✓ REGISTER for the Next Sessions with DOE

Hint: Click on the Link in the Chat

https://nrel.zoomgov.com/meeting/register/vJIsceiuqDItEl5_nndsg3Ntords_Wutsas

- **November 2nd | 3:00pm-4:00pm EDT**

  The "Art of the Start" Peer-to-Peer Learning Session

  -Presenters from Colorado and North Dakota SEOs

- **November 16th | 3:00pm-4:00pm EDT**

✓ TYPE what topics you would like covered in upcoming sessions, in the chat.

November 2nd | 3:00pm-4:00pm EDT Speakers

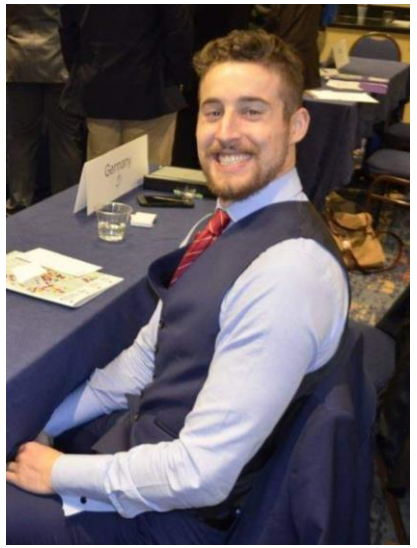
The "Art of the Start" Peer-to-Peer Learning Session

Chad Weikel, Climate Workforce Development Manager, Colorado Energy Office

Chad is a lifelong educator, experienced in national non-profit missions protecting public health and the environment. He is passionate about taking Climate Action while connecting career opportunities to ALL residents of Colorado.

Cameron Hayes, State Energy Administrator, North Dakota Division of Community Services, North Dakota Department of Commerce

Cameron has previously worked in the private sector as a Corporate Trainer, Operations, and International Affairs, and hopes to bring a broader perspective to the fast-growing State of North Dakota. Served in the U.S. Army for 8 years and wishes to continue his service to the citizens of North Dakota.



Happily, lives with his wife and two sons in Bismarck, North Dakota, or as he calls it, "his little home in the Great White North."

Training for Residential Energy Contractors (TREC) Webinar

IRA Section 50123

October 26, 2023

Mary MacPherson (SCEP)
Allison Moe (NREL)
Jeff Wanner (PNNL)

STATE & COMMUNITY ENERGY PROGRAMS

Webinar Agenda

1. TREC ALRD Updates
   - Support Resources for ALRD Responses
   - Training Certification.
2. TREC Evaluation Requirements
   - Performance Metrics
   - Program Evaluation Plan
   - Tracking and Reporting.
3. Q&A

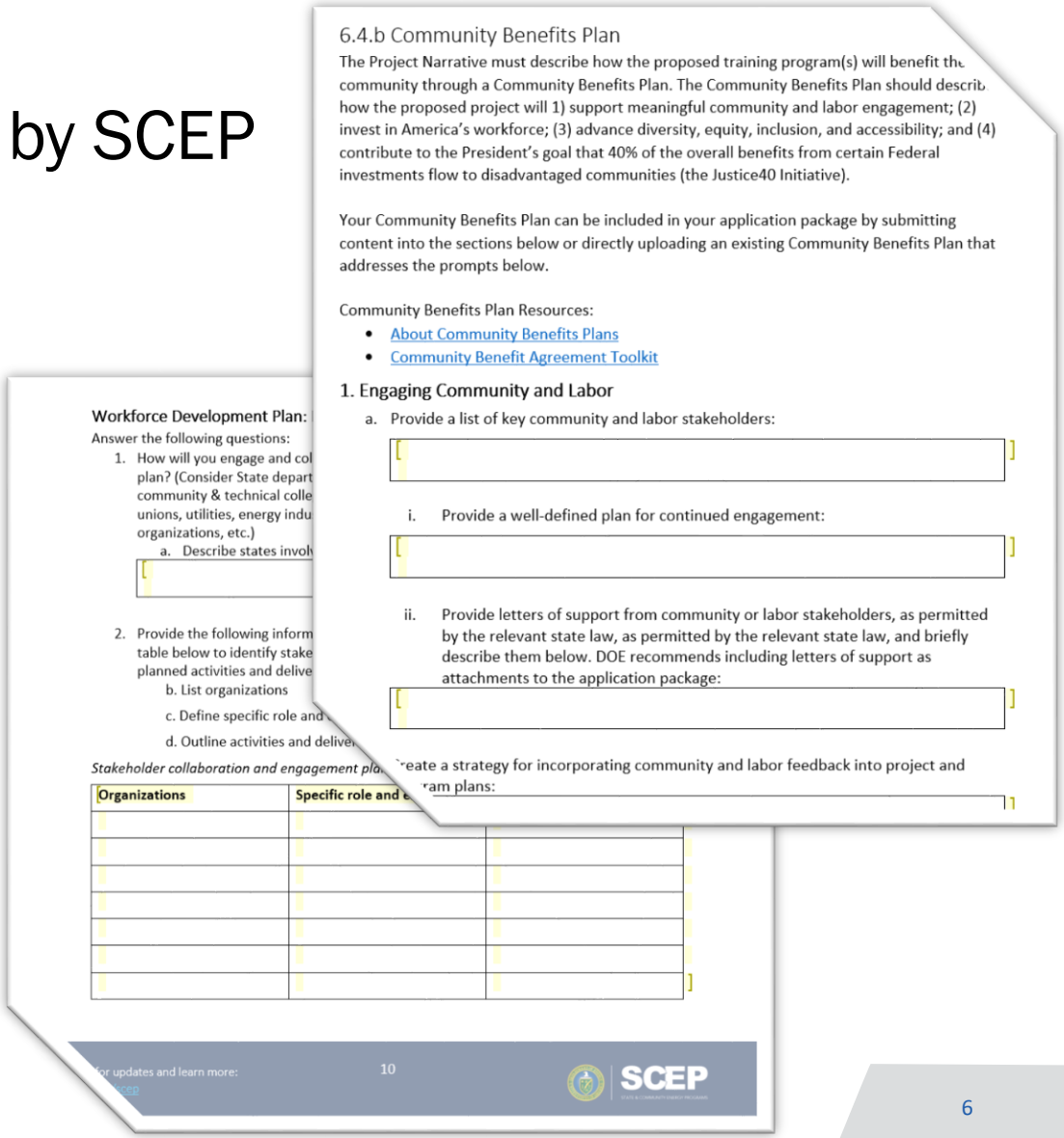
ALRD Updates in Response to Stakeholder Feedback

Updates	**DOE posted updates to the ALRD program requirements October 10, 2023.** We do not expect any future updates at this time.
Extended Deadline	**New application deadline is January 31, 2024,** to establish a more strategic linkage with the Home Energy Rebates ALRD.
Updated Terminology	Updated terminology for IRA 50121, 50122, and 50123, including State-Based Home Energy Efficiency Contractor Training Grants = **Training for Residential Energy Contractors, or TREC.**
Add Flexibility	**Flexibility around performance targets,** such as identifying a metric, or target, as not applicable, **and** in securing **letters of support.**
Removal of Barriers	• Removed **page limit restrictions.** • Removed requirements for an **assessment of energy auditor readiness and a skills assessment report.** • Updated requirements around **eligible certifications and Workforce Advisory Groups.**

Grant Submission Support Materials

Narrative Document Template published by SCEP

- **Not Required for submissions** but provided as reference and support.
- Designed to accompany the ALRD and not to stand on its own.
- Downloadable as a word document from the "Resources" section of the SCEP page (LINK).



More Information on Eligible Certifications

TREC applicants must demonstrate that their proposed certifications align with the skills and needs of their service area(s); meet energy workforce demands; and prepare the workforce to deliver energy efficiency, electrification, and clean energy improvements.

CERTIFICATION IDENTIFICATION:

- States choose from an **allowable list of certifications on the Building Science Education Solutions Center website or submit a certification or curriculum** for approval by the application deadline on 1/31/24.
- **Credentialing bodies, community colleges, and other entities can also submit certification or curriculum** to DOE for approval.
- **DOE and PNNL will review and approve certifications** by the anticipated end date for negotiations (3/29/24).
- **States and their partners should submit credentials sooner** so we can begin our review and avoid a potential backlog in Feb / March.
- If a certification or curriculum is not approved, **DOE and PNNL will work with whomever submitted it to help bring the certification or curriculum into compliance.**
- SCEP and PNNL will **individually review certification programs outside these categories**: heat pumps, heat pump water heaters, building envelope, and energy assessment programs.

DOE - Recognized Certification & Training Programs

Recognition from DOE allows training and certification programs to align with DOE's clean energy transition work. This enables training providers to distinguish themselves as leaders who are preparing workers for in-demand job opportunities.

Job scopes recognized under this program: (LINK)

- Home Energy Audit (single and multifamily)
- Heat Pump Installation
- Heat Pump Comfort Advising
- Heat Pump Water Heater Installation
- Residential Building Envelope Upgrades (under development).

Program Development Framework

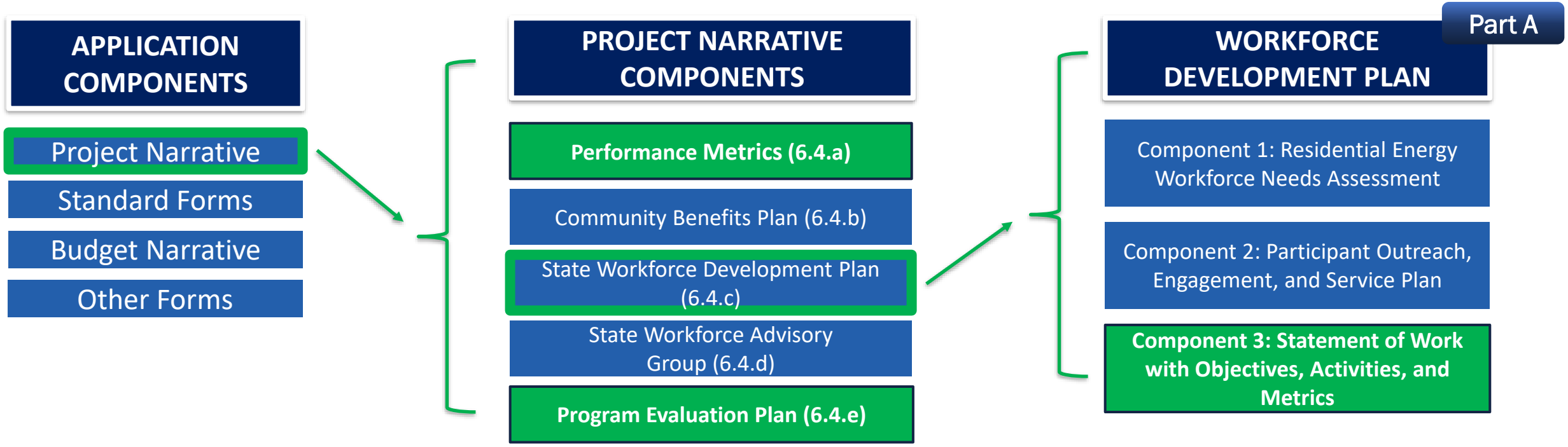
Partnerships & Coordinated Program Efforts Are Key to Success

Let's work together to maximize impact.

- ✓ **Engage the workforce ecosystem and other partners now, don't wait until the grant has been awarded.**
  - Contact state labor offices, workforce agencies, and others to establish partnerships.
  - Ask state and local workforce boards for input on the application.

- ✓ **Consider coordinating efforts with other programs such as:**
  - U.S. Economic Development Administration: Good Jobs Challenge and state economic development offices
  - White House American Climate Corps Programs
  - WIOA State Plans
  - DOL/NGA Collaborative
  - CHIPS And Science Act Of 2022 funding
  - Perkins Act funding
  - DOL Employment and Training Administration

ALRD Application Review



Sections shown in green address metrics and evaluation and will be covered today.

TREC Metrics & Evaluation

Application

Performance Metrics & Evaluation Plan

- Identify projected targets that align with program objectives and workforce needs
- Describe the plan to conduct a mid-point evaluation.

ALRD page 26-27 & 30

Scheduled Intervals

Quarterly and Annual Performance Reports

- Report on progress towards target metrics
- Highlight activities that help benchmark progress
- Confirm compliance with guidance and federal regulations & statues
- Explain efforts taken to fulfill the grant agreement.

ALRD page 15 & 26

Mid-Point

Report of Evaluation Results and Plan for Improvement

- Describe progress towards objectives/metrics
- Provide qualitative feedback from participants and stakeholders
- Provide the plan for improving program.

ALRD page 15

120-Days After

Close-Out Report

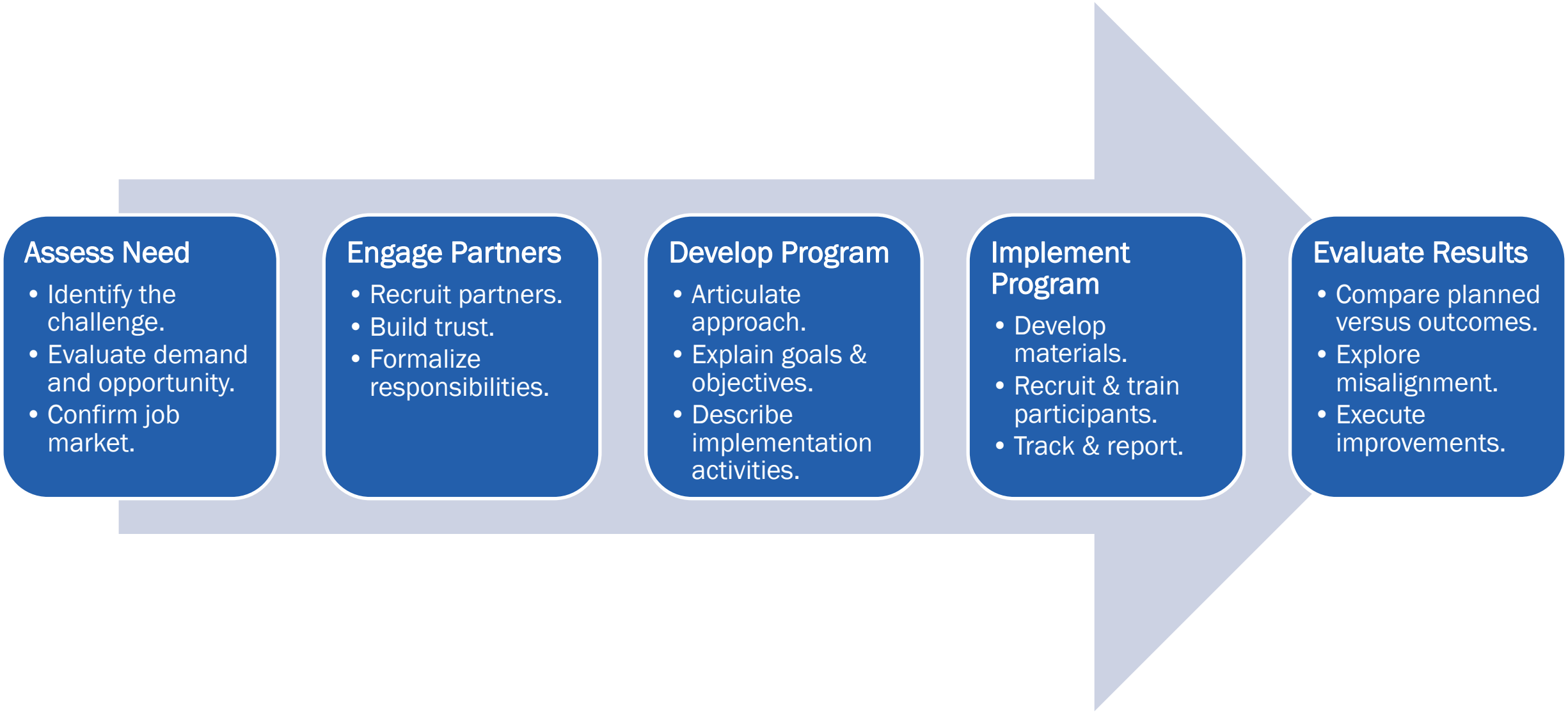
- Summarize quantitative data
- Outline planned versus actual metrics
- Offer qualitative data from participant / stakeholder feedback.

ALRD page 16

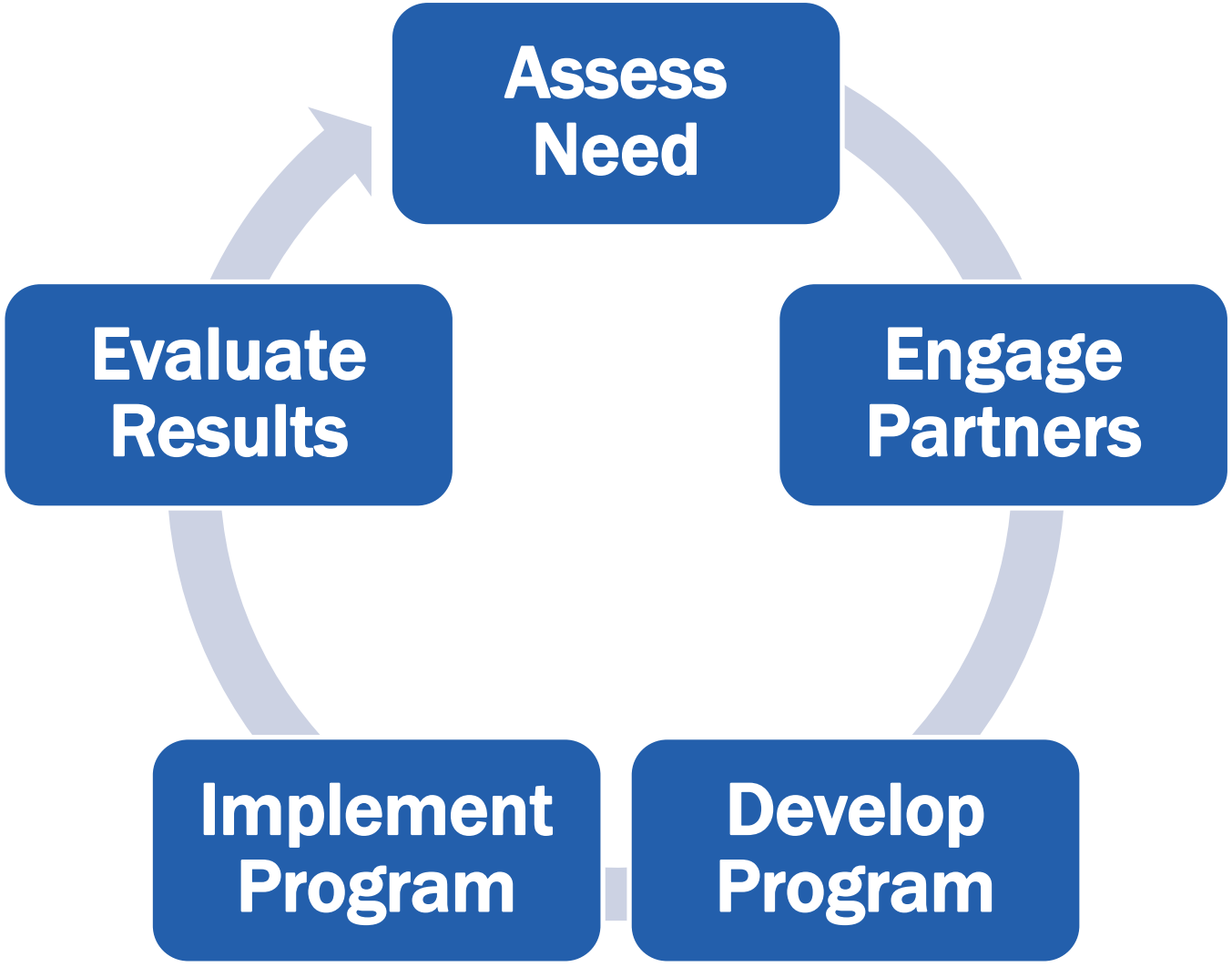
Performance Metrics

ALRD Section 6.4.a

Program Development & Implementation (Conceptual Overview)



Program Development & Implementation (Conceptual Overview)



Performance Metrics

6.4.a
Page 26

ALRD Requirement

DOE expects States to provide realistic targets for the performance metrics that are applicable to their program.

Guidance

ALRD provides **clarification on required metrics**.

Performance Metrics Table

Provide planned numeric targets for the period of performance for all performance metrics identified below, as applicable to your proposed project.

Performance Metric	Target Audience(s)
Number of individuals and/or businesses enrolled in the training program	✓ New workers ✓ Existing workers ✓ Contractor firms
The percentage of individuals that completed the training program	
The number of individuals that received a certification	
Number and type of industry-recognized skill or business certifications obtained through program assistance	
Number of participants from underserved or underrepresented populations	
Number of workers newly employed; promoted within current employment; or placed in a registered apprenticeship as a result of training	
Estimated cost of training per participant	

Failure to provide a completed performance metrics table (with values for all metrics, even if zero) will result in DOE returning the application to the state.

Performance Metrics Table (continued)

Provide planned numeric targets for the period of performance for all performance metrics identified below, as applicable to your proposed project.

Performance Metric	Target Audience(s)
Number of participants from communities of interest served through training	Disadvantaged*
	Tribal*
	Rural**
	Energy*
	Other

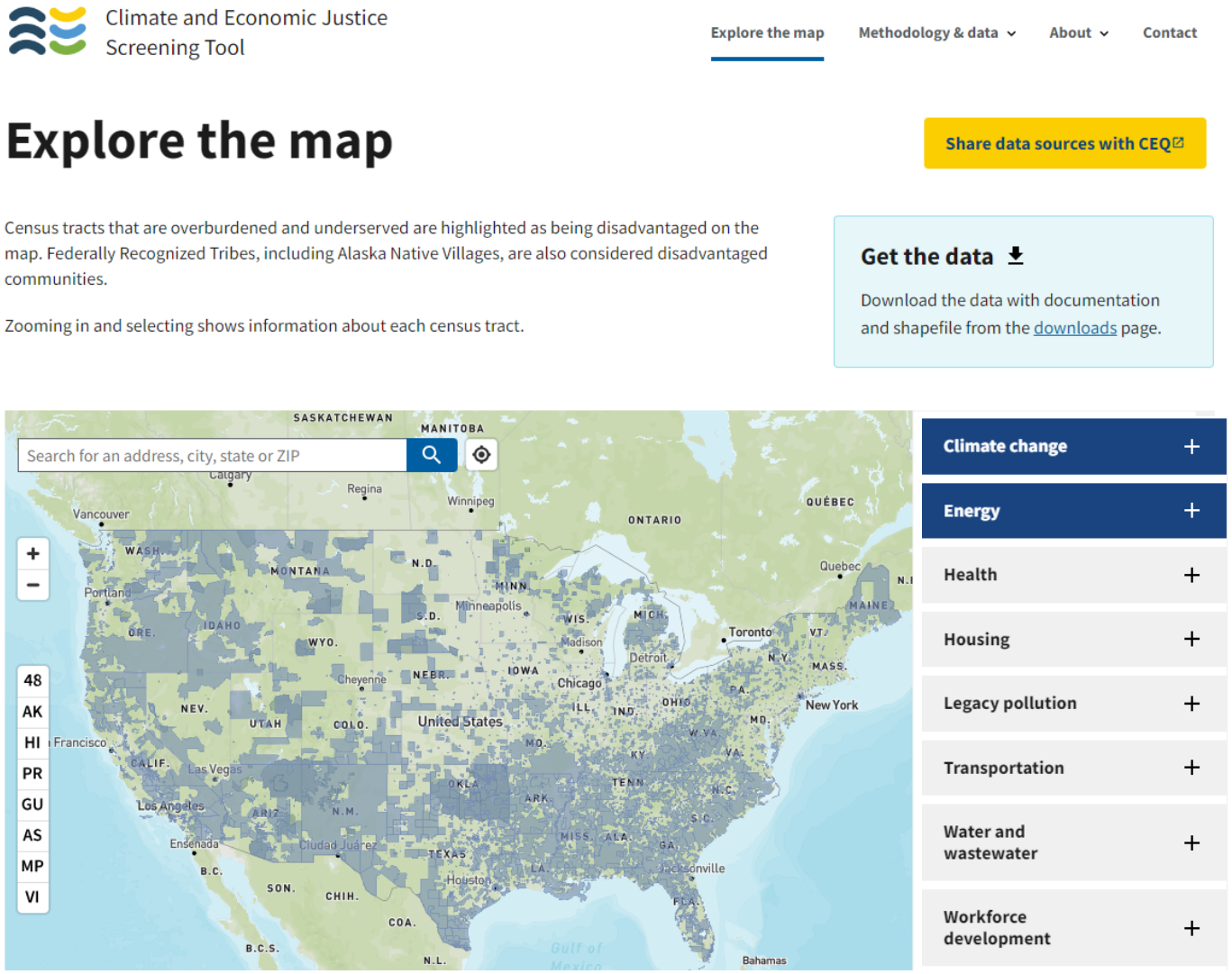
* Defined via White House CEJST tool
** Defined by the US Census Bureau

Failure to provide a completed performance metrics table (with values for all metrics, even if zero) will result in DOE returning the application to the state.

Guidance – Communities of Interest

Disadvantaged Communities
Communities are considered "disadvantaged" if they are in census tracts that meet the thresholds for *at least one* of the tool's categories of burden, or if they are on land within the boundaries of Federally Recognized Tribe.

CEJST training video available here.



https://screeningtool.geoplatform.gov/en/#3/33.47/-97.5

Guidance - General

Numbers for any of those metrics can be ZERO but cannot be left blank.

Talk to stakeholders and partners.

- Your state workforce agency, institutions of higher education, and local workforce boards can use their experience and expertise to share historic performance metrics for similar workforce programs.

The identified metrics are informed projections.

- You will be required to report on planned versus actual performance metrics via the quarterly and annual reports.
- A formal grant modification will be required to change the identified planned performance metrics. **See:** eCFR : 2 CFR 200.308 -- Revision of budget and program plans

Statement of Work with Objectives, Activities, and Metrics

ALRD State Workforce Development Plan 6.4.c
Part A, Component 3 (a-c)

ALRD Details

Component 3, Page 30

ALRD Requirement

a) Provide three to five strategic objectives that align program funds to identified workforce needs (at least one or more objectives must focus on how program funds benefit workers and businesses in disadvantaged communities).
b) Define the metrics used to measure performance of strategic objectives.
c) Explain activities that will incentivize workers and/or employers to pursue skills development and integration of applicable skills into existing workflows.
d) Describe the plan for meeting workforce training needs after TREC funding is expended.

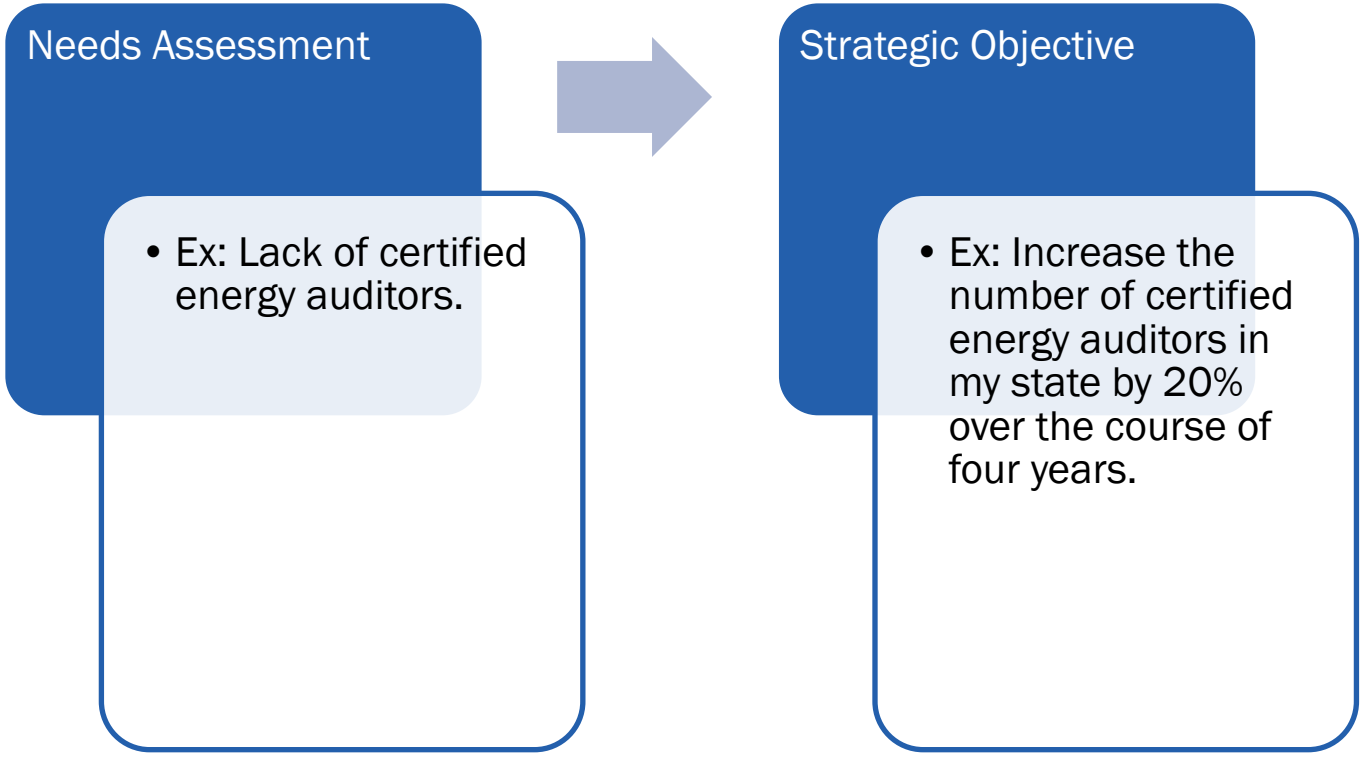
Guidance

Guidance and resources provided for a-c, **aligning needs, objectives, and metrics,** and **identifying activities**

3a. Aligning Objectives with Need

Component 3, Page 30

"Provide three to five strategic objectives that align program funds to identified workforce needs."



NOTE: At least one or more objectives must focus on how program funds benefit workers and businesses in disadvantaged communities.

3a. Crafting Objectives

Objectives should be SMART

- Specific
- Measurable*
- Achievable
- Realistic
- Time-bound

EXAMPLE:
Increase the number of certified energy auditors in my state by 20% over the course of four years.

**Measurable* means that each objective should align directly with one or more metrics.*

Source: NREL Workforce Program Design Presentation

Guidance - 3b. Aligning Objectives with Metrics

Component 3, Page 30

"Define the metrics used to measure performance of strategic objectives"

Needs Assessment

- Ex: Lack of certified energy auditors.

Strategic Objective

- Ex: Increase the number of certified energy auditors by 20% over the course of 4 years.

Performance Metric(s)

- Ex: Number of individuals that received a certification
- Ex: Number of individuals enrolled in the training program
- Ex: % of individuals that completed the training program.

NOTE: At least one or more objectives must focus on how program funds benefit workers and businesses in disadvantaged communities.

Guidance - 3b. Aligning Objectives with Metrics

Component 3, Page 30

NEED	OBJECTIVES (at least 3-5)	PERFORMANCE METRIC(S)
Lack of certified energy auditors	Increase the number of people certified energy auditors by 20% over the course of 4 years.	Number of individuals that received a certification.
	100 individuals will complete energy auditor training over the course of 4 years.	Number of individuals enrolled in the training program.
		% of individuals that completed the training program.
	50 people that complete training and receive certification are placed in jobs.	Number of workers newly employed; promoted within current employment; or placed in a registered apprenticeship as a result of training.

NOTE: At least one or more objectives must focus on how program funds benefit workers and businesses in disadvantaged communities.

Guidance - 3c. Identifying Activities

Component 3, Page 30

"Explain activities that will incentivize workers and/or employers to pursue skills development and integration of applicable skills into existing workflows."

- Activities are the actions that you and your partners will take to ensure that your program meets your objectives.

<u>When describing activities, consider the following:</u>

- When/how often will the activities take place?
- Who will be responsible for the activities (SEO/partners)?
- Activities should be reported in quarterly/annual reporting.

Evaluation Plan

ALRD Section 6.4.e

Funding Installments

Section 4.3.b
Page 15

To be eligible for the second half of TREC funding, States must submit:

1. Results from the program evaluation.
2. Plans for incorporating the evaluation results into improving the current state program.

Evaluation Plan Content

Section 6.4.e
Page 31-32

In the application, States should describe the following:

1. Expected timeline for mid-point program evaluation.
2. Determined components of the evaluation that should address or include, but are not limited to:
   - Progress against goals, activities, and metrics identified in Section 6
   - Feedback from program participants collected by the program
   - Process and program design improvements that would increase the likelihood of meeting program goals, activities, and metrics
   - Review of program impacts, and
   - Recommendations for improvement as identified by the program evaluation.
3. Identified evaluation questions that will assist the States in improving the program

Guidance & Resources

SEOs can self-evaluate or undergo a third-party evaluation. If working with a third-party, start the request for proposal process early.*

- Explore partnerships with research institutions to study program effectiveness.
- Look to your Workforce Advisory Group for input from target audiences.

Resources from the US Department of Labor's Evaluation and Research Hub

- Evaluating Workforce Programs: A Guide to What Policymakers Need to Know to Structure Effective, User-Friendly Evaluations
- Is My Evaluation Practice Culturally Responsive?
- Evaluation Toolkit: Key Elements for State Workforce Agencies

* NOT required, provided for reference/support

Reporting Expectations

Reporting Expectations

Application

Performance Metrics & Evaluation Plan

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ALRD page 16

Email questions to:
eeworkforceprograms@hq.doe.gov

Q&A found online:

https://www.energy.gov/scep/state-based-home-energy-efficiency-contractor-training-grants-questions-and-answers

Upcoming and Available Technical Resources

- **Program Guidance Website:** Includes links to FAQs, webinars, templates, and all program resources.
- **Technical Assistance Plan:** *Informed by YOU!*

Webinars:

- ALRD Overview and Workforce System Overview (7/24/2023)
- Workforce Development Plan and Needs Assessment (9/21/2023)
- Performance Metrics and Reporting (scheduled for 10/26/2023)

Open Office Hours:

- 11/2 and 11/16 (scheduled)

Templates: Workforce Narrative Application Template

Opportunities based on your input such as:

- Topical Webinars (to be announced)
- Open Office Hours
- Peer-to-Peer Learning and Networking Sessions
- Templates
- Compliance Trainings
- Trainee Recruitment, Curriculum Development and Other Support Resources

TREC Application Ways to Engage:

- Attend webinars and open office hours
- Review DOE's online resources and tools
- Contact DOE's Workforce Team at eeworkforceprograms@hq.doe.gov.

For more information on TREC, visit: State-Based Home Energy Efficiency Contractor Training Grants | Department of Energy

FAQs: State-Based Home Energy Efficiency Contractor Training Grants: Questions and Answers | Department of Energy

Thank You!

SCEP
STATE & COMMUNITY ENERGY PROGRAMS