

## Training and Technical Assistance (T&amp;TA)

**PLAN TEMPLATE****1.0 – GENERAL INFORMATION**

COMMENTS THAT DO NOT GENERALLY FIT INTO THE AVAILABLE TABLES BELOW

ENTER ADDITIONAL H&amp;S INFORMATION HERE

**2.0 – OVERALL T&TA PLAN**

YOUR OVERALL T&amp;TA PLAN MUST INCORPORATE SUGGESTIONS AND FEEDBACK THE FOLLOWING ELEMENTS.

**FEEDBACK FROM INTERNAL AND EXTERNAL REVIEWS, EXAMPLES INCLUDE:**

- FEEDBACK FROM DEPARTMENT OF ENERGY (DOE) PROJECT OFFICER (PO) MONITORING VISITS
- INTERNAL STATE AUDITS
- GRANTEE MONITORING OF THE SUBGRANTEES
- OFFICE OF INSPECTOR GENERAL (OIG) REPORTS
- AMERICAN CUSTOMER SATISFACTION INDEX FEEDBACK, AND
- OTHER. EXAMPLES INCLUDE:
  - TRAINING FEEDBACK
  - TRAINING RETENTION ACTIVITIES

Based upon the recommendations from the WAP Policy Advisory Council (PAC) Training and Technical Assistance Committees, the Department’s monitoring results, and ACSI survey results, the Clean Energy Center at Pennsylvania College of Technology (formerly known as the National Sustainable Structures Center) will continue to provide field training, certification, and technical assistance for all 34 weatherization subgrantees. The Clean Energy Center has moved many of the required trainings to online as recommended by the PAC. They have also been working on training videos and creating video libraries based on recommendations from the Network and PAC.

**EXISTING OR PLANNED ACCREDITED TRAINING CENTER PARTNERSHIP OR WORKING RELATIONSHIP.**

The Clean Energy Center at Pennsylvania College of Technology (formerly known as the National Sustainable Structures Center) will serve as the central hub of training operations for centralized Training Plan implementation, registration, training oversight and quality assurance, student record keeping, and reporting to the Department. All four of the Clean Energy Center’s HEP Training Programs are IREC-accredited.

**PREPARATIONS FOR FUTURE/UPCOMING PROGRAM REQUIREMENTS, EXAMPLES INCLUDE:**

- **UPDATED STANDARD WORK SPECIFICATIONS (SWS)**
- **MIGRATION TO ONLINE WEATHERIZATION ASSISTANT**

The Clean Energy Center, in conjunction with PA DCED, has updated the PA SWS Field Manual (Single Family and Manufactured Housing) to reflect the updated Standard Work Specifications (SWS) released by NREL in 2020. Upon DOE approval of the field manual, the Clean Energy Center will schedule statewide and/or regional meetings with the subgrantees to review and distribute the updated field manual.

The Clean Energy Center, in conjunction with PA DCED will be working together on the audit procedures and transition to the use of the web-based Weatherization Assistant suite of energy audit tools, NEAT and MHEA. PA requested an extension from DOE and was approved to use HEAT while working on transitioning to the new web-based audit tools. In the summer of 2021, PA as directed by DOE, will submit a request to DOE for the extension of the use of HEAT to include updated fuel and material/labor costs to be used in HEAT and will indicate the time period for the needed extension. This is of course predicated upon the final availability of the WAP Assistant tool and the necessary API development for connection into the new WAP software. The hopeful date for NEAT and MHEA use is Fall 2023. We will spend this program year, participating in the Weatherization Assistant Train the Trainer classes, learning the new tools and developing the training curriculum to teach the audit tools to the PA WAP Network in 2022.

**WHAT PROTOCOLS ARE IN PLACE WHICH ENSURE UNTRAINED STAFF ARE NOT LEFT WITHOUT SUPERVISION DURING FIELD OPERATIONS?**

The PA DCED Training Directive states that “only workers who have successfully completed all coursework in the training program for their job classification may conduct the type of work associated with that job classification.” Also, “At the agency’s discretion, trainees who have completed some of the HEP Retrofit Installer Technician and Crew Leader Training but not all, may work with adequate supervision as determined by management.” Agency training plans which include subcontractors’ information are reviewed regularly to confirm that workers performing the work have received the required trainings.

**PARTNERSHIPS WITH THE STATEWIDE HOME PERFORMANCE INDUSTRY ON TRAINING ISSUES; IF APPLICABLE.**

The PA WAP Policy Advisory Council (PAC) includes voting members from the home performance industry, including the Public Utility Commission, several public energy utilities, and representatives from PA subgrantees. Additionally, the PAC has a Training/Coordination subcommittee that is focused on training continuous improvement and working with public utilities to leverage weatherization work and training.

In 2019, the PA WAP PAC hired the Building Performance Association to manage the 2019 PA Home Performance Conference held in State College on Sept. 30-Oct 1, which was a very successful event that brought the PA WAP, public utilities, and others in the PA home performance sector together to share ideas, learn technical updates, and network. The PAC subcommittee is looking to pursue another PA Home Performance Conference in 2022.

**HOW DOES ANALYSIS CONDUCTED, AS DETAILED IN SECTION V.6 OF THE ANNUAL APPLICATION, INFLUENCE THE DEVELOPMENT OF T&TA ACTIVITIES AND PRIORITIES?**

Supplemental trainings (in addition to standard HEP training program offerings) are scheduled based on Quality Control Inspection results, technical assistance requests, monitoring results, and any agency’s (subgrantee’s) specific requests. Agency training needs are identified in their annual Training Plan submissions, and as a result of the monitoring and Risk Assessment results.

PA WAP network productivity and energy savings are critical areas to research and compare so that best practices and recommendations for training and technical assistance are identified. The Clean Energy Center at Penn College will assist DCED with this effort by reviewing a selection of audits from a technical perspective and providing written reports to PA DCED with network comparison, T&TA recommendations, and a checklist of Key Performance Indicators that can be used in the future for monitors and QCIs to review the models.

### 3.0 – WORKFORCE CREDENTIALS

DESCRIBE THE FOLLOWING ASPECTS OF YOUR T&TA PLAN RELATED TO WORKFORCE CREDENTIALS.

#### FEDERALLY REQUIRED CREDENTIALS. EXAMPLES INCLUDE:

- ENVIRONMENTAL PROTECTION AGENCY LEAD RENOVATION, REPAIR, AND PAINTING PROGRAM
- HOME ENERGY PROFESSIONALS QUALITY CONTROL INSPECTOR CERTIFICATION

HEP QCI certification has been required since 2015 for all individuals performing PA WAP QC inspections.

HEP Energy Auditor certification is only required for new and renewing QCIs; however, PA has offered and encouraged participation in HEP Energy Auditor certification testing to eligible subgrantee workers and subcontractors.

Since 2018, the HEP Retrofit Installer Technician and HEP Crew Leader certifications are not required by U.S. DOE or PA; however, completion of the HEP Retrofit Installer and HEP Crew Leader training programs are required (see Section 4.0 Training).

EPA RRP Lead Renovator certification is a required course for PA Crew Leaders. The EPA RRP initial certification course is built into the Clean Energy Center's HEP Crew Leader training program. Any PA WAP worker can take the EPA RRP Lead Renovator Initial and/or Refresher course at no cost through the Clean Energy Center, who offers both courses at least six times per year.

OSHA 10 Construction Industry is required for all PA WAP workers and subcontractors. The Department provides expense reimbursement for all subgrantee direct hires and subcontractors to complete an OSHA 10 Construction Industry training online through third party OSHA-approved training providers. OSHA 10 online course reimbursement will be administered through the Clean Energy Center, and guidance is provided on their PA Weatherization webpage: <https://www.pct.edu/business/clean-energy/pa-weatherization>.

#### GRANTEE/STATE REQUIRED CREDENTIALS. EXAMPLES INCLUDE:

- BUILDING PERFORMANCE INSTITUTE BUILDING ANALYST
- GRANTEE-DEVELOPED CERTIFICATIONS

PA HOME IMPROVEMENT CONTRACTOR (HIC) REGISTRATION AND NUMBER THROUGH PA AUDITOR GENERAL'S OFFICE

#### SUBGRANTEE/LOCAL REQUIRED CREDENTIALS. EXAMPLES INCLUDE:

- CONTRACTOR LICENSING

BUILDING PERMITS ARE REQUIRED IN CERTAIN AREAS OF PA

LOCAL ORDINANCES REQUIRE PROFESSIONAL LICENSING SUCH AS LICENSED ELECTRICIANS AND PLUMBERS FOR SOME WORK

#### INDUSTRY REQUIRED CREDENTIALS. EXAMPLES INCLUDE:

- EQUIPMENT/MATERIAL MANUFACTURE CERTIFICATION
- VENDOR CERTIFICATION  
(E.G. EQUIPMENT/MATERIAL MANUFACTURE CERTIFICATION, VENDOR CERTIFICATION)

N/A

#### PROCESS FOR MAINTAINING WORKFORCE CREDENTIALS

Worker certification is awarded at the national level through certification exams maintained by the Building Performance Institute.

HEP certification testing is administered by BPI Test Centers approved to proctor each specific HEP exam. The Clean Energy Center at Penn College is a BPI Test Center and will serve as the central hub for providing HEP certification testing, as their facility and proctors have been approved by BPI to conduct certification testing for all four HEP job classifications. As in previous years, the Clean Energy Center will offer HEP Energy Auditor and HEP QCI certification testing at no cost to eligible PA WAP workers and subcontractors.

#### HOW CREDENTIALS ARE TRACKED

Worker HEP certification is tracked on each subgrantee's Training Plan. The number and names of the QCIs for each agency are collected at least annually during the Risk Assessment process, during the annual monitoring visits and as part of each agency Training Plan. QCI names are tracked through the Clean Energy Center and can be found at the BPI website. Each weatherization agency has at least one QCI as a direct hire employee and/or subcontracted.

## 4.0 – TRAINING

GRANTEES HAVE TWO OPTIONS TO DESCRIBE THEIR TRAINING.

- A) USE THE EMBEDDED SPREADSHEET\* TO IDENTIFY AND DESCRIBE THE TRAINING SCHEDULE FOR GRANTEE AND SUBGRANTEE STAFF. INCLUDE TECHNICAL AND NON-TECHNICAL TRAINING.
- B) OR USE THE FIELDS BELOW TO IDENTIFY AND DESCRIBE THE TRAINING SCHEDULE FOR GRANTEE AND SUBGRANTEE STAFF. INCLUDE TECHNICAL AND NON-TECHNICAL TRAINING.

GRANTEE'S ARE TO INCLUDE THE FOLLOWING IN THEIR DESCRIPTIONS REGARDLESS OF WHAT OPTION IS BEING USED TO DESCRIBE THEIR TRAINING PLAN:

- SPECIFY WHETHER ATTENDANCE IS MANDATORY, AND THE RAMIFICATIONS FOR NON-COMPLIANCE.
- SPECIFY IF THE T&TA PLAN SPANS MULTIPLE PROGRAM YEARS (PY), INDICATE WHICH TRAININGS ARE INTENDED IN THE CURRENT PY AND WHICH ARE PLANNED FOR FUTURE PYS.

\* THE EMBEDDED SPREADSHEET, IF COMPLETED AT THE END OF THE YEAR TO RECORD DELIVERED TRAINING, CAN BE USED AS DOCUMENTATION FOR THE REQUIRED ANNUAL T&TA REPORT. DOUBLE CLICK TO OPEN SPREADSHEET. ENTER INFORMATION AND CLOSE. IT WILL AUTOMATICALLY SAVE YOUR INFORMATION



### TTA Planning and Reporting Template F

#### PROGRAMMATIC/ADMINISTRATION TRAINING

- FINANCIAL (I.E. 2 CFR 200)
- MANAGEMENT (I.E. 10 CFR 440)

Periodically, the Department organizes and conducts formal statewide weatherization meetings, workshops, and webinars or conference calls for the purpose of addressing subgrantee training needs and pertinent monitoring findings as well as sharing information with/among the staff of subgrantees themselves and the Department staff. The number of sessions range from two (2) to four (4) times during the contract period, depending on problems identified and/or issues needing to be addressed. Subgrantees, participants, and sometimes outside consultants are used as instructors, panel members, and group leaders.

Subgrantees are expected to make every effort to have at least one representative participate in all statewide weatherization meetings, workshops, and webinars or conference calls.

All PA WAP Subgrantee Leadership staff are strongly encouraged to complete the free Weatherization Assistance Program (WAP) Administrative trainings available at <https://wap.litmos.com/>.

All PA WAP Subgrantee Leadership will be invited to attend a Managing Project Management course series provided at Penn College of Technology aligned with Project Management Institute’s (PMI)® Project Management Body of Knowledge (PMBOK® Guide). This course series prepares project managers to sit for the PMI exam/credential Certified Associate in Project Management (CAPM)®.

**COMPREHENSIVE TECHNICAL TRAINING ALIGNED TO THE JOB TASK ANALYSIS (IDENTIFY AT WHAT INTERVALS WORKERS WILL RECEIVE REGULAR, COMPREHENSIVE TRAINING AS REQUIRED BY WEATHERIZATION PROGRAM NOTICE (WPN) 15-4)**

- QUALITY CONTROL INSPECTOR
- ENERGY AUDITOR
- CREW LEAD
- RETROFIT INSTALLER/TECHNICIAN

Comprehensive training is occupation-specific training which follows a curriculum aligned with the JTA for that occupation. In the PA WAP, Comprehensive training is defined as the Home Energy Professional Training Programs, plus PA-specific training requirements for heating subcontractors.

The table below outlines the course requirements for each job classification.

**PA WAP Training Requirements for New Workers, per Job Classification – PY 2021/22**

HVAC Sub-contractor	Home Energy Professional (HEP) Job Classifications				Required Coursework	# Contact Hours	Delivery
	Retrofit Installer	Crew Leader†	Energy Auditor	QCI*			
X	X		X		OSHA 10 Construction Industry	10	online, self-paced
X					PA Weatherization Program Fundamentals (BPX 101)	9	online, self-paced
	X				HEP Retrofit Installer (HEP 150)	37	blended online and lab, in-person
		X			HEP Crew Leader (HEP 250)	58	blended online and lab, in-person
			X		HEP Energy Auditor (HEP 350)	114	blended online and lab, in-person
				X	HEP Quality Control Inspector (BPX 400)	4	online, self-paced

† Crew Leaders must successfully complete all Retrofit Installer coursework before starting Crew Leader coursework.

\* QCIs must successfully complete all Energy Auditor coursework before starting the QCI course.

The training requirements listed in the table above may be adjusted throughout the year in order to align training with national efforts as well as to include any additional PA WAP requirements.

HEP job classification training programs require the successful completion of a combination of online coursework and hands-on application that covers all of the competencies defined in the Job Task Analysis.

New employees/subcontractors must begin the process for coursework registration within 60-90 days of their start date. The longest training program (Energy Auditor) is designed to be completed in less than four months, assuming the worker can commit to a rapid training schedule. All required coursework must be completed within one year. Training standards and program requirements are subject to change.

Any non-compliance with training requirements is noted as part of subgrantee Risk Monitoring activities that the Department conducts annually.

The Clean Energy Center at Pennsylvania College of Technology will serve as the central hub of training operations for centralized Training Plan implementation, registration, training oversight and quality assurance, student record keeping, and reporting to the Department.

At the time of this plan, an exact schedule has not yet been developed; the training course schedule for 2021/22 will be developed based on historical enrollment and feedback from Agencies and PA DCED. Each HEP Training Program will be offered a minimum of six times throughout the year at the Clean Energy Center's two lab sites in Williamsport and Latrobe, PA.

The Department provides travel expense reimbursement for all Subgrantee direct hires and subcontractors to attend required in-person Comprehensive Training. Reimbursement is provided through the Clean Energy Center, and guidance is provided on their PA Weatherization webpage: <https://www.pct.edu/business/clean-energy/pa-weatherization>.

#### SPECIFIC TECHNICAL TRAINING

- TOPICS IDENTIFIED DURING MONITORING VISIT(S)
- ENERGY MODELING
- HEALTH & SAFETY. ALL H&S TOPICS IN WPN 17-7 REQUIRE SOME LEVEL OF TRAINING FOR ALL AFFECTED WORKERS, THE FREQUENCY OF THIS TRAINING IS A GRANTEE DECISION. EXAMPLES INCLUDE:
  - AIR CONDITIONING AND HEATING SYSTEMS
  - ASBESTOS
  - BIOLOGICALS AND UNSANITARY CONDITIONS
  - BUILDING STRUCTURE AND ROOFING
  - CODE COMPLIANCE
  - COMBUSTION GASES
  - ELECTRICAL
  - FORMALDEHYDE, VOLATILE ORGANIC COMPOUNDS (VOCs), FLAMMABLE LIQUIDS, AND OTHER AIR POLLUTANTS
  - FUEL LEAKS
  - GAS RANGE/OVENS
  - HAZARDOUS MATERIALS DISPOSAL
  - INJURY PREVENTION OF OCCUPANTS AND WEATHERIZATION WORKERS
  - LEAD BASED PAINT
  - EPA'S LEAD RENOVATION, REPAIR & PAINTING PROGRAM (RRP)
  - MOLD/MOISTURE
  - PESTS
  - RADON
  - SAFETY DEVICES

- VENTILATION AND INDOOR AIR QUALITY
  - AMERICAN SOCIETY OF HEATING REFRIGERATION AND AIR-CONDITIONING ENGINEERS (ASHRAE)
- WINDOW REPAIR, DOOR REPAIR
- WORKER SAFETY
  - OSHA
- CLIENT EDUCATION (TRAINING WORKERS TO CONDUCT CLIENT EDUCATION). EXAMPLES INCLUDE:
  - ENERGY SAVINGS STRATEGIES
  - PROGRAM-SPECIFIC INFORMATION. EXAMPLES INCLUDE:
    - WHAT TO EXPECT
    - ADDITIONAL RESOURCES
  - HEALTH & SAFETY ISSUES

Specific Technical Training is required in the form of regular training refreshers for all PA WAP workers to keep up with new technical standards and important program updates.

Training refresher requirements for 2021/22 for the PA WAP consist of the following for each job classification:

**PA WAP Update/Refresher Training – PY 2021/22**

HVAC Sub-contractor	Home Energy Professional (HEP) Job Classifications				Required Coursework	# Contact Hours	Delivery
	Retrofit Installer	Crew Leader <sup>†</sup>	Energy Auditor	QCI*			
X	X	X	X	X	PA WAP Training and Field Manual Update	2	online, live webinar
X	X	X	X	X	PA WAP Health and Safety <i>Required every three years.</i>	~10	online, live weekly webinar series
		X	X	X	CAZ Refresher – BPI 1200-2017 Standard <i>Required ever three years. Workers that completed CAZ training after 6/30/19 are exempt until PY 2022-23.</i>	2	online, self-paced
		X	X	X	Client Education <i>Required every three years.</i>	2	online, live webinar

**Energy Modeling:**

Energy Modeling training is built into the Clean Energy Center’s HEP Energy Auditor training program, is available at no cost to any Subgrantee direct hire and/or subcontractor and has been a required refresher course for existing Energy Auditors since 2019.

**Health and Safety:**

Health and Safety topics are built into the Clean Energy Center’s HEP training programs and are aligned with the national Standard Work Specifications; however, the PA WAP Health and Safety webinar series listed in the Refresher Training table above will cover each of the H&S topics in WPN 17-7 in-depth, and will be offered live at least once per year through the Clean Energy Center. The webinar series will be recorded and made available to anyone unable to participate in live sessions. Some examples of information that is provided in the Health and Safety HEP training programs and specific Health and Safety webinars are listed below:

- AIR CONDITIONING AND HEATING SYSTEMS- Licensing and/or certification for HVAC installers is required by authority having jurisdiction(AHJ).
- ASBESTOS- If required by AHJ, licensing/certification for removal and reinstallation of asbestos siding must be utilized.
- BIOLOGICALS AND UNSANITARY CONDITIONS- COVID-19 WORKPLACE SAFETY IS DISCUSSED AS CHANGES TO THE PROTOCOL ARE UPDATED BY CDC AND PA STATE DEPARTMENT OF HEALTH GUIDELINES.

- BUILDING STRUCTURE AND ROOFING- Training will be conducted to review how to identify structural and roofing issues.
- CODE COMPLIANCE- Workers are trained to determine the proper pathway for code compliance and to follow manufacturer's installation guidelines.
- COMBUSTION GASES- HEP Crew Leader and Energy Auditor training covers CAZ testing according to BPI 1200 Standards. How to perform combustion appliance safety inspection for vented appliances. Training covers the difference between air free and as -measured CO, as well as CO action levels.
- ELECTRICAL - Local (or AHJ) electrical code compliance is taught in HEP Crew Leader and Energy Auditor training
- FORMALDEHYDE, VOLATILE ORGANIC COMPOUNDS (VOCs), FLAMMABLE LIQUIDS, AND OTHER AIR POLLUTANTS- How to recognize potential hazards and when removal is necessary.
- FUEL LEAKS- Fuel leak testing is provided in current required Crew Leader and Energy Auditor training as part of the Advanced Diagnostics, CAZ testing and the upcoming required HEP Crew Leader and Energy Auditor training
- GAS RANGE/OVENS- Inspection techniques and CO action levels are covered in HEP Energy Auditor training
- HAZARDOUS MATERIALS DISPOSAL- PA will not provide training on refrigerant disposal but will require that subgrantees hire a universally certified or EPA-approved section 608 type I certified worker or subcontractor to recover refrigerant. Appropriate Personal Protective Equipment (PPE) for working with hazardous waste materials, disposal requirements and locations and the health and environmental risks related to hazardous materials is taught in HEP Retrofit Installer technician and Crew Leader training. An EPA Certified Lead Renovator must be utilized on units as required by EPA Guidelines.
- INJURY PREVENTION OF OCCUPANTS AND WEATHERIZATION WORKERS- Inspect for dangers which would prevent weatherization. Hazard identification is taught in OSHA courses.
- LEAD BASED PAINT/EPA'S LEAD RENOVATION, REPAIR & PAINTING PROGRAM (RRP)- An EPA Certified Lead Renovator must be utilized on all completed units as required by EPA guidelines. EPA Certified Lead Renovator training is required for any worker that would fulfill the role of a Certified Renovator. Certified Renovators must provide jobsite training to crews regarding lead safety when installing measures. In addition, State Monitors and Quality Control Inspectors are required to be EPA Certified Lead Renovators.
- MOLD/MOISTURE- HEP Energy Auditor training covers how to address moisture and indoor air quality issues. In addition, workers are trained to determine the proper pathway for code compliance.
- PESTS- How to assess the presence and degree of infestation, associated risk and deferral policy is taught.
- RADON- Retrofit Installer Technicians are trained in proper vapor barrier installation. Energy Auditors are trained to have the knowledge of radon, what it is and how it occurs, including what factors may make radon worse and the precautionary measures that may be helpful.
- SAFETY DEVICES- WORKERS ARE TRAINED THE proper pathways for code compliance and to keep a copy of all local codes in their records.
- VENTILATION AND INDOOR AIR QUALITY- Current ASHRAE 62.2-2016 guidance is taught and reviewed.
- WORKER SAFETY/OSHA - PA requires weatherization workers to receive appropriate OSHA training. OSHA 10 is required for all weatherization Retrofit Installer Technicians, Energy Auditors, and Quality Control Inspectors.



All PA WAP Subgrantees are strongly encouraged to complete the COVID-19 Workplace Safety 2020 e-learning course offered at no cost at <https://wap.litmos.com/>.

Client Education:

Consumer Education topics are covered in the Clean Energy Center's courses for all job classifications; however, a Client Education refresher webinar is required as shown in the Refresher Training table above. It will include: Describing the Energy Audit process, interviewing the client about how they use energy in their homes, potential deferral situations and educating clients about health and safety issues when applicable. Pointers on how to save energy such as: [more-100-ways-save-on-bill.ashx \(consumersenergy.com\)](https://www.consumersenergy.com/more-100-ways-save-on-bill) or a brochure called 100 ways to save on your electric bill.



100waysbrochure.pdf

Workers will be provided with suggestions for how to provide Client Education to include information about all measures installed, the care and maintenance, as applicable and also all Manufacturer's warranty information.

#### CONFERENCES. EXAMPLES INCLUDE:

- ENERGY OUTWEST
- BUILDING PERFORMANCE ASSOCIATION
- NATIONAL ASSOCIATION FOR STATE AND COMMUNITY SERVICE PROVIDERS
- COMMUNITY ACTION PARTNERSHIP

Continuing Education is optional, but strongly encouraged for all PA WAP leadership and workers. Examples of Continuing Education opportunities include:

1. Leadership, teamwork, and communication trainings
2. WAP sponsored Program Administrator trainings
3. BPI Building Analyst, Healthy Home Evaluator, and other related industry credentials
4. Electrical safety
5. Trainings on computer programs (Microsoft Word, Excel, PowerPoint, etc.)
6. Periodic PA WAP sponsored regional meetings
7. NASCSP Conferences
8. Home Performance Coalition Regional and National Conferences
9. Any other DOE-approved Conferences
10. Other pertinent trainings upon approval from DCED prior to attendance, as per the PA WAP Continuing Education Guidelines.

The Department provides expense reimbursement for each Subgrantee (direct hires and subcontractors) to participate in approved Continuing Education opportunities, such as conferences and relevant professional development training. Continuing education reimbursement requires Department preapproval and includes expenses such as registration, exams, course materials, transportation/mileage, lodging, and meals.

The Department has assigned the Clean Energy Center as the designated clearinghouse for receiving and processing Continuing Education requests, issuing reimbursement funds, and tracking Continuing Education expenditures per Subgrantee. guidance is provided on their PA Weatherization webpage:

<https://www.pct.edu/business/clean-energy/pa-weatherization>.

Utilizing an expense management software, the Clean Energy Center and the Department work together through an approval process to review the agency/subgrantee Continuing Education requests. There is an initial

allowance of Continuing Education funds per agency for eligible trainings, but the amount is adjusted in the second half of the year depending on the number and amounts associated with the requests. The approval process and designated amount of Continuing Education training funds help to ensure that the DOE T/TA funds are spent timely and appropriately.

**OTHER, PLEASE SPECIFY:**

The Department will be considering providing DOE T/TA funds directly to each agency. These funds will be allocated to each agency to utilize as wages for their staff to attend Continuing Education training and conferences. These funds can only be used for wages when no other funds are available to support the staff members during that time.

**5.0 – TECHNICAL ASSISTANCE**

DESCRIBE THE TECHNICAL ASSISTANCE ACTIVITIES INCLUDED IN THE T&TA BUDGET CATEGORY.

**PROGRAMMATIC/ADMINISTRATION SUPPORT**

T/TA funds are not budgeted for programmatic and administration support

**TECHNICAL SUPPORT**

As the technical assistance provider, the Clean Energy Center will serve as the primary technical resource to the PA WAP, including serving as the administrator of the “Wx Tech Team” email (the clearinghouse for technical questions from the field) and will communicate regularly with DCED state monitoring staff to share technical questions and answers. Questions and answers from the Wx Tech Team email are compiled, scrubbed of subgrantee-specific information, and distributed to all subgrantees on the Department’s SharePoint site.

The Clean Energy Center will schedule a technical assistance field mentoring visit with each agency (subgrantee), preferably an in-progress visit before the final inspection, to gather best practices, provide technical feedback, and identify any training gaps for continuous improvement. If an in-person visit is not possible, a virtual technical assistance meeting will be conducted. Activities will involve reviewing use of the PA SWS Field Manual, standardized PA QCI checklist, overall audit procedure, relevant national Standard Work Specifications, the desired outcomes of energy efficiency measures, and workforce succession planning. Clean Energy Center staff will work with individual agencies to discuss strengths noticed during the inspection and identify and discuss areas for improvement in order to pass QC inspections. The overall goal is to provide feedback to improve fieldwork and processes specific to each agency in order to increase the number of successful inspections as well as identify potential strategies for workforce planning.

**HEALTH & SAFETY SUPPORT ACTIVITIES**

The PA WAP Health and Safety webinar series listed in Section 4.0 Training (Refresher Training table) will provide Subgrantees with in-depth training for each of the H&S topics in WPN 17-7.

The Clean Energy Center will assist PA DCED in developing, maintaining, and distributing a Hazard Communications Plan toolkit with templates and guidance for Subgrantees to utilize.

PA DCED has identified some agencies that could benefit from assistance in further developing their Continuity of Operations Planning (COOP) and Emergency Planning. Clean Energy Center and DCED will work together at providing guidance in COOP planning.

Subgrantee workers and subcontractors are encouraged to reach out to their state monitor or the Wx Tech Team email (Clean Energy Center) to ask questions and receive answers regarding any health and safety topic.

**MONITORING**

**WHAT PERCENTAGE OF T&TA FUNDING IS ALLOCATED TO MONITORING? (IF DEFINED IN SECTION B OF THE BUDGET DETAILS WITHIN THE ANNUAL APPLICATION, INCLUDE THAT WITHIN YOUR DESCRIPTION BELOW.)**

20%

**OTHER, PLEASE SPECIFY**

The Clean Energy Center will continue providing technical expertise, workflow guidance, and on-site recommendations to Agencies pursuing multifamily projects.

The Clean Energy Center will provide continuous improvement and distribution of the 2021 PA SWS Field Manual for Single Family and Manufactured Housing. This includes technical support regarding updates to field manual addendums, such as a photo checklist, standardized process for conducting an audit, and other critical technical documents needed for the field.

The State Quality Control Inspector’s monitoring activities are supported by approximately 20% of the overall T/TA budget. The funds cover the personnel costs, benefits and indirect costs.

**6.0 CLIENT EDUCATION**

**DESCRIBE WHAT CURRENT AND PLANNED CLIENT EDUCATION MATERIALS AND/OR ACTIVITIES ARE INCLUDED IN THE T&TA BUDGET CATEGORY. ONLY THOSE PAID FOR WITH T&TA FUNDS NEED TO BE MENTIONED.**

**NOTE: THIS DOES NOT INCLUDE TRAINING WORKERS TO DELIVER CLIENT EDUCATION. THIS SHOULD BE DESCRIBED IN THE TRAINING SECTION, ABOVE.**

CLIENT EDUCATION ACTIVITIES PRIOR TO, DURING AND AFTER WEATHERIZATION WHICH ADDRESS THE WEATHERIZATION PROCESS AND ENERGY SAVINGS DETAILS

Agencies are required to provide Energy Education as part of weatherization service and must document this activity as part of the client signoff.

Client education includes but is not limited to:

- A review of the measures installed and how to maximize their potential benefit;
- The relationship between individual behavior and energy savings and comfort;
- The anticipated effect of the weatherization treatment on energy use;
- Information on activities the client can do that is not related to weatherization measures installed to save energy.

CLIENT EDUCATION ACTIVITIES REGARDING H&S ISSUES AS INDICATED IN WPN 17-7

- AIR CONDITIONING AND HEATING SYSTEMS
- ASBESTOS
- BIOLOGICALS AND UNSANITARY CONDITIONS
- BUILDING STRUCTURE AND ROOFING
- CODE COMPLIANCE
- COMBUSTION GASES
- ELECTRICAL

- FORMALDEHYDE, VOLATILE ORGANIC COMPOUNDS (VOCs), FLAMMABLE LIQUIDS, AND OTHER AIR POLLUTANTS
- FUEL LEAKS
- GAS RANGE/OVENS
- HAZARDOUS MATERIALS DISPOSAL
- LEAD BASED PAINT
- MOLD/MOISTURE
- PESTS
- RADON
- SAFETY DEVICES
- VENTILATION AND INDOOR AIR QUALITY
  - AMERICAN SOCIETY OF HEATING REFRIGERATION AND AIR-CONDITIONING ENGINEERS (ASHRAE)
- WINDOW REPAIR, DOOR REPAIR

When conducting a whole-house standardized energy audit and informing clients of audit information and possible health and safety hazards, subgrantees must follow the H&S guidance provided in BPI's ANSI-BPI-1100-T-2014 Home Energy Auditing Standard sections 2.1.2, 2.2.4, section 3 and section 6.2.1. Section 03. Health and Safety Related Requirements (BPI-1100-T-201x).

**AIR CONDITIONING AND HEATING SYSTEMS--** When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to provide clients with education on maintenance and use of the new or repaired heating system. Paperwork and manuals for any installed equipment must be provided. Subgrantees are required to inform clients of the dangers of unvented space heaters – Carbon Monoxide (CO), moisture, and NO2. CO can be dangerous even if CO alarm does not sound.

**ASBESTOS--** When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to inform clients in writing that asbestos containing materials are suspected to be present and what precautions will be taken. There is a sample form to be used when notifying the client about the possibility of asbestos. Please see attached Asbestos Form (Attachment K). If professional testing was conducted with other funds, the client must be formally notified in writing of the test results.

Homes may be deferred because of the presence of vermiculite, if a blower door depressurization test cannot be done. Subgrantees are required to instruct clients not to disturb suspected asbestos-containing material, to provide clients with asbestos safety information, and to formally notify clients in writing (and acquire a client signature) if test results reveal a high probability that the tested vermiculite contains dangerous levels of asbestos. Please see attached Asbestos Form (Attachment K). Actual test results must be shared with client. Client must provide documentation that a certified professional performed the removal or remediation in cases where the home was deferred due to ACM and then later approached for weatherization.

**BIOLOGICALS AND UNSANITARY CONDITIONS--** When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to inform clients of problematic conditions observed and to provide clients with information on how to maintain a sanitary home. If the home is deferred due to unsanitary conditions, subgrantees are required to provide the client with the steps necessary to correct the unsanitary conditions.

**BUILDING STRUCTURE AND ROOFING, CODE COMPLIANCE, COMBUSTION GASES --** When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to inform clients of problematic conditions observed and to provide clients with information on how to fix the issue in order for weatherization to commence.

**ELECTRICAL--** When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to provide clients with information on overloading circuits and electrical safety/risks.

FORMALDEHYDE, VOLATILE ORGANIC COMPOUNDS (VOCs), FLAMMABLE LIQUIDS, AND OTHER AIR POLLUTANTS-- When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to inform clients in writing of any observed conditions and associated risks, and to provide clients with written materials on safety and proper disposal of household pollutants.

FUEL LEAKS-- When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to inform clients in writing of detected fuel leaks and associated risks.

GAS RANGE/OVENS-- When deferral is necessary, PA's deferral policy must be followed. Clients must be informed of the importance of keeping burners clean to limit the production of CO.

HAZARDOUS MATERIALS DISPOSAL-- When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to inform clients in writing of hazards associated with hazardous waste materials being generated/handled in the home. Subgrantees are required to educate clients not to disturb refrigerator.

LEAD BASED PAINT-- When deferral is necessary, PA's deferral policy must be followed. Follow applicable DOE, and EPA RRP guidance on occupant safety, occupant education and removal and disposal procedures.

PA is in compliance with the EPA RRP requirements of client education. Lead Paint Notification, Lead Hazard Education, and EPA Lead Paint Pamphlet Sign-offs Link to Pamphlet: <https://www.epa.gov/lead/renovate-right-important-lead-hazard-information-families-child-care-providers-and-schools>

MOLD/MOISTURE-- When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to inform clients of the importance of cleaning and maintaining drainage systems and proper landscape design. PA is in compliance with the mold and moisture requirements of client education, providing the client notification and disclaimer on mold and moisture awareness. Please see attachments, Whole House Moisture Assessment Form (Attachment I) and Weatherization Mold Assessment Form (Attachment J).

PESTS-- When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to inform clients of observed conditions and associated risks.

RADON-- When deferral is necessary, PA's deferral policy must be followed. Subgrantees will be required to provide all clients with the EPA's consumer's guide to radon. Radon Information Form attached (Attachment M). EPA's "A Citizen's Guide to Radon", found at [https://www.epa.gov/sites/production/files/2016-02/documents/2012\\_a\\_citizens\\_guide\\_to\\_radon.pdf](https://www.epa.gov/sites/production/files/2016-02/documents/2012_a_citizens_guide_to_radon.pdf).

SAFETY DEVICES-- When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to provide clients with verbal and written information on use of smoke/CO alarms. Clients with solid fuel heating are encouraged to acquire a fire extinguisher, whether through an alternate program or by spending their own funds.

VENTILATION AND INDOOR AIR QUALITY (AMERICAN SOCIETY OF HEATING REFRIGERATION AND AIR-CONDITIONING ENGINEERS (ASHRAE) )-- When deferral is necessary, PA's deferral policy must be followed. Subgrantees are required to provide clients with information on function, use, and maintenance of any ventilation systems and components, along with a disclaimer stating that current ASHRAE 62.2-2016 standards do not account for high polluting sources or guarantee indoor air quality.

WINDOW REPAIR, DOOR REPAIR-- Clients are provided with information on lead risks associated with the repair of windows/doors.