availability
- Purchasing – developing a scope of work

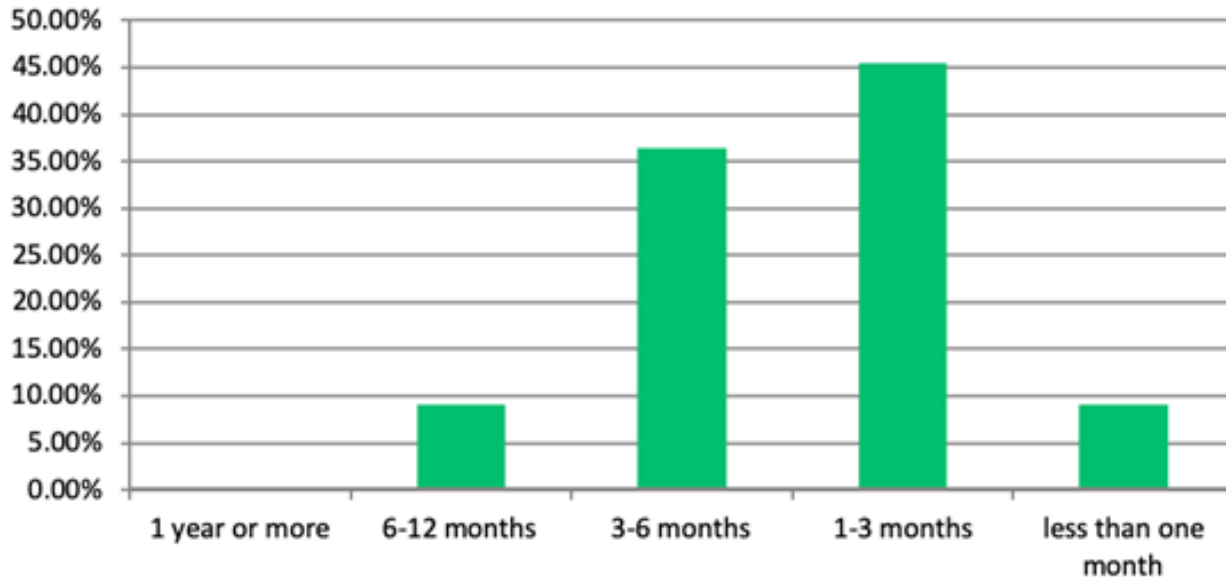
Contractor Training and Retention Agreements

See [WPN 10-1 Attachments](#)

1. KHRC will provide DOE T&TA funds to cover the cost of Contractor's participation in the Training Course, limited to the following:
 - a. The Training Course registration fee, including any course materials;
 - b. Reasonable travel costs in accordance with DOE standards;
 - c. **[INSERT OTHER COSTS, IF APPLICABLE]**
2. Contractor shall satisfactorily complete the Training Course and any examinations required thereto;
3. Contractor shall remain actively employed or actively participate in K-WAP weatherization inspections for a period of no less than twelve (12) months following completion of the Training Course.

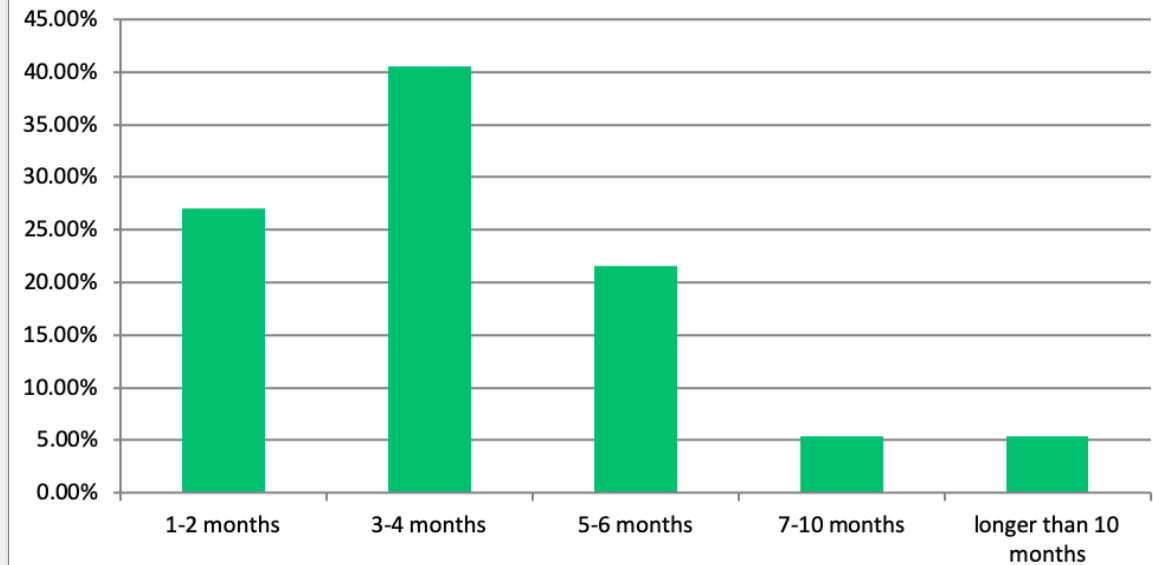
Training Center Availability

How long is your training schedule generally booked in advance?



Grantee Procurement Timelines

How long do required procurement procedures usually take from initial request for proposal to training delivery?



New Resources – Training Issues Action Planning

In response to ACSI Survey Results and network feedback, DOE is working with partners to develop resources for the WAP network.

- Primer on Requirements of Accredited Training Programs
- Request for Proposal Toolkit
- Training Needs Analysis Toolkit

Purchase Planning - Scope of Work

- Regardless of purchasing method, a detailed scope of work is critical in getting the training your network needs
 - See handout for examples

IREC Accredited Providers:

<https://irecusa.org/credentialing/credential-holders/>

IREC Accreditation Programs:

<https://irecusa.org/credentialing/accreditation/>

Home Energy Professional Credential	Accredited Training Providers
Retrofit Installer Technician	15
Crew Lead	15
Energy Auditor	19
Quality Control Inspector	20

DOE Planning & Reporting Template

<https://www.energy.gov/eere/wipo/wap-management-training-resources>



TRAINING & TECHNICAL ASSISTANCE (T&TA) PLANNING & REPORTING TEMPLATE

Reviews a new optional template DOE developed to assist Weatherization Assistance Program Grantees to plan their annual T&TA plan. [Download the template.](#)

Badges Toolkit – Retrofit Installer

- WAP Memo 50: <https://www.energy.gov/sites/prod/files/2019/05/f63/wap-memo-050.pdf>

NREL
NATIONAL RENEWABLE ENERGY LABORATORY

Standard Work Specifications Tool

Home | About | Help | Contact Us | My Account | Sign In

Search All Topics Go

Health & Safety | Air Sealing | Insulation | Heating & Cooling | Ventilation | Baseload

Standard Work Specifications for Home Energy Upgrades

Standard Work Specifications (SWS) are a major component of the Guidelines for Home Energy Professionals project and define the minimum requirements to ensure that the work performed during home energy upgrades is effective, durable, and safe. The SWS can be used as an industry guide for workers, training instructors, homeowners, and program administrators involved in the home performance industry.

Intro
Read an introduction to the Standard Work Specifications


Maintenance
Learn how the Standard Work Specifications are maintained

Guidelines for Home Energy Professionals Project Resources
Guidelines for Home Energy Professionals Project Resources






- [Find Accredited Training](#)
- [Get Certified](#)
- [Meet the Quality Work Plan Requirements](#)

News & Updates
May 21, 2018
Creating a Field Guide Using the SWS

February 13, 2020
Updates to SWS Maintenance Charter and Procedures Document
[Read all News & Updates](#)

How To Video
 [How to use the Standard Work Specifications \(SWS\) Online Tool](#)

Installer Badges Toolkit
Use "badges" in the toolkit to define tasks or measures an installer could perform on a home. Learn about and download toolkit.

Name	Type
 2018_CL JTA Spreadsheet w_Badges...	Microsoft Excel Worksheet
 Badges Toolkit_Worksheet_2019	Microsoft Word Document
 How to Use the Badges Toolkit_2019	Microsoft Word Document
 Retrofit Installer PASSPORT 2019	Microsoft Word Document
 RIT Badges Verification Criteria_2019	Microsoft Word Document



NASCSP Member Portal

Requests for Proposals



Webinars



Training

- Georgia
- Georgia 2019
- Indiana
- Iowa
- Louisiana

Software Systems

- Delaware

NASCSP WAP Network Resources

> WAP Network Resources

> Sample Documents

Field Standards and Guides

Sample RFPs

Monitoring

Programmatic Manuals

Energy Education

Weatherization Works Logos

WAP Webinars

NASCSP Resources

<https://nascsp.org/wap>