WEATHERIZATION ASSISTANCE PROGRAM

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

WEATHERIZATION WORKS
U.S. Department of Energy

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

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INTRODUCTION

Following the completion of the 2019 American Consumer Satisfaction Index (ACSI) survey on the Weatherization Assistance Program (WAP), the U.S. Department of Energy (DOE) collaborated with contractors and WAP partners to undertake a systematic effort to analyze the root causes of Training & Technical Assistance (T&TA) issues and develop solutions to assist Grantees, Subgrantees and Training Centers. From this effort, a series of training resources and tools were created to:

- Ease the administrative burden for WAP Grantees and Subgrantees.
- Improve consistency of T&TA requests across the network.
- Ensure trainings are customized to meet Grantee-specific needs.

This **Request for Proposals (RFP) Toolkit for Training & Technical Assistance (T&TA) Services** was part of this effort. This resource is designed to enhance and improve WAP Grantees' and Subgrantees' requests for training, with the examples focused on the currently more common single training request (versus a multi-training contract).

WHAT THIS TOOLKIT IS

The first part of the toolkit provides an overview of the scope of work and other things to consider when developing an RFP or **Request for Qualifications (RFQ)**, the second section provides detailed descriptions of the elements to include in the scope of work and the questions to be asking yourself or your team, and the final section provides three (3) examples of the scope of work section of RFPs for technical training.

The goal is that T&TA requests include enough accurate information to ensure they receive comparable proposals from training providers and ultimately are able to select the most appropriate training for their needs.

WHAT THIS TOOLKIT IS NOT

Your training solicitation must have the federal and Grantee-required elements and format of any solicitation issued by your organization. These include general requirements, solicitation timeline, criteria for selection and terms and conditions. The criteria for selection (e.g., will selection be based on the lowest cost bid, or will you develop scoring criteria that considers factors other than cost?) is especially important for training entities to know, so be sure that part is clear and provides adequate detail. This toolkit will not delve into this material, as it can vary by Grantee and organization, and ACSI and other data indicated no issues related to these elements of T&TA planning. If you need financial training, please visit WAP's Financial Training Toolkit on 2 CFR 200.

TIP:

Make sure to follow all relevant state and federal guidelines for procurement.

See 2 CFR § 200 for federal policies.

Scope of Work

This RFP Toolkit will assist in drafting a Scope of Work tailored to your organization's specific training needs, informed by work quality data and other metrics**.**

The **Scope of Work** is a section of your purchasing request document that describes:

- **WHAT** type of training you want.
- **WHEN** you want the training.
- **WHO** will be in attendance.

A detailed scope of work is critical to obtain the training and technical assistance your WAP network needs, and allows you to compare "apples to apples" when evaluating proposals, bids or quotes for services.

An adequately detailed scope of work includes information on these aspects of a training, all of which are detailed later in the toolkit:

- 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

The intent of this RFP Toolkit is to provide a starting point to draft a scope of work that can be inserted into a request for services, proposal or other purchasing document. Regardless of the type of procurement or purchase, it is critical to include the detailed scope of work elements to ensure a successful training session.

Other Tips & Considerations

In addition to a detailed scope of work, below are a few other considerations for purchasing T&TA services.

RESPONSE TIMEFRAME

To improve the responses to your RFP, RFQ or purchasing request, allow enough time for training providers to prepare a proposal. For a single training request (see the examples below), a minimum response timeframe of **one month is recommended** (the proposal due date is one month from the date of publication/receipt).

TIMING OF TRAINING DELIVERY

Training center availability varies depending on factors such as other T&TA commitments, staffing levels, state and national conferences, etc. A survey of training centers conducted in June 2019 showed, on average, **training centers book T&TA activities 3 months in advance,** though shorter-term specific training needed one time can sometimes be developed and ready for delivery more quickly.

Knowing this critical factor, it is important to be realistic when requesting the training delivery. For example, below in Figure 1 is a sample timeline for solicitation and delivery of a single, comprehensive training.

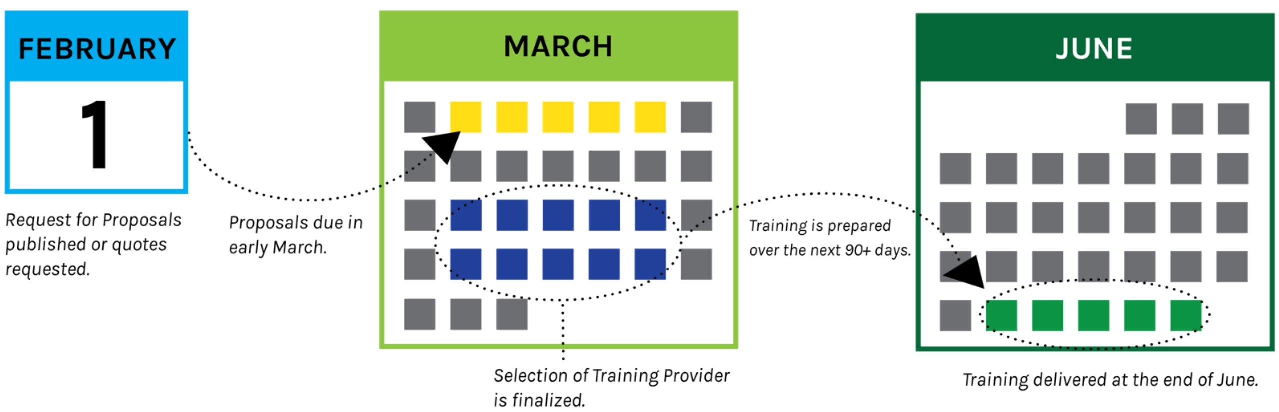

Figure 1: Example of training solicitation and delivery timeline

> **NOTE:**
>
> *Including a training needs analysis and/or customization of the training curriculum will likely extend this timeline.*

GRANTEE-SPECIFIC WAP BACKGROUND

Your RFP or RFQ should include specific background on your state or territorial weatherization program that can influence the content of your training.

Specifically, we recommend including program details such as:

- **Any special non-DOE specific certification requirements** - i.e., State-level certification programs.
- **Housing types** – predominately single family, under 20% multi-family, manufactured homes, etc.
- **Typical housing characteristics** - slab on grade, conditioned basements, etc.
- **Fuel types –** gas, electric, propane, oil, etc.
- **Typical Equipment** – the type of heating/cooling systems, water heaters, etc. that are most prevalent in your service territories.
- **Number of WAP Subgrantees in your network.**

And if not included in the "Standards" section below, be sure to include here:

- **Software tool used for building analysis (when applicable) –** e.g., NEAT/MHEA with State-specific rules.
- **Links to current State Field Guide and Weatherization Program Administrative Manual.**

This information is typically in a stand-alone section of the RFP and is an important supplement to the scope of work.

INNOVATION

Unless you will be required to select the lowest-cost proposal, regardless of quality, allow enough flexibility for innovation from your respondents – they are the training experts! One way you can do this is by allowing proposers to offer an alternative approach as a separate section, and an alternative budget.

SCOPE OF WORK ELEMENTS

The RFP Scope of Work contains detailed specifications describing the services you require to be provided by the contractor. Training providers will use this information to develop a project proposal and budget.

Below are the topical elements to use as you draft your Scope of Work specifications.

TYPE OF TRAINING & AUDIENCE

Describe in detail the type of training needed. Make sure to include any Job Task Analyses (JTA) upon which the training or curriculum should be based and the number of participants that will attend.

Who will attend the training? Is the training audience Grantee technical staff, Subgrantee auditors, or a mix of seasoned and new crew members and contractors?

It is important to provide as much detail on the participants' levels of experience (i.e., beginner or intermediate/advanced or years of service) and their WAP network roles (e.g., crew member, crew leader, auditor; Subgrantees and/or Grantee staff).

TIP:

If you are struggling to describe the specific training details needed for your situation, reach out to these groups for support and ideas!

NASCSP – WAP Grantee-level support

CAP - WAP Subgrantee-level support

STANDARDS

Identify and describe the state and federal standards that will be the basis of the training.

EXPERIENCE AND CERTIFICATIONS

Specify the experience level, topical expertise and certifications you require of a trainer.

NEEDS ASSESSMENT AND TRAINING GOALS

There are two scenario options: Either you can detail the available information from a needs assessment you completed or you can include specifications for what the proposer will be responsible for regarding identifying training needs and goals (e.g., surveying Subgrantees in advance of curriculum development, reviewing past work products or monitoring reports).

Information supporting the need for training can be identified by:

- Referring to a completed needs assessment in the Grantee Application Package/Plan.
- Needs assessment conducted by a training provider. This can be included in your RFP if it is specific to the audience and training being requested. (If a full State training needs assessment is desired, that could be its own RFP or part of a longer-term training RFP.)
- Analysis of quality and evaluation data for work and workers conducted at the agency or Grantee level.

TRAINING DELIVERY

What training formats are most effective for your workers?

Would they benefit from attending an in-person or instructor-led training?

Or would another format, such as asynchronous, self-paced online training, be more effective and efficient? Will you send workers off site or bring the training to them? When ideally should the training occur?

If you anticipate having a trainer travel to your state for a Subgrantee Network training, consider specifying Grantee Technical Assistance in your request for services. This is a great way to debrief after the Subgrantee training, review evaluations, identify future training needs, and discuss any technical questions you have about your state policies and program.

TIP:

*Most Weatherization Training Centers are **booked 2 to 3 months in advance**. Ideally your request should be made at least 4 months in advance of the desired training date, especially if you are requesting significant training or curriculum development.*

FREQUENCY AND LENGTH OF TRAINING

What is your expectation for the duration of the training? Do you need a one-time statewide training or do you need the training repeated at several locations across your state or region?

Providing specific and detailed expectations, such as the anticipated total number of hours or days will assist the training entities to provide the best options to meet your needs.

CURRICULUM DEVELOPMENT & TRAINING PREPARATION

Having a customized curriculum for your network ensures the training will meet your network's needs. Customized curriculum development is time-consuming and expensive. If your network requires this, it is critical to provide clear guidance in your RFP or RFQ so the training provider understands your specific training goals and can properly estimate the amount of time and work to create your curriculum. Customized training curriculums have focused on:

- Regional climate
- Regulations
- Codes and work practices applicable specifically to your area or organization.

Include as much detail as possible on the estimated need and build this into the pricing, possibly as a line item.

EVALUATION OF LEARNING/LEARNER ASSESSMENT

Trainings should all require some form of end-of-course knowledge check, test or assessment to determine whether learning objectives have been achieved. **This is separate from any certification exams.**

Including this requirement, and ensuring that you have access to the results, will assist in improved T&TA planning over time.

TIP:

Require a line item for Training Preparation in your cost sheet/budget proposal.

Breaking out the development costs will give you a sense of how much time the provider is planning to put into customizing this training.

CERTIFICATION TESTING & CEUS

If certification is a goal of the training, will the trainer or contractor be responsible for facilitating the proctoring of BPI exams or preparing attendees to take a certification exam?

If procuring CEUs for your network is a goal of the training, specify who will be responsible for securing CEUs for the training.

END OF COURSE EVALUATIONS

Course evaluations are an opportunity for the learners to share their experiences and perceived strengths and weaknesses of the provided training, similar to the conference session evaluations common at most training conferences. This information can inform future planning. The evaluation should include questions about applicability of the training to their job tasks. The RFP should clarify *who* will be expected to do *what* with the evaluations.

TRAINING RETENTION ACTIVITIES

Ideally, learners will apply the knowledge and skills covered in the training to their routine job tasks, which reinforces the learning. But studies have shown that without retention activities, **participants lose 75 % of what they learn just 6 days after the training.**

If you would like the training provider to provide any follow-up or 'refresher' content for learners, specify in your RFP or RFQ how often training retention activities should occur and the method for determining whether participants are retaining the information.

LOCATION AND LOGISTICS

Ideally, holding the training at a location in your state or region minimizes travel for your participants. But sometimes a needed training will require your staff to travel to the training center. The training provider needs as much detail as possible to prepare an accurate travel expense estimate. Make sure to include the answers to following questions in your RFP or RFQ:

Where will the training occur?

Will you require the trainer travel to your state?

Are you open to having your staff travel to a training provider if the facilities are more suitable?

The training environment and good organization is an important factor in the success of the training. Logistics include organizing all the activities leading up to, part of, and following the training to ensure needed equipment and materials are available and processes are followed.

Include in this part who is doing the announcement or recruitment of participants, managing registrations and confirming pre-requisites, sending confirmations, obtaining field sites for field training, whether food will be included as part of training and who provides it. Additional materials considerations include the actual training materials, sign-in sheets, evaluation forms, nametags, notepads and pens. Also detail the technology and equipment requirements. Will the trainer need to bring their own AV equipment?

Detailing out logistics requirements and responsibilities provides a place for proposers to show budgets for any additional training materials they will provide, allowing you as a training requester to better decide which proposal is best for you.

Note: If the training is an IREC-accredited training program, the provider will have policies in place to ensure a suitable learning environment but logistics of the process must still be clarified.

ADMINISTRATION

Define the expectations for who will be responsible for which aspects of administering the training:

Registration Fees – If you use registration fees, who will track and record them?

Reporting – Do you want a follow-up summary report and/or conference call to discuss at the end of the course? If it's a longer-term training timeline, do you want monthly status reports?

Contract kick-off meeting and/or planning meeting – Quality, applicable training requires this step, so allow your proposers to budget for it. Even after reviewing manuals and standards, the training providers will need to get a feel for the Grantee or subgrantee that is contracting for training, and get any questions related to regional variations answered.

Travel – Be sure to describe how travel can be billed. Differences can be vast between State travel guidelines, Federal travel policies, and a single company policy.

TIP:

Describing the invoicing process, related requirements and expectations is an important supplement to the Scope of Work and typically is a stand-alone section in the purchasing document.

Describe how often and what level of detail will be required for invoices. How frequently must they be submitted, monthly or at the end of training? (Hint: at the end of each training reduces administrative costs.)

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**.

TIP:

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

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 QCI 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 provider must include a pre-test to help identify any sections of the JTA requiring special attention. Training goal is a minimum 85% of attendees indicate in post-training evaluations that they feel prepared to take the BPI EA written and field exams.

Training Delivery

Training provider will conduct preliminary screening (preferably via online/distance learning models) to ensure participants are ready to attend core training (e.g., minimum vocabulary and building science background knowledge, basic mathematics). Training provider will suggest any recommended remedial activities/training for specific attendees, as needed. The preliminary screening is included in the RFP, but any suggested remedial activities will be proposed and budgeted separately. Grantee is responsible for ensuring attendees complete remedial activities as required.

Core training will be conducted in-person or online and include a mixture of classroom sessions and hands-on field work. Ideally the training will start by June 2020 and be completed by the end of July 2020.

Frequency and Length of Training

Frequency and length of preliminary screening and follow-up remedial activities are left to the discretion of the training provider. Grantee will work with selected training provider to adjust timeline as feasible.

Training provider will propose structure of training (e.g., one training for all attendees, several smaller groups) and length of training based on class-size limitations and estimated number of attendees. Grantee recognizes that hands-on activities typically lead to greater training retention and also require lower student to instructor ratios.

Curriculum Development & Training Preparation

Training provider may use existing IREC-accredited curriculum for Energy Auditor training, provided it is customized for our state-specific standards, policies, and protocols. Grantee will review and approve curriculum prior to training on a mutually agreed-upon schedule.

Evaluation of Learning/Learner Assessment

Training provider will deliver an end-of-course assessment aligned with the learning objectives of the course. This must include a training provider-developed field exercise and written exam at the conclusion of the training. Results will be made available to the Grantee.

Certification Testing & CEUs

Training provider will ensure attendees receive applicable BPI CEUs.

At the conclusion of the training, successful participants are expected to have obtained the knowledge needed to pass the BPI EA written and field exams. Attendees and employers will be responsible for scheduling exams.

End of Course Evaluations

Training provider will share their end of course evaluation instrument for Grantee review and revision. Training provider will provide copies and distribute the evaluation to training participants. Training provider will share consolidated responses with Grantee within 30 days of completion of training.

Training Retention Activities

No training retention activities are required for this training. Participants will take the BPI HEP EA written and field EA exams shortly after this training.

Location and Logistics

Any in-person training will be held in _____town, State. Grantee will acquire classroom and field training sites based on specifications provided by training provider.

If the training provider would like to propose an alternate site, it must be a location that minimizes travel for all participants, as feasible. For example, [city] is centrally located with access to a regional airport and has multiple hotels with conference rooms that would be suitable. Any location proposed by training provider is subject to Grantee approval. If proposing an alternate location, training provider is responsible for securing field site. Training provider will be required to travel to the training location for in-person training.

Grantee will manage, registration and confirming pre-requisites. Grantee will be responsible for announcement of training, participant registration and will provide a list of registrants, including existing BPI certifications and training histories, to the training provider at least one month prior to the training. Training provider will then communicate directly with registrants regarding agenda, syllabus, whether they need to bring anything to the training, etc.

Grantee will coordinate with training provider to identify a location and venue for any in-person training and will arrange a lodging block for all attendees, a training room, and meals (lunch will be provided). Attendees and training provider will be responsible for securing reservations within that lodging block and paying for lodging. Grantee will be responsible for on-site attendance tracking, notepads and pens. For online training, training provider will be responsible for tracking attendance/participation and evaluation forms.

Training provider will be responsible for training materials.

Training provider will be responsible for working with venue staff for venue-specific training needs such as AV and room setup and any logistical issues that arise during the training.

Training provider is encouraged to propose alternatives, as feasible, for the hands-on field portion of the training. Grantee will assist the training provider in securing a home for the field work portion as needed. Training provider must supply Grantee with required home characteristics.

Administration

The training provider will attend two 2-hour pre-training meetings (webinars): a kick-off meeting and a follow-up meeting. Grantee will provide agendas and schedule these meetings.

The training provider will provide the Grantee with a training completion report that includes attendance details for each day of the training, evaluations completed by the participants (unedited), an analysis of participant performance, summative evaluation results (final tests), and any recommendations for additional T&TA or program improvements within 30 business days of completion of the training.

Invoicing will be done at the completion of each training (if attendees are split into cohorts) or at the completion of the entire training if they go through as one group. Travel will be billed according to State guidelines (see attached).

SAMPLE 2 - ADVANCED ENERGY AUDITOR TRAINING FOR SPECIFIC NEEDS 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 advanced training for experienced Weatherization Assistance Program staff, aligned with the NREL Job Task Analysis for Single-Family Energy Auditor. Training will be attended by 25 Subgrantee and Grantee staff that hold the BPI Energy Auditor credential and have at least two years of experience performing energy audits.

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 in affiliation with an IREC-accredited training provider. In addition, the instructor must hold active BPI EA and QCI certifications. Energy Auditing experience and expertise in NEAT/MHEA for single family homes required. At least three years of experience training in the WAP network preferred.

Needs Assessment and Training Goals

Grantee quality assurance monitoring has identified a specific need for the following training:

- combustion safety testing,
- improving accuracy of site data collection,
- improving accuracy of data entry into energy modeling software (NEAT/MHEA), and
- duct leakage testing.

Additional details from a Grantee-completed training needs assessment will be shared with the selected training provider at least two months prior to the training date.

Training Delivery

Training will be conducted either as blended learning (partially on-line/remote, partially in-person) or 100% in-person. It will include a mixture of classroom sessions (either on-line or in-person) and hands-on field work (in-person). Participants will be required to perform elements of the audit and collect data at a home. Ideally the training will be *completed* by the end of July 2020.

Frequency and Length of Training

The training will be held one time and all participants from throughout the state will attend. Grantee anticipates a maximum of five (5) full days of training equivalent, whether in-person or online.

Curriculum Development & Training Preparation

Training provider may use portions of existing IREC-accredited curriculum for Energy Auditor training, provided it is customized for our state-specific standards, policies, and protocols. Grantee anticipates sections or modules of existing curricula may be relevant (combustion safety and duct leakage testing), but that portions of the training content will need to be created specifically for this audience after reviewing needs assessment, completed audits, and other background provided to training provider. Grantee will review and approve curriculum prior to training on a mutually agreed-upon schedule with the training provider, to be determined upon award of the training contract.

Evaluation of Learning/Learner Assessment

Training provider will deliver an end-of-course assessment aligned with the learning objectives of the course and make the results available to the Grantee.

Certification Testing & CEUs

The training provider will be required to secure BPI CEUs for the training and submit all required documentation to BPI.

End of Course Evaluations

Grantee will distribute and collate an end of course evaluation.

Training Retention Activities

Training retention activities are required three weeks and six weeks following completion of the training. The retention activities will be designed and developed by the training provider and delivered remotely/online. Grantee will review and approve training retention activities on a mutually agreed-upon schedule with training provider.

The training provider will provide a summary report of participation and performance within one month of completion of final activity.

Location and Logistics

In-person training will be held at the XYZ warehouse facility in _____town, State. The training provider will be required to travel to the training location. Training provider will reserve and pay for personal lodgings.

Administration

Training provider will attend a 4-hour virtual kick-off meeting after reviewing technical standards. Grantee will be responsible for developing the agenda and facilitating the meeting, and will coordinate with training provider.

Training provider will provide Grantee with a training completion report that includes attendance details for each day of the training, evaluations completed by the participants (unedited), an analysis of participant performance, learning assessment results, and any recommendations for additional T&TA or program improvements within 30 business days of completion of the training. Invoicing will be done once at the conclusion of the training. Travel will be billed according to our state guidelines (see attached).

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

Our Agency recently incorporated manufactured housing into our portfolio. Our existing energy auditors are using MHEA energy modeling software. Savings to Investment (SIR) for belly insulation and repair returned through MHEA have been consistently lower than expected based on the experiences of other agencies in the region with similar housing stock.

Training Goal: After the training, auditors will accurately capture the existing thermal characteristics of the manufactured housing and enter data correctly into MHEA 95% of the time.

Training Delivery

Training can be provided using multiple delivery formats, but must include:

- Instructor-led training
- Visit to at least one manufactured house that has not been weatherized for site data collection
- Other formats as deemed effective by the Training Provider

Training must be conducted before the end of this calendar year.

Frequency and Length of Training

Training must be at least two days, although more days may be needed. If respondent to this RFP believes additional types of training are needed to attain the Training Goal, those types of training should be described and their costs listed in the response. Note that cost sheet asks proposers to split out items.

Curriculum Development & Training Preparation

Training provider may use an existing curriculum for MHEA, provided it is customized for our Grantee and Agency-specific standards, policies and protocols. Our Agency will review and approve curriculum prior to training.

Training provider should describe how they design training to engage participants with a variety of learning activities.

Training provider should include an estimate for curriculum development and preparation for the course as a separate line item. Note that the cost sheet is formatted to allow for this.

Evaluation of Learning/Learner Assessment

Training must include pre- and post-assessments to gauge skill and knowledge development. The training provider should demonstrate how the assessment results can be used to improve future training.

Certification Testing & CEUs

CEUs are not required.

End of Course Evaluations

Training provider must employ a participant evaluation to gather training learner reaction and applicability to their job. These will be scanned and provided to the Agency as scanned originals.

Training Retention Activities

No training retention activities are required for this training.

Location and Logistics

Pre- and post-training planning and evaluation meetings between Our Agency and training provider will be conducted virtually via webinar/conference call.

Training provider should include funds to travel to Our Agency's location to conduct the two-day training, including adequate set-up and tear-down time if props or other equipment will be used.

Our Agency will be responsible for participant registration and will provide a list of registrants to the training provider at least one month prior to the training. Training provider is responsible for developing and administering learning assessments (subject to approval of Our Agency), tracking attendance, end-of-course participant course evaluations, and any other on-site logistical needs.

Our Agency will provide classroom space equipped with Wi-Fi enabled computer and projection, seating for 12 learners, restroom and parking. Training provider should include how they will supply any other equipment or props needed for the training.

Our Agency will select and gain access to at least one manufactured home to use for the training. Our Agency staff will be responsible for securing resident or homeowner approval and other all other such communications.

Energy auditors will attend the training with their Agency-issued laptops. They will bring and use their Agency-issued diagnostic testing equipment (i.e., blower doors, manometers, IR cameras) and other tools necessary for site data collection (tape measures, hand tools, etc.). Training provider will provide a list of required tools and equipment for field session, and Agency staff will identify any items not included in the Agency-issued tool kits. Agency staff will coordinate with training provider to fill gaps or revise training.

Administration

Training provider will provide Our Agency with a training completion report that includes attendance details for each day of the training, evaluations completed by the participants (unedited), an analysis of participant performance, learning assessment results, and any recommendations for additional T&TA or program improvements within 30 business days of completion of the training.