

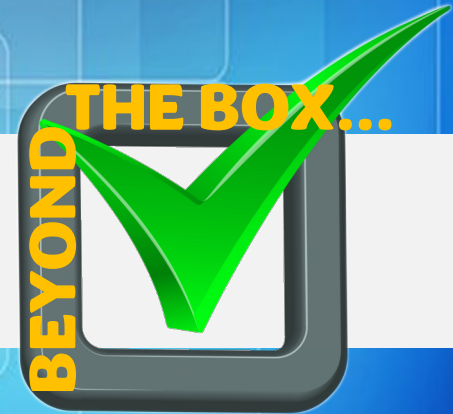


2024 National Association for State Community Services Programs Annual Training Conference

Leveraging T&TA Plans to Support State Workforce Development Needs

Allison Moe, National Renewable Energy Laboratory (NREL)

September 16 – 20 | Renasant Convention Center | Memphis, TN



**TURNING
POSSIBILITIES
INTO REALITIES**

Team



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Context

The Continuous Improvement Workshops build on prior efforts that foster dialogue across the U.S. Department of Energy (DOE) and the Weatherization Assistance Program (WAP) network:

- American Customer Satisfaction Index results
- 2017–18 Solutions Summits
- 2019–23 Continuous Improvement Workshops.

The outcomes of these efforts help DOE plan how to support the WAP network through policy guidance, resources, and other tools.

Context

Some examples of DOE responses to feedback received through Continuous Improvement Workshops.

Continuous Improvement Workshop Feedback	DOE Response
Lack of Subgrantee training in forecasting accurate production numbers and fiscal management (2019)	Developed Subgrantee administrative curriculum to help streamline efforts at this level.
Lack of consistency in the deferral process (2019)	Created materials, including a training video and deferral classification and tracking tool, to help WAP providers track deferrals in a consistent manner.
Concern around COVID-19 implications and response (2020)	DOE issued several guidance pieces pertaining to COVID-19 (WAP Memorandums 060, 062, and 067) and provided free COVID-19 health and safety training via the WAP learning management system.
Lack of sufficient resources for island Grantees (2020)	Monthly island Grantee calls now include an overview of recently released guidance to help interpret the policy for island Grantee weatherization.
Desire to streamline the process for working in multifamily buildings (2021)	Development of optional regional priority lists for low-rise multifamily buildings. Considering priority lists for large multifamily buildings.
Concerns about how best to recruit/retain workers (2022)	Creation of an online WAP Workforce Development Toolkit with information, resources, and case studies. A workforce technical assistance program is in process.

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1 Background and Context (15 minutes)

2 Allowable Uses for T&TA (15 minutes)

3 Group Activity (35 minutes)

4 Close Out (5 minutes)

Background and Context

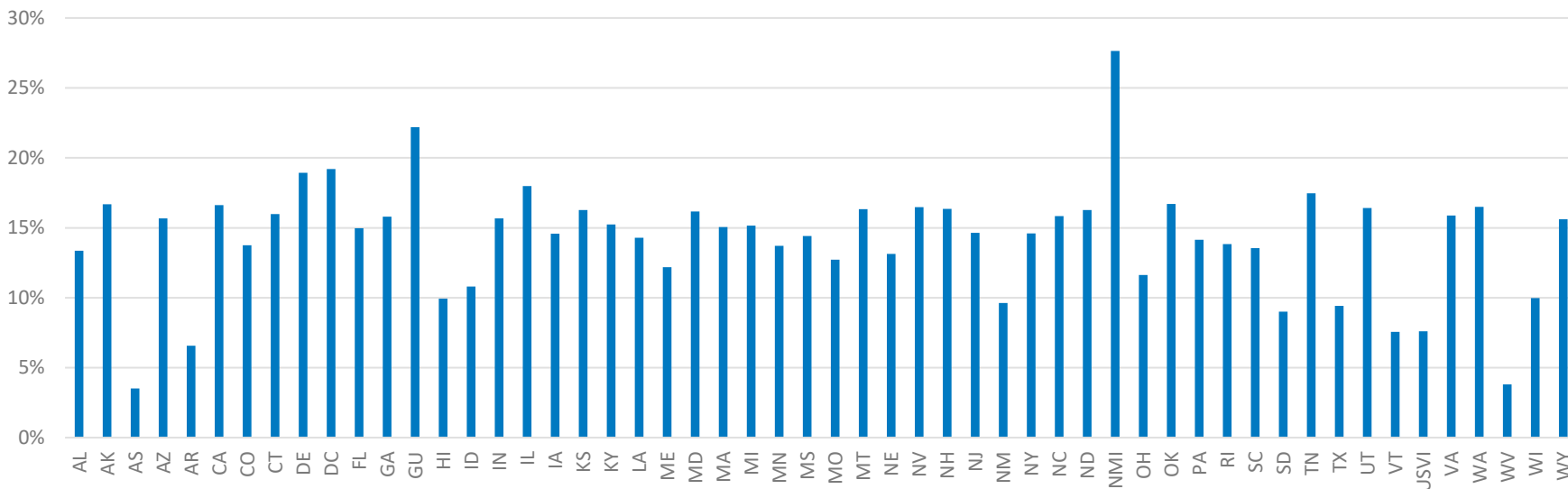
Purpose of Training and Technical Assistance (T&TA) Funds

- Ensure that field workers and administrative staff have needed skills and stay updated with new policies and regulations.
- Enhance program management effectiveness.
- Ensure client and worker well-being.
- Increase energy savings and reduce waste and fraud.

Understanding T&TA Funds

Every program year, Weatherization Assistance Program (WAP) grantees must submit state plans that allocate 10-20% of their funds for T&TA activities.

PY 2023 T&TA Allocation as Percentage of Overall Budget



Understanding T&TA Funds

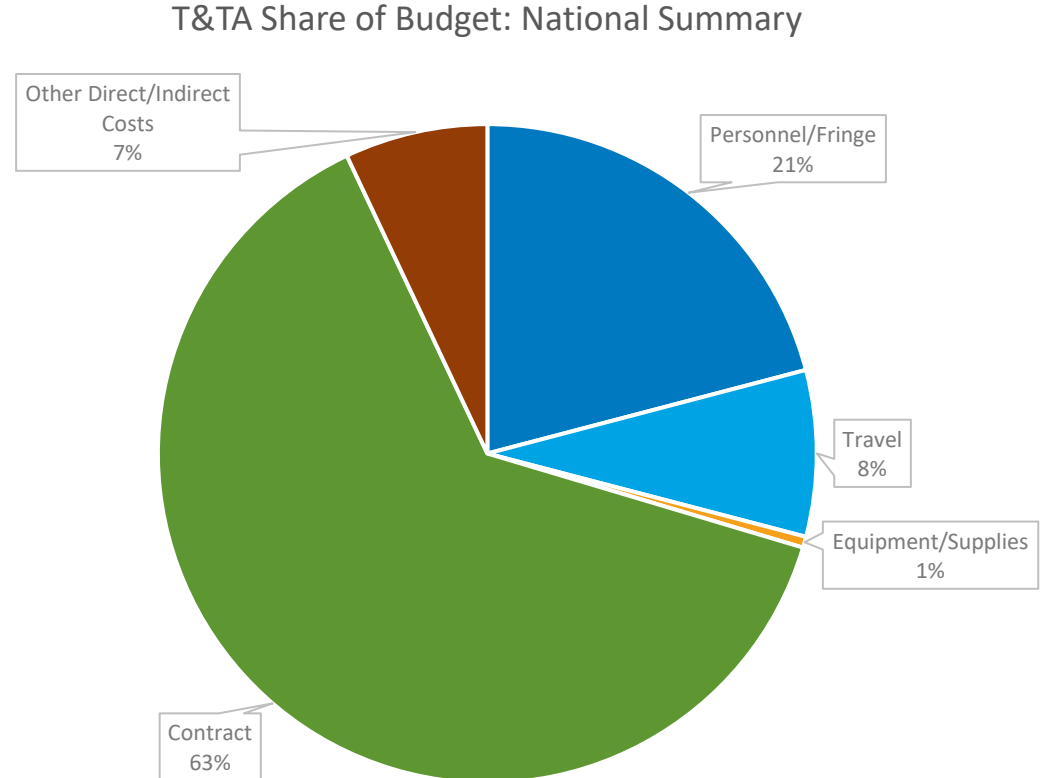
Grantees or subgrantees can be responsible for handling T&TA funds.

Share of T&TA Funds Used by Grantees vs Subgrantees, by State



Understanding T&TA Funds

How T&TA funds are used varies by state.



Process for Developing Your T&TA Plan

Needs Assessment

- Work with subgrantees, training centers, contractors, and other stakeholders.
- T&TA needs may (and probably do) change from year to year.
- Can use the template from the WAP LMS training.

Develop/Submit T&TA Plan

- Address sources of feedback and how it will be incorporated.
- Identify allowable activities that directly address network needs.
- Include existing or planned partnerships.
- Can use the DOE template on the WAP LMS.

Implement T&TA Activities

- Implement activities in accordance with the approved T&TA plan.
- Notify your DOE project officer immediately if you anticipate changes.
- Document all T&TA activities (who/what/when/where/why).

Track and Report on T&TA Activities

- T&TA data.
- Narrative description.
- Trainee evaluations.
- Other stakeholder feedback (as relevant).
- Actual costs.

T&TA Plan Best Practices (from DOE)

1. Regular/ongoing collaboration and communication with all stakeholders.
2. Well-articulated needs, with documentation on how needs were identified (monitoring results, staff/agency feedback, etc.).
3. Clearly align T&TA activities to established needs (as identified in the needs assessment) and program improvement goals.
4. Accurately address training types (specific and comprehensive).

T&TA Plan Best Practices (from DOE)

5. Training details

- List of all training provided over the year including:
 - Who will receive training (grantee vs. subgrantee and/or which roles).
 - Name of the training provider and course titles (when known).
 - Planned dates (months or at least quarter) when you anticipate trainings will occur.
 - Estimated number of people you expect to attend/participate.
 - Estimated cost of the trainings.

Allowable Uses for T&TA

[2 CFR 200.473](#): The cost of training and education provided for employee development is allowable.

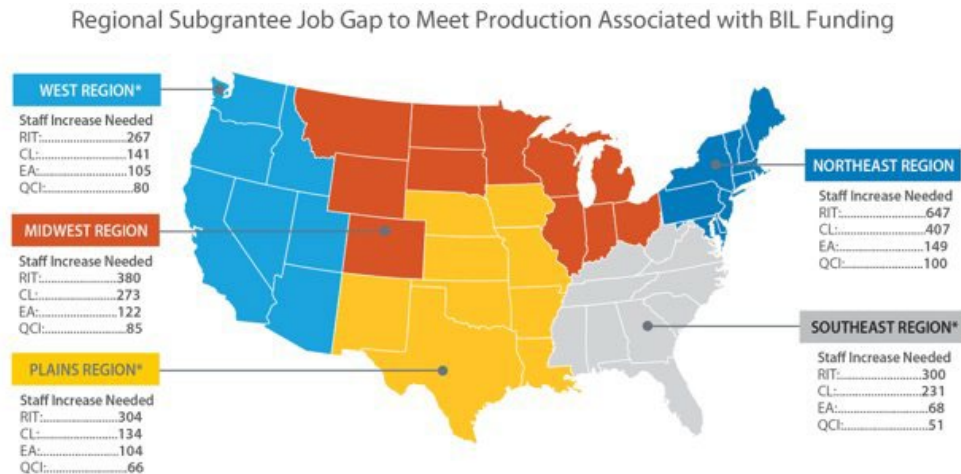
[Weatherization Program Notice \(WPN\) 22-4](#): DOE encourages flexibility in designing comprehensive and specific curricula to ensure trainings are customized to **meet the needs of the weatherization workforce** and unique energy efficiency programs. Uses are categorized as either comprehensive or specific.

There is more flexibility in specific training uses than most states are typically pursuing.

Workforce Development Needs

According to an [NREL survey from 2022](#), WAP subgrantee labor needs related to the influx of Bipartisan Infrastructure Law funds may grow by about 4,000 positions nationwide.

Right now, **recruitment AND retention** are as much a need, if not a higher need, for many agencies compared to training.



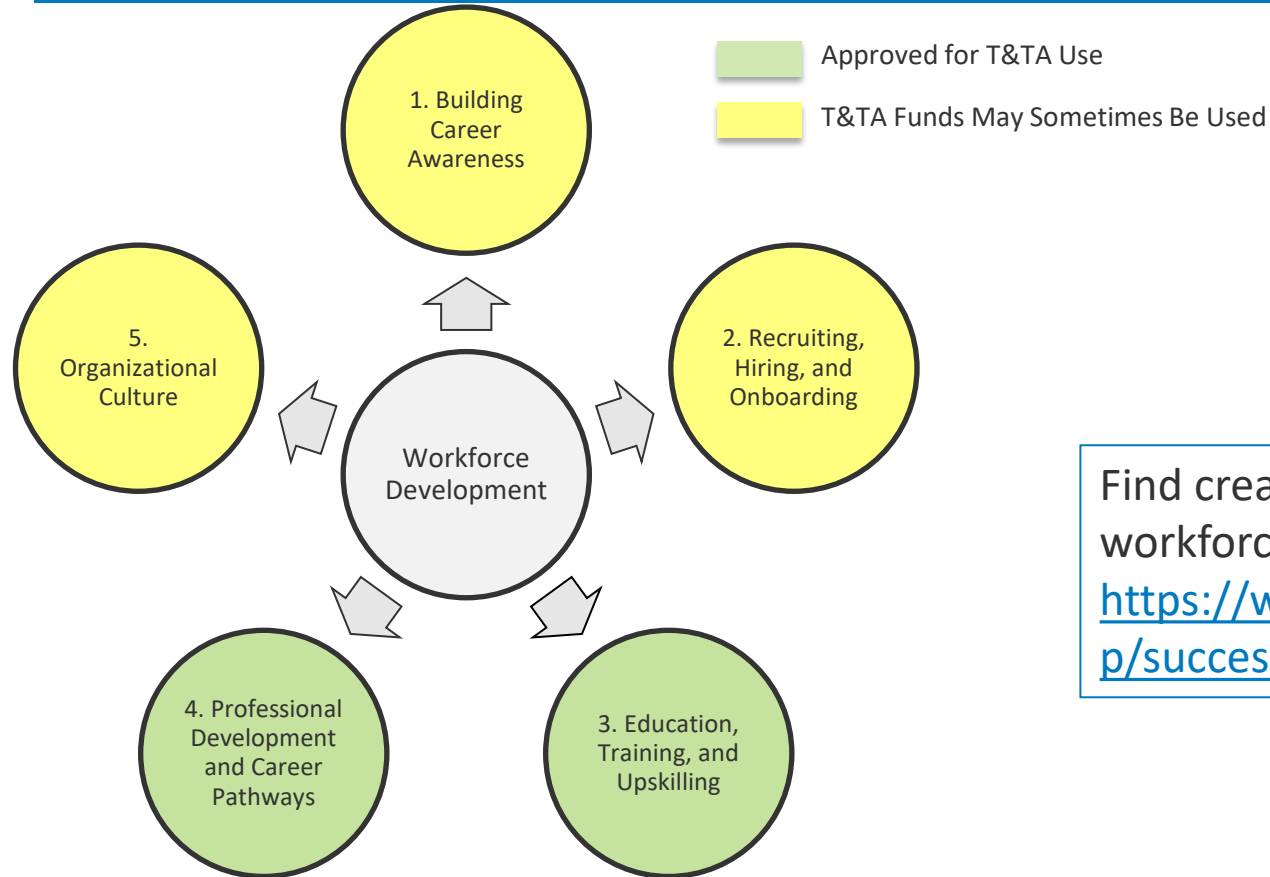
*Results may not be fully representative of the region due to small sample size.

Illustration from NREL

Allowable Uses for T&TA

Based on Feedback from DOE

Using T&TA to Address Broad Workforce Needs



Find creative examples of WAP workforce efforts at <https://www.energy.gov/scep/wap/successes-solutions-center>

1. Building Career Awareness

Can T&TA funds be used for building career awareness?

T&TA funds *could be* used to support the development and use of materials for educational activities clearly focused on growing the weatherization workforce.

Example of allowable activities:

Developing and delivering educational presentations about WAP careers and building science to community colleges, trade schools, high schools, etc.

Requirement for T&TA plan:

The grantee/subgrantee would need to submit a comprehensive plan to DOE on the program, outlining clearly how it supports a training/workforce need, and receive DOE approval.

Justification: New recruits could be considered a “workforce need” per WPN 22-4: “DOE encourages flexibility in designing comprehensive and specific curricula to ensure trainings are customized to meet the needs of the weatherization workforce...”

2. Recruiting, Hiring, and Onboarding

Can T&TA funds be used for recruiting, hiring, and onboarding purposes?

T&TA funds *could be* used.

Examples of allowable activities:

- Developing and implementing youth internship programs/training partnerships.
- Developing or managing an apprenticeship or pre-apprenticeship program.
- Developing and implementing consistent onboarding practices, including the time for new hires and managers to complete the onboarding.

Examples of borderline activities for T&TA funds use (requires further discussion with your DOE project officer):

- Attending recruitment activities such as career fairs.

Examples of activities for which T&TA funds CANNOT be used:

- Employee incentive/recognition programs (e.g., signing or training completion bonuses).
- Hiring referral programs (bonuses for staff that refer a job applicant that ends up getting hired).

Requirement for T&TA plan:

The grantee/subgrantee would need to submit a comprehensive plan to DOE on the training program, outlining clearly how it supports a training/workforce need, and receive DOE approval

Justification: New recruits could be considered a “workforce need” per WPN 22-4: “DOE encourages flexibility in designing comprehensive and specific curricula to ensure trainings are customized to meet the needs of the weatherization workforce...”

3. Education, Training, and Upskilling

Can T&TA funds be used for education, training, and upskilling purposes?

Yes, T&TA funds *can be* used.

Examples of allowable activities:

- Training and certification for retrofit installers, crew leaders, energy auditors, and quality control inspectors.
- Training on a new field guide or program guidance.
- Software training for administrative personnel.

Requirement for T&TA plan:

The grantee/subgrantee would need to submit a comprehensive plan to DOE on the training program, outlining clearly how it supports a training/workforce need, and receive DOE approval

Justification: These can be considered activities to support agency “workforce needs” per WPN 22-4: “DOE encourages flexibility in designing comprehensive and specific curricula to ensure trainings are customized to meet the needs of the weatherization workforce...”

4. Professional Development and Career Pathways

Can T&TA funds be used for professional development and career pathways?

Yes, T&TA funds *can be* used.

Examples of allowable activities:

- Continuing education credits (CEUs) for energy auditors and quality control inspectors.
- Soft skills training/professional development (e.g., management or leadership training, attending conferences).
- Developing and implementing mentorship activities for new or junior staff.

Requirement for T&TA plan:

The grantee/subgrantee would need to submit a comprehensive plan to DOE on the training program, outlining clearly how it supports a training/workforce need, and receive DOE approval

Justification: These can be considered activities to support agency “workforce needs” per WPN 22-4: “DOE encourages flexibility in designing comprehensive and specific curricula to ensure trainings are customized to meet the needs of the weatherization workforce...”

5. Organizational Culture

Can T&TA funds be used for organizational culture purposes?

Yes, T&TA funds *can be* used.

Examples of allowable activities:

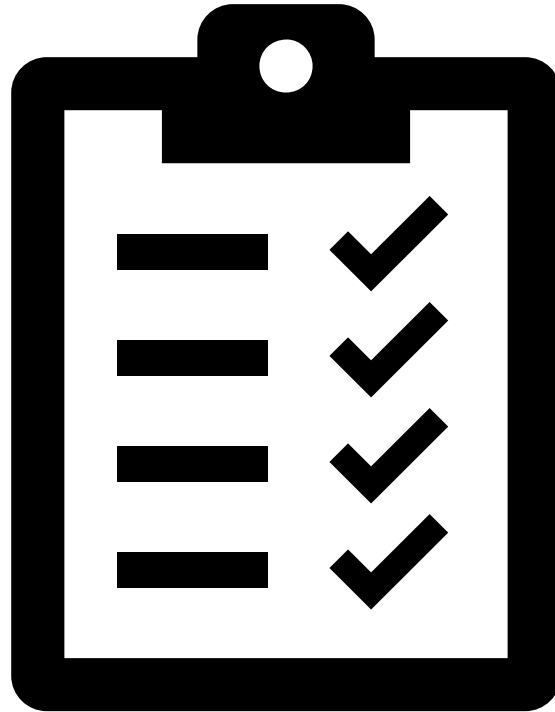
- Succession planning/change management.
- Diversity, equity, inclusion, and accessibility training activities for staff.

Requirement for T&TA plan:

The grantee/subgrantee would need to submit a comprehensive plan to DOE on the training program, outlining clearly how it supports a training/workforce need, and receive DOE approval.

Justification: These can be considered activities to support agency “workforce needs” per WPN 22-4: “DOE encourages flexibility in designing comprehensive and specific curricula to ensure trainings are customized to meet the needs of the weatherization workforce...”

Worksheet Activity (five minutes)



Discussion (15-20 minutes)

At your table, share/discuss the following:

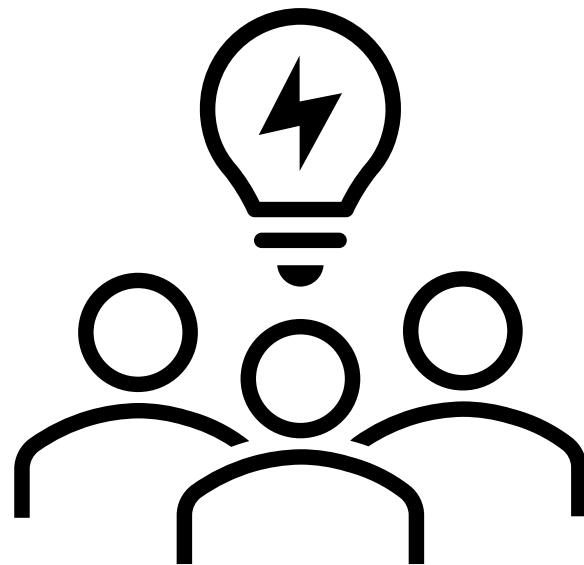
1. Based on the activity, what are your state's T&TA strengths?
2. What are your state's T&TA weaknesses/areas for opportunity?
3. Based on what you learned today, what might you consider doing differently in your next T&TA plan and why?



Image from Microsoft

Report Back (5-10 minutes)

What was one thing you heard about today that resonated with you, and that you want to take back to your agency?



Icon from Microsoft

Open Forum and Feedback Questionnaire

If you had a magic lamp and the genie was going to grant you three WAP-specific wishes:

- What programmatic element would you change?
- What process would you streamline?
- What resources would make your life easier?

Feedback Form: Leveraging T&TA
Plans to Support State Workforce
Development Needs



A satellite view of Earth at night, showing the curvature of the planet and the glowing lights of cities and continents. The sun is visible on the left horizon, creating a bright glow and lens flare effect.

Thank you!

www.nrel.gov/state-local-tribal/weatherization.html

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