

Training and Technical Assistance Needs Analysis and Planning

May 2021



Objective

At the end of this session you will know:

- What T&TA info needs to be in the plan
- Where to find applicable regulations & guidance
- Activities that can be covered with T&TA funds

And you will be introduced to a systematic approach to T&TA planning and implementation.

Before we start...

- Remember why we train?

It's part of an on-going process



T&TA Plan – Bare Minimum

- Describe proposed plan and milestones necessary to achieve it.



T&TA Plan – Bare Minimum

- How does the plan reflect feedback?
- How is the Grantee maintaining workforce credentials?
- Subgrantee training opportunities
- Requirements before working unsupervised.
- How the Grantee plan reflects future requirements.
- Statewide partners, if applicable.

T&TA Plan – Bare Minimum

- Energy savings comparisons re: training.
- Grantee assessment & follow-up activities.
- Health and Safety Plan-related training.
- Approach to client education.

If applicable:

- Contractor retention agreement

T&TA Plan – Bare Minimum – Where to Learn More

- WPN XX-1 – Current Program Year Guidance Application Instructions:
 - Section III.2 – Section B: Budget Categories
 - Describes allowable expenditures
 - Section V.8.4 – Training & Technical Assistance
 - Describes Plan minimum requirements
- WPN 10-1 – Sample Retention Agreement

Bare Minimum

- Technical training for field staff.



T&TA – Eligible Costs

- Costs incurred in the training and technical assistance for any Grantee or Subgrantee
 - Including monitoring and QCI training
 - Not limited to technical topics
 - Fiscal
 - Managerial
 - Change management
 - Whatever you determine you need to meet mission of WAP

T&TA – Eligible Costs

- Client education
 - Developing resources
 - Low-cost items
 - Activities



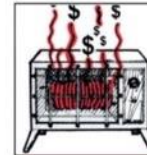
What saves the most **ELECTRICITY?**

Electricity is sold in KWHs or kilowatt-hours
1 KWH= 1,000 watts metered in one hour



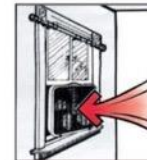
Unplug that second refrigerator or freezer.

SAVE
\$252 or 1,800 Kilowatt-Hours—Per Year



Reduce your need for electric space heaters. Weatherize your house and wear winter clothing.

SAVE
\$101 or 620 Kilowatt-Hours—Per Heater—Per Year



Switch from Air Conditioning to fans to stay cool. Exhaust hot air when it's cooler outside.

SAVE
\$49 or 350 Kilowatt-Hours—Per Family of 3—Per Year



Electric usage adds up so turn off unused TVs, lights and appliances.

SAVE
\$37 or 267 Kilowatt-Hours—Per Family of 3—Per Year

T&TA – Eligible Costs

- Evaluation of Program outcomes.



T&TA – Eligible Costs

- Participation, travel, logistics of training activities and events.
 - NASCSP
 - Energy Out West
 - HPC (National and regional conferences)
 - State conferences
 - Training planning meetings
 - And more



T&TA – Eligible Costs

- Grantee purchases of vehicles or equipment, which are directly related to specific training and technical assistance activities, such as monitoring, etc.



A bit about Training Needs Analysis

Training Needs Analysis

- A systematic approach to determine what training needs to take place.
- Can be described in 8 steps.

Training Needs Analysis – Step 1

- Determine the desired outcomes
 - Goal should correspond to a company/program objective
 - Examples:
 - Reduce call-backs by 50% in one year.
 - Improve speed of installations while maintaining work quality at current levels.
 - Reduce identified missed opportunities by 75% in 1 year

Training Needs Analysis – Step 2

- Link Desired Outcomes with Employee Behavior
 - Identify needed competencies (JTAs are very helpful!)
 - What skills are needed to achieve this goal?
 - What behavior is critical to completing this task?
- Example – Reduce Call-backs
- Skills/competencies include:
 - Arrive to work fit and on time each day
 - Correctly install all measures typically included in work scopes
 - Note discrepancies between work order/notes and on-site reality
 - ...etc.

Training Needs Analysis – Step 3

- Identify Trainable Competencies
 - Evaluate the critical competencies to determine if they are:
 - Abilities one should possess prior to job entry, or
 - Abilities that can be learned on the job or through training

Training Needs Analysis – Step 4

- Evaluate Competencies and Determine Performance Gaps



Training Needs Analysis – Step 4

- Evaluate Competencies and Determine Performance Gaps
 - Evaluate current performance to identify where the gaps are between current ability and desired ability.
 - To evaluate current performance use:
 - Performance evaluations
 - Self assessments
 - Prior training results (assessments)
 - Interviews
 - Client feedback
 - Monitoring reports
 - Actual energy savings

Training Needs Analysis – Step 5

- Prioritize Training Needs
 - Identify % of employees who need the training
 - Consider the importance of the competencies on the program objectives

Training Needs Analysis – Step 6

- Determine How to Conduct Training
 - Consider adult learning theory – all of the WTCs are aware of these principles.
 - Training methods can range from:
 - OJT
 - Mentoring/coaching
 - Classroom/lecture
 - Web-based/distance learning
 - Reading
 - Management programs

Training Needs Analysis – Step 7

- Cost/Benefit Analysis
 - Consider costs associated with the training methods, the extent to which training will address the performance gap, and the impact on the program.
 - Cost factors include:
 - Training time
 - Content development time (if done in-house)
 - Training provider evaluation (if purchased from outside)
 - Lost productivity from time spent in training
 - Travel and logistical expenses

Training Needs Analysis – Step 8

- Planning for Training Evaluation
 - Training is only effective if the information is retained and applied on the job. Evaluation of training is critical.
 - Questions to consider in evaluation include:
 - How much did the training improve competencies?
 - How did the training improve job performance?
 - How did the training support meeting the goals of the organization/program?

T&TA Planning & Reporting Template

[illegible]

Use of Template is Optional

T&TA Template Introduction

*This template was created to assist Weatherization Grantees to easily organize their annual training plan to meet the requirements of Weatherization Program Notice (WPN) 15-4. Once the plan has been approved by your Weatherization Project Officer, the Grantee can continue to use this template throughout the fiscal year to capture key metrics for each completed training course or session. At the end of the fiscal year, the Training & Technical Assistance (T&TA) planning and reporting template can be used to complete the training section (or as an attachment) of the **Annual Training, Technical Assistance, Monitoring and Leveraging Report**.*

Description of Information Fields

Column	Title	Description
A	Training Topic(s)	Record the specific topics you plan to offer the attendees, such as: ASHRAE 62.2 Policies and Procedures Updates Energy Auditor comprehensive
B	Training Requested or Initiated by:	Choose from the drop down menu. To add more options, select box. Click Here

Resource Review

- RFP Template:
 - <https://www.energy.gov/eere/wap/downloads/wap-request-proposals-toolkit-training-technical-assistance-services>
- WPN XX-1 – Current Program Year Guidance Application Instructions:
 - Section III.2 – Section B: Budget Categories
 - Describes allowable expenditures
 - Section V.8.4 – Training & Technical Assistance
 - Describes Plan minimum requirements
- WPN 10-1 – Sample Retention Agreement
- T&TA Planning & Reporting Template:
 - <https://www.energy.gov/eere/wap/downloads/training-and-technical-assistance-plan-template>

Remember...

- The purpose of training is to improve work quality.
- If training isn't applied on the job, it was an expensive waste of time.
- WPN XX-1 always includes bare minimum you must include in T&TA Plan.
- There is a LOT you can do with your T&TA plan & funds.
- Training Needs Assessment provides a systematic approach.
- The T&TA Reporting Template is optional, but helpful.

It's an on-going process



Questions?

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Independent leadership.
Trusted clean energy expertise.

WAP Manager Orientation - T&TA part 3

May 13, 2021

Anna Sullivan

Interstate Renewable Energy Council, Inc. (IREC)

In this section, we will explore:



- Issuing **RFPs or RFQs** for Training and Technical Assistance (T&TA)
- Using the T&TA **RFP Toolkit**
- Comprehensive** vs. **Specific** Training Requirements in the Quality Work Plan (WPN 15-4)
- The value to grantees of working with **accredited** training providers for certain types of training

Why do I need an RFP for training?

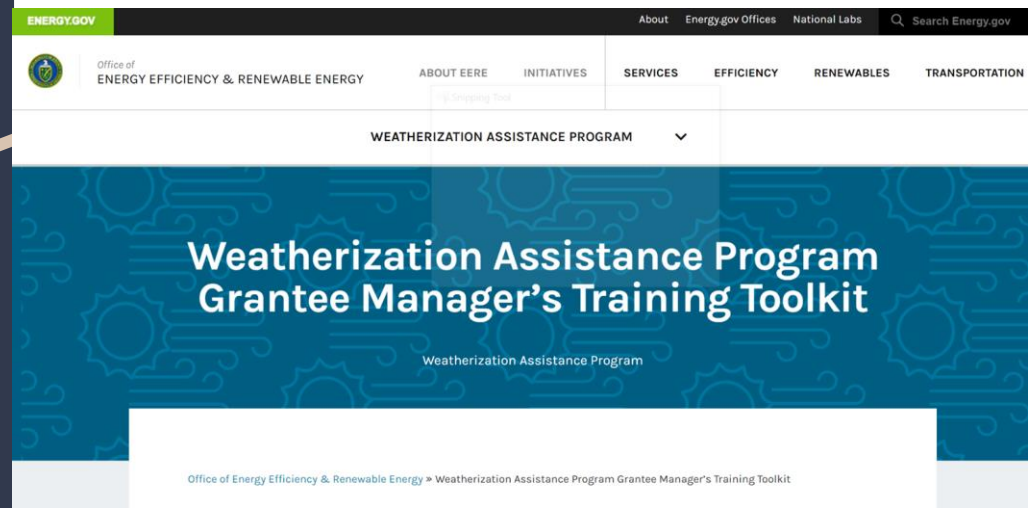


- Program **procurement** rules
- Clarity** around your training needs
- Allows your training provider to **customize** your training program or course
- Receive training in the **format** (in-person, online, blended) and **schedule** that best suits your learners
- Ensure the training provider evaluates each student for **mastery of the learning objectives**

Accessing the T&TA Toolkit



<https://www.energy.gov/eere/wap/weatherization-assistance-program-grantee-managers-training-toolkit>



What does the Toolkit provide?

WEATHERIZATION ASSISTANCE
PROGRAM
REQUEST FOR PROPOSALS (RFP) TOOLKIT
FOR TRAINING & TECHNICAL ASSISTANCE
(T&TA) SERVICES



- improves **consistency** of training requests across the WAP network
- ensures training services are **tailored** to meet the grantee's specific needs
- can be used for **single training** requests or **multi-training** contracts

What does the Toolkit provide?

SAMPLE GRANTEE-LEVEL RFPS

SAMPLE 1 - BEGINNER COMPREHENSIVE ENERGY AUDITOR TRAINING COURSE RFP

Respondents will use the following information to develop a scope of work and proposed timeline including all project tasks and deliverables in the RFP. Evaluation of respondents will include criteria that the scope of work and proposed timeline are realistic, coherent, achievable and support the goals outlined here.

Type of Training & Audience

Grantee is requesting introductory training for recently hired Weatherization Assistance Program (WAP) staff, covering the full [NREL Job Task Analysis](#) for Single-Family Energy Auditor.

Training will be attended by 50 Subgrantee and Grantee staff that have been hired by WAP within the past two years, with some having experience conducting residential retrofits. **All participants meet the prerequisites to sit for the BPI Energy Auditor Exam.**

Standards

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).

Experience and Certifications

Training must be provided by an IREC-accredited training provider. In addition, the designated instructor(s) must hold active BPI EA and GCI certifications. At least three years of experience training in the WAP network is preferred.

Needs Assessment and Training Goals

This training is being planned due to turnover of multiple staff in the WAP network. Training

TIP:

Always provide links to any state-specific resources or include as attachments with the RFP/purchasing document.

-a **template** with recommendations for what to include in the **scope of work**

-questions to ask internally before issuing the RFP

-allows the grantee to receive more **equivalent proposals** from training providers, so that you are comparing **apples to apples**

What to include in the RFP Scope

Sample Subgrantee-level RFP

SAMPLE 1 - MHEA TRAINING FOR EA AND QCI RFP

Respondents will use the following information to develop a scope of work and proposed timeline including all project tasks and deliverables in the RFP. Evaluation of respondents will include criteria that the scope of work and proposed timeline is realistic, coherent, achievable and support the goals outlined here.

Type of Training & Audience

Training Provider will prepare relevant curriculum and conduct a Manufactured Housing Energy Audit (MHEA) training for our agency staff, to include field site data collection and use of the energy modeling software.

All agency energy auditors (6 total) will take the training. Five auditors have more than 10 years of experience, one has less than three years. All hold the HEP Energy Auditor certification. All have received baseline training on the National Energy Audit Tool (NEAT), but not MHEA.

Auditors currently conduct an average of less than 4 audits on manufactured housing per year. 95% of our current work is on single-family homes, 5% on manufactured homes, but our agency plans to increase our work on manufactured housing.

Standards

All training content must meet the following standards and protocols:

- 10 CFR 400
- 2 CFR 200
- U.S. Department of Energy Grant Guidance
- Our State Weatherization Program and Policy Manual
- Our State Weatherization Field Guide
- NEAT/MHEA 8.9 User Guide and related state-specific data collection forms

Experience and Certifications

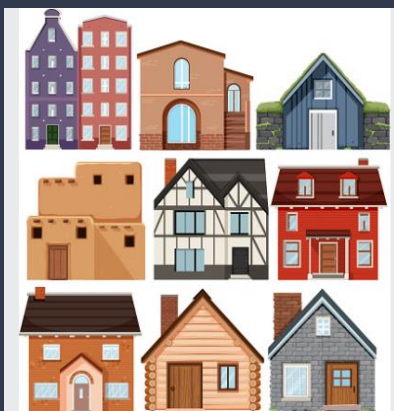
IREC-accredited training providers preferred. Training provider should have 5+ years of experience auditing manufactured housing and using the MHEA tool.

Designated instructor should hold current HEP Energy Auditor certification.

Needs Assessment and Training Goals

- Type of training & audience
- Standards
- Experience and certifications
- Needs assessment and training goals
- Training delivery
- Frequency and length of training
- Curriculum development & training preparation
- Evaluation of learning / learner assessment
- Certification testing & CEUs
- End of course evaluations
- Training retention activities
- Location and logistics
- Administration

Important details in your T&TA RFP



- Any special non-DOE specific certification requirements
- Housing types (i.e. x% single family, x% manufactured)
- Typical housing characteristics (slab on grade, conditioned basements, etc.)
- Fuel types (i.e. gas, electric, propane, oil, etc.)
- Typical mechanical equipment (FAF, boilers, etc.)
- Number of WAP Subgrantees in your network
- Software tool used for building analysis (when applicable)
- Links to current Field Guide and Weatherization Program Administrative Manual

Quiz time



Which of the following data points would help a training provider tailor their response to your RFP?

- a. Common computer type used by subgrantees for data entry
- b. Common housing stock characteristics
- c. Average household income of qualifying WAP clients

What types of training do WAP personnel need?



Department of Energy
Washington, DC 20585

WEATHERIZATION PROGRAM NOTICE 15-4
EFFECTIVE DATE: October 21, 2014

SUBJECT: Quality Work Plan Requirement Update

Quality Work Plan 15-4 states that:

“Grantee training plans must include **comprehensive** training for ALL WAP workers aligned with the NREL Job Task Analysis (JTA) for the position in which the worker is employed.”

Comprehensive Training

“Comprehensive training must be administered by, or in cooperation with, a training program that is accredited by a DOE-approved accreditation organization for the JTA being taught.”

Specific Training

“Single-issue, short-term, training to address acute deficiencies. Conference trainings are also included in this category.”

Comprehensive vs Specific



Comprehensive Training

- For new WAP employees:
 - Covers ALL the knowledge and skills in the relevant JTA to ensure the new worker can perform the job successfully
- For incumbent WAP workers:
 - Ongoing, regular training on a prescribed schedule that ensures JTA knowledge and skills are kept up to date
 - Does NOT require re-taking a FULL comprehensive course unless indicated by employee's supervisor
 - Can include parts of the JTA based on a needs assessment

Comprehensive vs Specific



Specific Training

- Includes single-issue, remedial training due to **immediate, unplanned need**
- Includes **leadership** and **administrative** training
- Also includes **conference** attendance
- Other examples of Specific training topics
 - Training to review updates to Field Guide, Program Notices, or an updated Standard
 - Some manufacturer training sessions
 - OSHA or workplace safety training*
 - Certification test-taking techniques

Quiz Time



What **type** of training should the following topics be classified as?

1. **Energy audit software urgent update**
 - a. Part of a comprehensive training plan
 - b. Specific training event
2. **Lead-safe work practices for crew leaders every two years**
 - a. Part of a comprehensive training plan
 - b. Specific training event
3. **Evaluating bids for program managers?**
 - a. Part of a comprehensive training plan
 - b. Specific training event
4. **Advanced blower door diagnostics for Auditors and QCIs every 2 years**
 - a. Part of a comprehensive training plan
 - b. Specific training event

Job Function	Comprehensive		Specific	
	Course	Frequency	Course	Frequency
Energy Auditors	Full EA Program	Upon hiring	Conference	Alternate years
	Advanced Combustion Safety Diagnostics	Every year	Remedial Course	As needed
	Advanced Pressure Diagnostics	Every 2 years	In-Field Mentoring	As needed
QCIs	Full QCI Program	Upon hiring	Conference	Alternate years
	Standards and Codes Updates	Every year	Equipment Manufacturer Training	As needed
	Advanced Combustion Safety Diagnostics	Every year	Remedial Course	As needed
	Evaluating Air Sealing	Every 2 years	Computer skills	Every 2 years

The value of accredited training



What is **Accreditation**?

Independent third-party validation of a training program against an industry standard.

A process to benchmark against a defined standard of excellence in:

- instructional design, delivery, evaluation
- training environment safety and resources
- program management and improvement

The value of accredited training



Protect the public from unsafe or under-equipped learning environments

Ensure systems in place to protect confidentiality of student data

Verify adequate process of redress to handle **complaints** and **appeals**

Demonstrate that a training provider offers high quality, job-focused training responsive to industry needs

Validate that:

- training prepares students for a defined job in industry

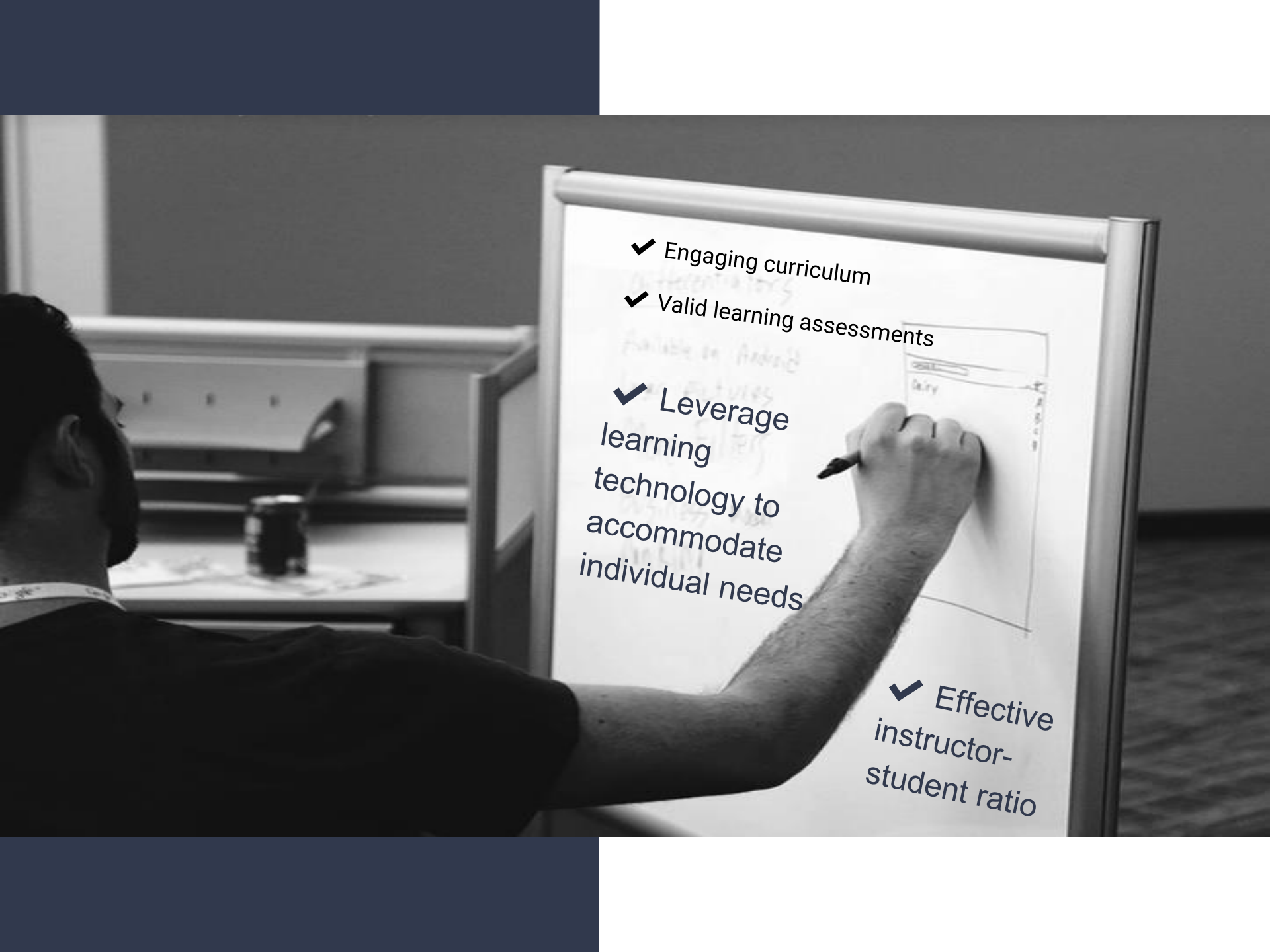
- training experience is fair and unbiased

Active quality management system

Effective continuous improvement

Substantive linkages with industry

Facilitating up-to-date knowledge and skills



✓ Engaging curriculum

✓ Valid learning assessments

✓ Leverage
learning
technology to
accommodate
individual needs

✓ Effective
instructor-
student ratio

Questions

Questions?

For more information, please contact us at:

credentialing@irecusa.org

