

V.8.4 Training and Technical Assistance Approach and Activities

Standard Training Plan

In July 2017, the Division entered into a three-year contract agreement (with two optional two-year renewals) for Training and Technical Assistance (T&TA) services with Slipstream. Administered and delivered by Slipstream, the Standard Training Plan provides specific trainings available to subgrantees each year. This training system provides courses at the basic, intermediate, and advanced levels for installers, energy auditors, final inspectors, data management and support staff, and fiscal and program management staff. This allows Wisconsin to offer Comprehensive Training for all WAP personnel (as required by WPN 15-4, Section 4), as needed, based on the one-on-one reviews with the Subgrantees. Training content addresses 1-4 unit and 5+ unit as well as site built housing and manufactured homes.

Training content is delivered through online training and skills building activities, virtual webinar, classroom, demonstration props, computer labs, and field hands-on to support effective education. Under the existing Standard Training Plan and funding level, the training system has the capacity to provide up to 1,400 in-person or virtual webinar training slots per year, with more than 60 training sessions. While core trainings are delivered each year, the annual work plan varies based on training needs assessments and funding levels. As a result of the COVID-19 pandemic, training delivery pivoted from in-person delivery to virtual webinar and online self-directed training.

As referenced above, subgrantees are required to develop an annual training and technical assistance plan. As a part of the annual planning process, the Division provides subgrantees with a list of potential trainings for the upcoming year. Subgrantees are asked to identify any specific training needs within and in addition to the Standard Training Plan. Commonly identified training needs are added to the annual statewide training plan. Uncommon subgrantee training needs must be supported by the subgrantee's local plan.

In addition to the training needs assessment, subgrantees are required to complete an annual T&TA planning workbook which outlines T&TA activities for the contract period based on their allocation. The subgrantee plans include the training needs assessment survey, training not available through the training contract, local training delivery systems, the costs of sending staff to trainings, and customer education delivery.

Of the statewide T&TA services (37%) and subgrantee's local T&TA budgets (31%), we anticipate approximately 51% of the DOE funds will be allocated for Comprehensive training and 49% for Specific trainings.

As a part of the T&TA planning process, Slipstream develops an annual work plan based on an annual subgrantee one-on-one training needs assessment, real-time surveys, and other DOE requirements, including but not limited to DOE Project Officer feedback. The work plans are reviewed internally by Division staff.

Training Activities

Percent of overall trainings:

Comprehensive Trainings: 51%

Specific Trainings: 49%

Percent of budget allocated to Auditor/QCI trainings: 35%

Percent of budget allocated to Crew/Installer trainings: 35%

Percent of budget allocated to Management/Financial trainings: 30%

Training is provided through various delivery mechanisms. Wisconsin's Comprehensive training program includes standard trainings encompassing occupation specific training programs associated with the WAP Job Task Analyses (JTA). Wisconsin's Standard Training Plan provides a central training framework and addresses both short and long term training needs. The subgrantee T&TA plan, referenced above, provides funds to subgrantees for local training needs and initiatives, and having staff attend training sessions identified as a priority and offered through Slipstream, the T&TA contractor training center.

The Division characterizes training activities as a specific deliverable training session or a system of training sessions, while technical assistance activities are characterized as program development projects or maintenance. Both training and technical assistance deliverables are driven by the overall objectives of saving energy and reducing the state's carbon dioxide and other greenhouse gas emissions. To reach those objectives, the provider network must deliver quality installations, at the lowest possible cost, to the greatest possible number of dwellings. Every training or technical assistance activity delivered is considered in the light of those objectives.

Wisconsin anticipates allocating approximately 15% of the new DOE funding for Training and Technical Assistance (T&TA). These funds are retained by the State, allocated to the subgrantee, or allocated to subcontractors that provide the following services, by percentage:

32% State staffed monitoring and oversight of subgrantees.

37% Statewide T&TA services including the training program, technical assistance and development projects, and Quality Assurance inspections.

31% Subgrantees' local T&TA budgets.

Comprehensive trainings:

- **Energy Auditor Certification**

Since 2003, Wisconsin has been providing annual Energy Auditor trainings with a certification test at the end of the training. The Wisconsin Weatherization Basic Energy Auditor Certification became mandatory for all energy auditors on July 1, 2009. Certification requires successfully completing the Energy Auditor training (classroom and field) and the Introduction to Weatherization Assistant course. The Introduction to Weatherization Assistant includes training on the National Energy Audit Tool (NEAT). Since 2007, over 220 Energy Auditors have been trained and certified to work in Wisconsin's program. New energy auditors who are not yet certified must have their work reviewed by a certified energy auditor prior to issuing any work orders.

Per the Home Energy Plus Weatherization Program Manual, all persons auditing homes with the Wisconsin Weatherization Assistance Program shall obtain a Wisconsin Weatherization Basic Energy Auditor Certification within 12 months of beginning to audit homes for the program.

Staff working toward a Wisconsin Weatherization Basic Energy Auditor Certification will be considered an Energy Auditor Trainee and shall have their audits reviewed and signed off on by a certified Wisconsin Weatherization Basic Energy Auditor. Completion of the Basic Energy Auditor Certification requirement advances the energy auditor beyond the trainee status.

Four requirements shall be completed to become a certified Basic Energy Auditor:

1. Meet the DOE Weatherization Assistance Program Core Competencies prerequisite for Basic Energy Audit Competencies, which are:

- Ability to read and write legibly;
- Basic verbal and written communication skills;
- Basic construction knowledge;
- Basic math skills; and
- Basic computer skills.

2. Complete and pass the Building Science Principles course.

3. Complete and pass the Energy Auditor course (classroom and field).

4. Complete and pass the Introduction to Weatherization Assistant course.

Further details can be found in a document called [Core Competencies for the Weatherization Assistance Program](#) on the Home Energy Plus Website and in the NREL Energy Auditor Job Task Analysis. The BPI HEP Energy Auditor (EA) certification is not required for energy auditors working in Wisconsin's program. BPI HEP EA certification is required for individuals working toward BPI HEP Quality Control Inspector (QCI) certification.

Quality Control Inspector Certification

In 2019, the BPI HEP Quality Control Inspector (QCI) certification changed to a micro-credential under the BPI HEP Energy Auditor (EA) certification, Wisconsin's QCI staff will need to achieve QCI recertification by completing the application for BPI HEP EA and the corresponding field exam and meeting CEU requirements to avoid the BPI HEP EA written exam. The Division and Slipstream will work with current QCIs candidates to ensure they have EA prerequisites and the necessary Continuing Education Units to bypass having to challenge the EA written exam. Presently, QCI certified individuals have access to four Slipstream created online CEU activities equating to 6.0 CEUs. A fifth activity is currently under development.

The over one-third of Wisconsin's QCI certified individuals were due to recertify during PY21. Due to the COVID-19 pandemic, no BPI HEP EA field exams were completed, and BPI extended the recertification deadline to September 2021. The majority of Wisconsin's QCI certified individuals will need to recertify in PY22.

In support of individuals challenging the BPI HEP EA and QCI certifications, the following refresher courses have been developed.

- BPI HEP Energy Auditor Written Exam Prep (online self-directed)
- BPI HEP Energy Auditor Field Exam Prep (online self-directed or in-person)
- BPI HEP Quality Control Inspector Written Prep (online self-directed)

Access to the online refreshers will be available to existing certified staff or to new staff seeking certification. The number of in-person field prep refresher courses will be determined based on identified subgrantee need.

COVID19 Workplace Safety

The Division supports and promotes participation the online COVID19: Workplace Safety training, developed through the Santa Fe Community College now hosted through the DOE xxx portal, to all Wisconsin Weatherization program staff and contractors. This interactive four (4) hour class covers information to help get safely back to work in this time of the COVID19 pandemic. Relevant to both office staff and field staff, the training has been developed with a credentialed OSHA safety trainer and explains safety precautions, specific job recommendations and communication skills needed going forward. The training is provided at no cost to the subgrantee weatherization staff.

Building Science Principles

The Building Science Principles serves as the entry level training course for field staff, energy auditors and inspectors as well as any other program staff. This session focuses on the science/physics of Air Flow, Heat Flow and Moisture Flow, and illuminates the concept of “House as a System” thinking by providing examples, then tests application of knowledge and comprehension with a case study. The training will be offered during PY 22 as in-person and online and serves as a pre-requisite course for Retrofit Installer, Crew Leader, and Energy Auditor training programs.

Energy Auditor – IREC Accreditation expires 12/14/2021

The Energy Auditor training program has been revised to correlate with the updated BPI HEP Energy Auditor (EA) JTA. The training program will consist of three training courses: Building Science principles, Energy Auditor (classroom and field), and Introduction to Weatherization Assistant. IT is planned for each of these trainings to be held at least once during PY22. Slipstream will be submitting an application to IREC during the fall of 2021 to retain accreditation for the Energy Auditor credential.

Energy Auditor Refresher

- Weatherization Assistant Update for Auditors and Training Modules (Annual Refresher and on-line training modules are available ongoing each year)
- Diagnostic Workbook

Retrofit Installer Technician – IREC Accreditation expires 12/14/2021

The Retrofit Installer Technician training program is under re-design. The revised training program will consist of three training courses: Building Science Principles, Basic Blower Door and Air Sealing, and Retrofit Installer Boot Camp. These trainings may be offered depending upon need identified in the T&TA Workbook completed by the subgrantees in late May 2021. Slipstream will be submitting an application to IREC during the fall of 2021 to retain accreditation for the Retrofit Installer credential.

Crew Leader – IREC Accreditation expires 12/14/2021

Consists of two courses: Weatherization Crew Leader (2 day) and the newly developed Combustion Safety course addressing transition to BPI 1200 for greatest negative pressure content. Due to the combination of the JTA for Retrofit Installer and Crew Leader, participants will need to complete the Retrofit Installer Technician course prior to attending the Weatherization Crew Leader training program. These trainings will be offered based on need identified in the subgrantee completed T&TA Planning Workbook in late May 2021. Slipstream will be submitting an application to IREC during the fall of 2021 to retain accreditation for the Retrofit Installer and Crew Leader credential.

Quality Control Inspector (QCI) – IREC Accreditation expires 04/24/2024

Consists of one course: Quality Control Inspector (3 day)

Depending on the identified need from the T&TA Workbook needs assessment survey this session will be offered to ensure staff have adequate training if they want to prepare for the BPI HEP EA/QCI credential.

Multifamily Energy Auditor training – The Division is working with Slipstream to deliver an IREC accredited Multifamily Energy Auditor training program. This training is planned for advanced energy auditors. This session may be offered once during the program year based on subgrantee feedback in the T&TA Planning Workbook Needs Assessment Survey.

Additional Training - Additional training may be offered based on the annual T&TA planning workbook completed by each subgrantee, which includes a needs assessment survey. The following trainings are cross-walked with relevant JTAs. Typical workshops include:

- Residential Thermography (Field Staff)
- Air Sealing through Zone Pressure Diagnostics (Auditors, QCI/Final Inspector, Crew Leaders and Crew Members)
- Asbestos Weatherization Bridge (Field Staff)
- Basic Diagnostics & Air Sealing (Field Staff)
- Comprehensive Audit Review (Managers, Auditors, Inspectors)
- Forced Air Heating System Testing & Diagnostics (Auditors/Inspectors)
- Spray Foam Properties and Procedures (Field Staff)
- Targeted Dense-Pack and Advanced Insulation Techniques (Crew Leader and Crew)
- Weatherization Assistant Level 2 (Auditors)
- Weatherization Assistant – MHEA (Auditors)

Regular JTA aligned training is offered every three to six years or as needed based on the annual need's assessment and changes to the program requirements, technologies and techniques.

Additional Comprehensive Training Topics

Additional training may be offered based on the annual T&TA Planning Workbook that each agency completes, which includes a needs assessment survey. The following trainings are cross walked with JTA. Typical workshops include:

- Residential Thermography (Field Staff, QCI/Final Inspector)
- Air Sealing through Zone Pressure Diagnostics (Auditors, QCI/Final Inspector, Crew Leaders and Crew Members)
- Asbestos Weatherization Bridge (Field Staff)
- Basic Diagnostics & Air Sealing (Field Staff)
- Forced Air Heating System Testing & Diagnostics (Auditors/Inspectors)
- Targeted Dense-Pack and Advanced Insulation Techniques (Crew Leader and Crew)

Regular JTA aligned training is offered every three to six years or as needed based on the annual need's assessment and changes to the program requirements, technologies and techniques.

Wisconsin's biennial technical training event, **Weatherize Wisconsin: Building Science at Work**, scheduled for September 2020, was postponed due to the pandemic. The next event is planned for September 2022. The Weatherize Wisconsin training event provides a venue for Wisconsin's weatherization professionals to showcase best practices and cost effective solutions. This event provides a refresher reinforcing the JTA for energy auditors/inspectors, and crew/installers. Sessions also highlight Health and Safety practices for lead and asbestos, OSHA, and Standard Work Specifications. Planning will begin for the 2022 event.

Specific Training

Customized Training and Technical Support: Production Based Training (PBT)

The PBT system, Wisconsin's Specific Training program, was developed to provide immediate training and/or technical assistance support for subgrantee staff and subcontractors with deficiencies noted through Quality Assurance monitoring or other performance factors. Typically, the process starts with Quality Assurance staff identifying specific needs and assessing the severity of the issue. Slipstream receives a request to provide onsite training and/or technical assistance within one month of the request. Training is available for a wide variety of building science, diagnostic testing, building modeling topics, and weatherization technical requirements. Examples of PBT include advanced air sealing, new auditor mentoring, and reconciliation of direct labor rates. Visits for PBT are designed to provide training and support for specific crews or contractors whose work was cited by our Quality Assurance team. The support is hands-on technical training, delivered without a classroom, during the weatherization process. The trainer works directly with the installers to improve their skills while completing a job. PBT immediately targets subgrantees with deficiencies noted through

Quality Assurance reviews and other performance factors, with the goal of providing training within a month of the referral.

Additional training and technical assistance are available for subgrantees whenever our evaluations identify lower performance levels. Additional studies have been performed on high performing subgrantees to determine what helps them succeed so that information can be shared with other agencies within the state. Subgrantees can request technical assistance in support of updates, implementation and troubleshooting related to the Weatherization Assistant modeling software.

Weatherization Assistant Technical Assistance

Additional training and technical assistance are available for subgrantees whenever our evaluations identify lower performance levels. Additional studies have been performed to identify and record high performing subgrantees to determine what helps them succeed. Peer exchange is facilitated to share high performing subgrantee process and procedures with other subgrantees within the state.

The Division hosts an annual training conference, **Home Energy Plus Training Conference**, brings together agency staff from the energy assistance program, the weatherization program and utility representatives. The training conference conducts concurrent sessions that focus on weatherization, energy assistance, program partnerships, and creative coordination efforts. Approximately 300 participants from all the programs can network, learn about other resources that are available to customers and improve collaboration. This event will be held January 31 to February 2, 2022.

Additionally, Wisconsin is the host state for the **Better Buildings: Better Business Conference**. The conference offers 2.5 days of workshops focusing on building performance, mechanical systems, diagnostic testing, customer education and services, with sessions that provide BPI continuing education credits. Due to the pandemic, the 2021 event moved to a virtual platform with one of the virtual sessions occurring in August 2021. The 2022 event will be held February 28 to March 2, 2022.

Management trainings are also offered in conjunction with the Weatherization Operators of Wisconsin quarterly meetings. These training can range from a half day to one full day depending on the topic. General topics may include:

- Management & Supervisory Series: Diversity and Inclusion, Leadership, Communication, Supervisors and the Law
- Financial Management: Cost Allocation & Accounting, 2 CFR 200, Administration & Support
- Procurement and Subcontractor Management: Packaging & Awarding Bids, Quality Control & Right-to-Cure
- Comprehensive Audit Review
- Weatherization Outreach and Marketing

- Succession Planning for Key Staff

During 2021, Wisconsin invested in online training for weatherization subgrantee staff most notably transferring the recorded video Mold and Moisture Awareness training to the online learning management system (LMS). Additional training content will be transferred to the online LMS in support of technical and management trainings.

The technical assistance work plan allows the Division to provide one-to-one guidance on financial management, PBT, and the Weatherization Assistant energy audits. In accordance with WPN 15-4 Section 4, Slipstream has integrated the respective Job Task Analysis requirements into Wisconsin's existing training curriculum.

Required Subgrantee Training Attendance

Subgrantee attendance is typically required at trainings or meetings where Division policy changes are reviewed. Specific trainings and applicable certifications are required for lead renovator, and asbestos disciplines that allow for the safe weatherization of buildings, and proper work procedures when mold and moisture problems are noted.

Attendance for all training is tracked in a database maintained by Slipstream. The database is also used to track required trainings and renewals for Wisconsin Weatherization Basic Energy Auditor and BPI QCI certifications.

Training Management and Tracking System

The Home Energy Plus Training Management and Tracking System provides training information and training staff recordkeeping as well as supporting training administrative functions. All information related to weatherization training workshops, webinars, conference, as well as special meeting or activities such as PBT and training retention activity participation is tracked in the system. The system interaction with the Home Energy Plus T&TA website includes the events calendar, online registration and posting of event specific materials.

Technical Assistance Activities

Broadly, technical assistance funds are used to enhance and maintain the quality of the services available to Wisconsin's Weatherization Assistance Program customers. Projects vary widely, and examples include research on specific weatherization measures or an onsite consultation for a subgrantee on quality assurance issues. Generally, a project must in some way work to further the objectives or requirements of the program. Listed below are the in-progress or planned technical assistance projects for this funding period.

Major Home Energy Plus Technical Assistance Projects for PY2021

WA Online Transition

In preparation for the implementation of WA online, the following process will be completed.

Prior to July 2021

- Begin review program policy, guides, training, equipment, and data areas to aid in development of plan.
- Review and provided feedback as requested on initial conversion curriculum provided by ORNL in Spring 2021.
- Provide an WA v10 introduction to the weatherization agencies during annual meeting.

July 2021

- Participate in ORNL/DOE WA v10 feedback and curriculum plan session during summit.

September – October 2021

- Review newly released WA v10 curriculum.
- Begin developing Wisconsin specific WA v10 training.

November 2021

- Participate in the ORNL/DOE WA v10 Train the Trainer events for Grantees and Training Providers.
- Finalize revision of Wisconsin specific training curriculum materials.

December 2021 – March 2022

- Develop draft policy and procedural guidance language and materials.
- Deliver Wisconsin specific WA v10 training to pilot agency energy auditors.
- Revise and adjust training materials as feedback warrants.

April – May 2022

- Finalize policy, procedures, and materials.
- Update training to incorporate policy and procedures as necessary.
- Schedule and deliver hands-on WA v10 training for all energy auditors using computer lab.
- Develop training for non-auditor staff (as needed).

June 2022

- Delivery training for non-auditor staff (as needed).
- Agencies begin using WA v10.
- Provide technical assistance support to agencies for start-up issues and use questions.
- Hold Q&A session for WA v10 users.

July 2022

- WA v10 Implementation statewide.
- Continue technical assistance support for agency staff.

Weatherization Customer Guidebook – Maintenance and updates of the Weatherization Customer Guidebook will continue. This web based consumer education tool allows

subgrantees to create a customized guide noting the weatherization measures completed for each single family home weatherized. The Guidebook includes maintenance requirements for measures, as well as general energy management tips. The Guidebook went live on October 1, 2008 and is required for single family and manufactured homes. Features and measure information are modified as needed based on changes to technologies installed in the home.

Document Design Services – Document design and support for the Home Energy Plus Programs brochure, informational materials, the Wisconsin Weatherization Assistant Guide, the Wisconsin Weatherization Procurement Guide, and the Weatherization Field Guide. Wisconsin completed a major revision of the Weatherization Field Guide in PY 2018 to incorporate the relevant SWS requirements as required by WPN 15-4, Section 1. As noted under Section 5.1, Wisconsin is completing the cross comparison to align the Field Guide with the SWS.

Weatherization Measures Support – Analysis and maintenance of measures and field protocols. Currently in progress is an annual review of measure savings to investment ratios, combustion safety protocols, and new water heater technologies.

Self-Evaluation Savings Study (SES) – Starting in 2007, Wisconsin completes a Self-Evaluation Savings (SES) study analyzing the savings achieved in weatherized natural gas units, on a biennial basis. Actual pre- and post- weatherization natural gas and electric consumption is collected from regulated utilities. Data collected is utilized in an analysis of the therm and kWh savings of weatherized homes from the most recent program years. Generated results from the analysis are presented in a detailed report providing information for the full program and at a Subgrantee level.

Energy Audit Maintenance – Energy audit maintenance, coordination, and enhancement including managing the setup libraries, program upgrades, and customizing the audit, as feasible, for Wisconsin use. Wisconsin will continue to work with Oak Ridge National Laboratory (ORNL) to test the new MulTEA tool for small multifamily buildings. Wisconsin will also continue working with ORNL to integrate a web based version of Weatherization Assistant when it is available.

Home Energy Plus Information Call Center – Provides for the operation and management of a call center. This tollfree number serves as an entry port for the public to the Home Energy Plus programs. Each year on average, the Call Center fields about 36,000 calls related to the Energy Assistance and Weatherization Programs.

Home Energy Professional Quality Control Inspector Planning – As noted in Section V.5.3, Wisconsin has implemented a Grantee Developed QCI policy to comply with WPN 15-4 Section 3.