

NASCSP WAP Monitor's Training

March 28, 2017



Incorporating Monitoring Results into Training Plans



Monitoring

- ✓ **Program**
- ✓ **Fiscal**
- ✓ **Technical**
- ✓ **Quality Improvement Plan**

Monitoring Results

- ✓ Findings
- ✓ Concerns
- ✓ **Recommendations**
- ✓ **Summary**

Monitoring Summary

- ✓ Trending right or trending wrong
- ✓ Areas to improve
- ✓ Team members to involve
- ✓ Is a deeper assessment appropriate?

Trending: Sub-grantee A

- ✓ PY 2014
 - ✓ Program: 7 findings, 8 concerns
 - ✓ Technical: 1 finding, 6 concerns
- ✓ PY 2015
 - ✓ Program: 7 findings, 11 concerns
 - ✓ Technical: 1 finding, 3 concerns
- ✓ PY 2016
 - ✓ Program: 13 findings, 14 concerns
 - ✓ Technical: 1 finding, 4 concerns

Trending: Sub-grantee B

- ✓ PY 2014
 - ✓ Program: 7 findings, 8 concerns
 - ✓ Technical: 1 finding, 6 concerns
- ✓ PY 2015
 - ✓ Program: 2 findings, 7 concerns
 - ✓ Technical: 11 findings, 9 concerns
- ✓ PY 2016
 - ✓ Program: 1 finding, 1 concern
 - ✓ Technical: 21 finding, 4 concerns

Trending: Sub-grantee C

- ✓ PY 2014
 - ✓ Program: 7 findings, 8 concerns
 - ✓ Technical: 1 finding, 6 concerns
- ✓ PY 2015
 - ✓ Program: 2 findings, 2 concerns
 - ✓ Technical: 2 findings, 3 concerns
- ✓ PY 2016
 - ✓ Program: 1 finding, 1 concern
 - ✓ Technical: 1 finding, 2 concerns

Trending: Sub-grantee D

- ✓ PY 2014
 - ✓ Program: 7 findings, 8 concerns
 - ✓ Technical: 1 findings, 6 concerns
- ✓ PY 2015
 - ✓ Program: 17 findings, 11 concerns
 - ✓ Technical: 14 findings, 3 concerns
- ✓ PY 2016
 - ✓ Program: 25 findings, 9 concerns
 - ✓ Technical: 17 findings, 11 concerns

Team Members to Involve

- ✓ Installers
- ✓ Crew Leaders
- ✓ Quality Control Inspectors
- ✓ Energy Auditors
- ✓ Weatherization Managers
- ✓ Support staff
- ✓ Administration staff

Deeper Assessment: Energy Savings!

- ✓ **Realized Savings Potential**
 - ✓ Top quality work- best practices
 - ✓ High level of quality control apparent
- ✓ **Some Savings Achieved**
 - ✓ Typically effective work
 - ✓ Opportunities for improvement
- ✓ **No Savings Achieved**
 - ✓ Measures not performed
 - ✓ Ineffective work

Where Do You Start?

- ✓ Doing the **right tasks** the **right way**
- ✓ Doing the **right tasks** the **wrong way**
- ✓ Doing the **wrong tasks** the **right way**
- ✓ Doing the **wrong tasks** the **wrong way**

What's the Plan?

- ✓ State must process a lot of information
- ✓ Additional Resources
 - ✓ Wx Training
 - ✓ Peer Exchange
 - ✓ State Events
 - ✓ Conferences
 - ✓ Certifications
 - ✓ CEUs

Program Training Plans

- ✓ **Optimizing Wx Program Resources**
 - ✓ 10 CFR 440 & Appendix A
 - ✓ State Plan
 - ✓ State Policy & Procedures Manual
 - ✓ Funding source combinations
 - ✓ ECMs, IRMs & H&S
 - ✓ Production Schedules
 - ✓ Time Management

Program Training Plans

- ✓ Semi-Annual Manager's Meetings
- ✓ Procurement & Contractor Retention*
- ✓ On-Site Technical Assistance
 - ✓ 1-on-1 with managers & support staff
- ✓ Ongoing Technical Assistance
 - ✓ Phone, email, meetings

Technical Training Plans

- ✓ What's the PLAN?
 - ✓ Retrofit Installer Shell
 - ✓ Retrofit Installer Mechanical
- ✓ Involve all team members
 - ✓ Consistency
 - ✓ Accountability
 - ✓ Decision making
 - ✓ Documentation

Tier 1 Trainings: Credentials

- ✓ Retrofit Installer Shell- 5 days
- ✓ Crew Leader- 2 days
- ✓ Energy Auditor- 5 days
- ✓ Quality Control Inspector- 4 days

Tier 2 Trainings: Credentials

- ✓ Retrofit Installer Mechanical- 3 days
- ✓ Multi-Family QCI- 3 days

Tier 2 Trainings: Proficiencies

- ✓ Introduction to Infrared Thermography
 - ✓ 1 class/field day
- ✓ Zone Pressure Diagnostics
 - ✓ 1 class day, 1 field day
- ✓ Daily Safety Test Out Procedures
 - ✓ 1 class day
- ✓ Mobile Home Weatherization
 - ✓ 1 class day, 1 field day

Tier 2 Trainings: Proficiencies

- ✓ High Performance Insulation
 - ✓ 1 class day, 1 field day
- ✓ DOE Health & Safety Policy
 - ✓ 1 class day
- ✓ Lead Safe Weatherization
 - ✓ 1 class day
- ✓ Moisture Assessment
 - ✓ 1 class day

Tier 2 Trainings: Proficiencies

- ✓ Carbon Monoxide & Combustion Analysis
 - ✓ 1 class day
- ✓ Electric Furnace & Heat Pump Inspections
 - ✓ 1 class day, 1 field (lab) day
- ✓ Heating System Airflow Diagnostics
 - ✓ 1 class day

Tier 2 Trainings: Proficiencies

- ✓ Vent Systems & Combustion Air Diagnostics
 - ✓ 1 class day
- ✓ Boiler Inspections
 - ✓ 1 class day, 1 field (lab) day
- ✓ Oil Furnace Training
 - ✓ 1 class day, 1 field (lab) day
- ✓ New Furnace Installation Inspections
 - ✓ 1 class day

Tier 2 Trainings: Proficiencies

- ✓ Mechanical Systems for Auditors
 - ✓ 2 class days
- ✓ CAZ Pressure Diagnostics for Auditors & Heating Techs
 - ✓ 1 class day
- ✓ Whole House Heat Load Calculations
 - ✓ 1 class day
- ✓ Applying the ASHRAE 62.2 Ventilation Strategy
 - ✓ 1 class day

Tier 2 Trainings: Proficiencies

- ✓ Introduction to NEAT/MHEA Software
 - ✓ 1* class day
- ✓ NEAT/MHEA Field Day
 - ✓ 1 field day
- ✓ NEAT/MHEA Test Out Day
 - ✓ 1 field/class day

Tier 2 Trainings: Proficiencies

- ✓ On-Site Technical Assistance
 - ✓ 1 on 1 with auditors, inspectors & technicians in the field

- ✓ Ongoing Technical Assistance
 - ✓ Phone, email, meetings

Routine Gatherings

- ✓ Quarterly Technical Trainings
- ✓ Quarterly Competency Maintenance Refreshers

Deeper Assessment: Energy Savings!

- ✓ **Realized Savings Potential**
 - ✓ Top quality work- best practices
 - ✓ High level of quality control apparent
- ✓ **Some Savings Achieved**
 - ✓ Typically effective work
 - ✓ Opportunities for improvement
- ✓ **No Savings Achieved**
 - ✓ Measures not performed well
 - ✓ Ineffective work

Energy Auditor Process

- ✓ **Realized Savings Potential**
 - ✓ Careful, comprehensive
 - ✓ CEUs
- ✓ **Some Savings**
 - ✓ Opportunities for growth
 - ✓ Targeted Tier 2 trainings
- ✓ **No Savings**
 - ✓ Significant, multiple shortcomings
 - ✓ Retake Tier 1, Tier 2, Competency testing

Crew Leader Process

- ✓ **Realized Energy Savings**
 - ✓ Appropriate decisions, materials & workmanship
 - ✓ CEUs
- ✓ **Some Savings**
 - ✓ Some decision, material, workmanship issues
 - ✓ Targeted Tier 2 trainings
- ✓ **No Savings**
 - ✓ Multiple decision, material, workmanship issues
 - ✓ Retake Tier 1, Tier 2 trainings, competency testing

QCI Process

- ✓ **Realized Energy Savings**
 - ✓ Attention to detail, excellent decisions
 - ✓ CEUs
- ✓ **Some Savings**
 - ✓ Some details missing, good decisions
 - ✓ Tier 2 trainings
- ✓ **No Savings**
 - ✓ No attention to detail, bad decisions
 - ✓ Issues may go beyond training

Competency Testing!

- ✓ Certifications speak to the technician's knowledge, skills & ability to do the job
- ✓ Monitoring speaks to the technician's performance on a daily basis
- ✓ Certifications & monitoring results indicate strengths & weaknesses

Competency Testing

- ✓ **Indiana Skills Verification Program**
 - ✓ Retrofit Installer Shell
 - ✓ Retrofit Installer Mechanical
 - ✓ Crew Leader
 - ✓ Energy Auditor
 - ✓ Wx Manager*

- ✓ **BPI Certifications**
 - ✓ Energy Auditor
 - ✓ Quality Control Inspector

BPI QCI/Energy Auditor Certifications

- ✓ BPI: 24 CEUs (3 years)
- ✓ ISV 16 CEUs per year
 - ✓ National Conferences
 - ✓ State Conferences
 - ✓ Specific Tier 2 Trainings
 - ✓ Specific topics targeting groups
 - ✓ Technical assistance targeting specific sub-grantees

The Investment of Time

- ✓ Staff Investment
 - ✓ Energy Auditor- 44 days+
 - ✓ QCI- 51 days+
 - ✓ Wx Manager- 40 hours
 - ✓ Executive staff- ?
- ✓ Contractor Investment
 - ✓ Shell Installer- 16 days+
 - ✓ Mechanical Installer- 17 days+
 - ✓ Crew Leader- 17 days+

Summary

“The only thing worse than training an employee and having them leave is not training an employee and having them stay”

