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U.S. Department of Energy
State and Community Energy Programs (SCEP)
Inflation Reduction Act (IRA) of 2022 State-Based Home Energy Efficiency
Contractor Training Grant (CTG) Program

State Application: Project Narrative Template (Section 6.4)

CFDA Number: 81.041

Date: September 20, 2023

How to Use this Template

Summary:

- This grant proposal template aims to help states apply for the State-Based TREC funding allocated under section 50123 of the Inflation Reduction Act (IRA) by the U.S Department of Energy (DOE). TREC programs are intended to support and expand the residential energy efficiency workforce, including the workforce needed to implement the Home Energy Rebate Programs funded through sections 50121 & 50122 of IRA.
- States are advised to modify this template to suit their specific needs while aligning the proposed training program with their broader energy efficiency goals.
- Key elements to focus on include a detailed program description, comprehensive curriculum design, impact measurement plan, and showcasing partnerships and capacity for long-term sustainability to enhance the proposal's chances of approval.
- **Areas highlighted in red** require specific input from the state or territory.
- 1-page of key metrics for every state and territory has been made available along with key data that can be inserted into this template. Columns in the sheet are identified by letters in red **AA, BB, CC, DD, and EE** at various points in this template.

Narrative:

This document provides a model Project Narrative Template (Section 6.4) to aid states in securing TREC funding from the Department of Energy (DOE) for their Home Energy Rebate programs. The template provides a foundation for states to customize and build on, and is based on successful state programs and lessons learned from training grant experiences from the American Recovery and Reinvestment Act of 2009 (ARRA). States should tailor this template to their specific workforce challenges while ensuring accurate inclusion of state-specific data and program goals. Post adjustments, states can submit their grant application, showcasing innovative approaches to energy efficiency training and building performance contracting.

State TREC applications should prioritize key elements that have proven effective in other programs: a detailed program description outlining objectives, a comprehensive curriculum addressing industry needs, and an impact measurement plan. Plans should also highlight local partnerships to enhance outreach and effectiveness, and demonstrate sustainable program growth beyond the grant period underscores commitment to long-term success. By choosing to incorporate best practices, states can strengthen their proposals and advance energy efficiency and building performance contracting in their communities.

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Project Narrative (1 Page)

The Project Narrative must demonstrate the State's ability to implement the grant project in accordance with the provisions of the Administrative and Legal Requirements Document (ALRD).

This application documents the [Name of submitting agency] plan to execute the grant project in accordance with the provisions outlined in DOE's ALRD for TREC. The application provides a clear plan for using TREC funds to strengthen the state's workforce. This plan involves adding to existing workforce programs and creating new ones using an IREC accredited training provider that has been a BPI Test Center and RESNET Training Provider for over 5 years. This collaboration helps reduce the cost of training for contractor employees while ensuring they receive high quality industry-standard testing and certification through the state's training program. The plan also engages nonprofit organizations to create a program that recruits trainees and helps them find jobs with home performance contractors once they finish training. The plan is committed to building a diverse workforce, in line with the President's Justice40 initiative and will keep track of metrics from start to finish to be transparent, accountable, and to support ongoing program improvement.

This application addresses each item listed in section 6.4 of the ALRD. The plan is to use TREC money to strengthen the state's workforce by making existing workforce programs better and creating new ones using a training provider that's been doing this for a long time. This will save money on training for contractor employees, while still offering best-in-class training and ensuring students earn industry recognized credentials. [STATE] is also teaming up with nonprofits to find and train people for jobs with home performance contractors. [STATE] wants a diverse workforce, which is important to the President's Justice40 plan, and will keep track of how things are going and share the results to be open about its progress and figure out how to do even better.

6.4.a Performance Metrics (1 Page)

Summary: [STATE] will train [AA] workers per installment including [BB] Justice40 focused workers. [Please see attached chart for calculations for each state assuming a training cost of \$5000 per worker]

Statement of Work: [Name of submitting agency] will:

- train [AA] workers;

- work with an IREC accredited training provider that has been BPI Test Center and RESNET Training Provider for more than 5 years to recruit new workers, incumbent workers, and contractor businesses servicing single-family homes and/or multifamily buildings in training programs for industry recognized credentials (e.g. BPI Building Analyst-Professional and/or RESNET HERS Rater) for them to participate in the Home Energy Rebate program.
- Budget \$5,000 per individual to pay for training and testing fees for either BPI Building Analyst-Professional or RESNET HERS Rater certification;
- establish a cloud-based contractor tracking system which will accept applications, collect contractor demographics, track applicant progress, provide for approval/disapproval, list approved contractors, and integrate with a future rebate tracking system to validate approved contractors. This system will have the ability to display up-to-date metrics which will allow the state to analyze the performance of the program, identify bottlenecks in the process, and highlight at risk-individuals and populations to both continually improve the system and accurately measure performance and impact; and
- system must integrate with a future rebate tracking system to validate approved contractors and allow for future metrics tying contractor performance back to specific training programs, industry credentials, or other data collected during training.

Outcomes		
Performance Metric	Target Audience	Planned Numeric Targets for the Period of Performance
Number of individuals and/or businesses enrolled in the training program.	New Workers	20% of AA
	Existing Workers	40% of AA
	Contractor Firms	40% of AA
The percentage of individuals that completed the training program.	New Workers	80% rate
	Existing Workers	90% rate
	Contractor Firms	90% rate
The number of individuals that received a certification.	New Workers	70% of trainees
	Existing Workers	80% of trainees
	Contractor Firms	80% of trainees
Number and type of industry-recognized skill or business certifications obtained through program assistance.	New Workers	3 per trainee
	Existing Workers	3 per trainee
	Contractor Firms (OJT)	3 per trainee
Number of underserved or underrepresented populations by type, demographics, and zip code (e.g., returning citizens, veterans,	New Workers	40% of trainees
	Existing Workers	40% of trainees
	Contractor Firms	40% of trainees

residents of disadvantaged communities, transitional youth, or displaced or at-risk energy community members) (e.g. race, gender, disability status, veteran’s status, returning citizens, transitional youth and/or household income prior to program participation.)		
Number of workers newly employed; promoted within current employment; or placed in a registered apprenticeship as a result of training.	New Workers	50% of trainees
	Existing Workers	50% of trainees
	Contractor Firms	50% of trainees
Estimated cost of training per participant.	New Workers	\$5000/trainee
	Existing Workers	\$5000/trainee
	Contractor Firms	\$5000/trainee
Number of communities of interest served through	Disadvantaged	10% of total
	Veteran	15% of total
	Tribal	5% of total
	Rural	10% of total

6.4.b Community Benefits Plan (5 Pages)

Per DOE, this section must describe how proposed work will:

- a. Support meaningful community and labor engagement;

To ensure the continuous refinement and optimal utilization of TREC funds, [STATE] will engage a diverse set of stakeholders including newly-entered workers, experienced incumbents, contractors, industry standard bodies, a non-profit representing the building performance industry, training providers, community colleges, local non-profit organizations, and state personnel. Through quarterly meetings, this collaborative forum will actively contribute to ongoing programmatic enhancements. By harnessing the insights and expertise of these stakeholders, [STATE] will be well-equipped to fine-tune its initiatives, respond to industry shifts, and adapt to emerging needs swiftly. The community is a vital conduit for maintaining the relevance and effectiveness of the state’s training efforts, ultimately driving the success of its workforce development endeavors. The state is committed to meeting training targets and will engage in a community benefits plan outlining the training and workforce opportunities available at no cost to citizens who participate in this program.

Include letters of support from community stakeholders.

- b. Invest in America’s workforce

This TREC funding is meant to grow the home performance workforce, including the contractor workforce needed for HOMES and HEAR program implementation. Those contractors will benefit from access to free training, qualified workers who have completed training and industry certifications, and the revenue generated from the retrofits they perform associated with each rebate program. In turn, contractors will be required to use employees who have earned industry certifications on each retrofit project that they perform in order to qualify for rebates. This establishes a strong and mutually beneficial relationship between the state and its contractors.

In order to facilitate the collection of data necessary to track these relationships and meet performance metric tracking requirements, [STATE] will implement a cloud-based metrics and tracking system that will accept training applications, collect contractor demographics, track applicant progress, provide for approval/disapproval, list approved contractors, and integrate with a future rebate tracking system to validate approved contractors for rebates. Moreover, the system will also be able to collect voluntarily disclosed information related to benefits and pay for trainees, track which trainees are employed by which contractors, and gather data on job quality from trainees by way of post-employment surveys. Finally, the same system could optionally be used by the state to approve rebates and can tie together measured outcomes from projects back to the contractor who performed the work, the trainee employed by the contractor on the job site, the industry standard earned by the trainee, the training provider who trained that individual, and even the instructor who taught the individual.

c. Advance diversity, equity, inclusion, and accessibility

TREC funding is a catalyst for advancing key pillars of diversity, equity, inclusion, and accessibility (DEIA). This strategic initiative goes beyond mere training and certification, as it focuses on creating a level playing field for individuals from all walks of life. By prioritizing outreach and recruitment efforts targeted towards underrepresented communities, the plan ensures that diverse voices are not only heard but amplified in the energy efficiency sector. Through specialized training programs that consider varied learning needs, it champions accessibility, making sure that opportunities are available to individuals with diverse backgrounds and abilities. In nurturing a workforce that mirrors the richness of our society, TREC funding pioneers a transformative path towards a more equitable and inclusive future.

This strategy for promoting DEIA will be reinforced by the provision of comprehensive wraparound services to program participants, achieved through collaborative partnerships with local non-profit organizations. By offering a range of support services such as mentorship, career counseling, child care assistance, transportation solutions, and language support

covered by funds and services braided in from partners through a collaborative process, the program ensures that participants have the necessary tools to overcome barriers and achieve success. This approach is particularly impactful for individuals who may face additional challenges due to socioeconomic factors or other circumstances. Through these collaborations, the program's DEIA objectives extend beyond training and certification, addressing systemic inequalities and creating an environment where all individuals can thrive. Working with community based organizations to provide wraparound services not only enriches participants' experiences but also reaffirms the program's commitment to fostering a diverse and inclusive workforce that reflects the community it serves.

The initiative will effectively spotlight its commitment to fostering entrepreneurship among a diverse range of business owners by integrating a comprehensive cloud-based system that tracks demographic data for trainees. This streamlined approach ensures that data on trainees' backgrounds and characteristics is readily accessible and systematically organized. By capturing demographic information, the program can tailor its support, resources, and outreach efforts to address the specific needs of underrepresented entrepreneurs. This proactive approach not only facilitates the growth of diverse businesses but also underscores the program's dedication to cultivating a business landscape that mirrors the broader community, promoting economic equity and inclusive entrepreneurship.

d. Contribute to President Biden's Justice40 goal

The [Name of submitting agency] will recruit students from disadvantaged communities as defined by the [Climate and Economic Justice Screening Tool](#). Specifically, [STATE] will place added emphasis on recruiting from those communities, working with non-profit organizations based in those communities, and conducting training in those communities.

The aforementioned cloud-based metrics and tracking system will serve as the key tool for monitoring and quantifying the tangible benefits anticipated to reach disadvantaged communities through TREC funding. From intake all the way through the process, software can track and retrieve data about this population and others on a real time basis. By meticulously capturing relevant data points, this system will enable the measurement of key indicators, offering an accurate representation of progress and outcomes. This data-driven approach ensures that the positive impact on disadvantaged communities, such as job placements, improved workforce skills, increased accessibility to training, and enhanced economic opportunities, is both quantifiable and traceable. Such accountability not only reinforces the program's commitment to equitable outcomes but also provides actionable insights for continuous improvement, enabling targeted interventions to maximize benefits for those who stand to gain the most.

Trainees possess an inherent understanding of their own communities, rendering the recruitment of individuals from disadvantaged backgrounds a strategic approach to effectively reintroduce energy efficiency projects to these areas. By enlisting trainees who are intimately familiar with the unique challenges, cultural nuances, and specific needs of their communities, the program ensures a contextually sensitive and community-oriented approach to project implementation. This localized knowledge not only enhances the relevance and impact of energy efficiency initiatives but also fosters trust and engagement among community members. By empowering trainees to become ambassadors of change within their own neighborhoods, the program taps into an invaluable resource that not only elevates energy efficiency projects but also contributes to holistic community development and economic growth.

6.4.c State Workforce Development Plan (10-15 Pages)

Part A:

[Name of submitting agency] State Workforce Development Plan includes the following items that meet or exceed mandatory DOE TREC requirements:

Component 1: Residential Energy Workforce Needs Assessments

a) Statement of Need: Provide a statement of need that clearly articulates the current supply of qualified skilled energy efficiency workers compared to the projected future demand. (DOE encourages States to partner with State Workforce Agencies to conduct a gap analysis to identify the labor supply needed to meet the labor demands.)

[STATE]'s residential energy efficiency workforce available to meet the demands of the industry shows a total of [CC - see attached metric estimates sheet for state-specific data] qualified skilled energy efficiency workers currently available to implement the measures available through the Home Energy Rebates Programs. This indicates that in order to meet the demands of the industry, [STATE] will need to train a minimum of [DD] new workers in order to meet projected needs associated with HOMES and HEAR.

Based on the allocated funding, less 10% for administrative costs (per the ALRD), the state can endeavor to train [AA] new workers to perform retrofit measures associated with Home Energy Rebate Programs, HOMES and HEAR, with each installment of TREC funds.

b) Indicate the program(s) for which the State will use TREC funds to prepare a skilled energy efficiency workforce. Programs could include the following:

- i. Inflation Reduction Act Home Energy Performance- Based, Whole House Rebate Program (HOMES); and/or*
- ii. Home Electrification and Appliance Rebate Program (HEAR); and/or*
- iii. Other existing or planned federal, state-, and utility-funded incentives and financing programs, as resources exist.*

[state agency] intends to utilize funding under TREC to implement the HOMES and HEAR programs. **[state can identify other programs available, if applicable]**

c) Identify existing programs, within a state’s jurisdiction, that meet residential energy contractor and worker needs, including a list of organizations currently provide training, credentialing, and/or wrap around services; and

Summary: TREC funds will be used to recruit trainees to support the Home Energy Rebate Program.

Statement of Work: **[STATE]** will work with a third party non-profit representing the building performance industry and an IREC (Interstate Renewable Energy Council) accredited training provider to recruit new workers, incumbent workers, and contractor businesses servicing single-family homes and/or multifamily buildings for training opportunities that will make them eligible to participate in the Home Energy Rebate program. Specific program(s):

- Everblue is a nationwide IREC accredited training provider operating in all states & territories.
- **[Identify any other local IREC accredited training providers in-state for HEP Energy Auditor program]**
- Non-IREC accredited providers working under an IREC accredited training provider, such as Everblue

Metrics: The state will measure the number of students recruited for training. Data on student demographics and training program(s) will also be tracked.

d) Present labor market information produced by federal or state departments of labor, as well as other sources, including current rates of employment in key occupations and forecasts of growing or declining industries and wage distributions across relevant occupations.

According to the DOE USEER 2021 report prepared by the National Association of State Energy Officials (NASEO), median energy worker hourly wages are \$25.60, 34% higher than the national hourly median of \$19.14 per hour. Approximately 32.1% of energy efficiency

jobs are in installation and repair roles that are well aligned with TREC funded training programs.

Please also provide at least one of the following:

a) An assessment of residential and commercial energy auditor availability and readiness; or

There are currently [CC] qualified workers in the state. Without TREC funds, [STATE] project a gap of [DD] qualified workers, but each installment of funding can train [AA] individuals to earn either BPI Building Analyst-Professional or RESNET HERS Rater for \$5000 per student by a high quality IREC accredited training provider.

b) A skills assessment report in existing education and training programs, such as on new energy technologies, latest best practices, or newly launching programs.

Summary: In 2023, the BPI industry standard body updated its credentials to offer the Building Analyst-Professional certification. This builds upon BPI's legacy Building Analyst certification, which was sunset on May 31, 2023 and incorporates current best practices for conducting energy audits and building science based energy efficiency and electrification retrofits.

Outcomes: The outcome from the analysis of the current number of qualified individuals, the total pool of available trainees, and how many of those individuals must be trained in order to meet the projected volume of work from the HOMES and HEAR programs indicates that TREC funds will close [EE%] of the gap in the workforce necessary to conduct energy audits and retrofit work.

Narrative: The comprehensive analysis of the present count of qualified individuals, the entirety of the available trainee pool, and the precise number of individuals requiring training to align with the anticipated workload stemming from the HOMES and HEAR programs reveals a highly promising outcome. It is evident that the allocation of TREC funds is poised to play a pivotal role in significantly mitigating the existing gaps prevalent within the workforce. These gaps are crucial to address in order to facilitate the seamless execution of energy audits and the subsequent retrofitting initiatives.

The precise number of individuals that must undergo training is aligned with the anticipated workforce demand arising from the HOMES and HEAR programs. This calculation takes into account not the projected volume of energy efficiency and electrification work stimulated by these rebate programs.

The infusion of TREC funds into the workforce development initiative will have a transformative effect. The identified gaps in the existing workforce, which could otherwise impede the seamless execution of energy audits and retrofit projects, stand to be substantially narrowed. This infusion of funds enables a twofold impact: firstly, by enhancing the skill set and capacity of the existing workforce, and secondly, by equipping a larger number of individuals with the proficiency to actively contribute to the energy sector's growth.

By addressing the workforce gaps head-on, these funds are not just monetary allocations, but strategic investments that stand to bolster the energy industry, promote sustainability, and foster economic growth, all while catalyzing positive change within the broader workforce landscape.

Component 2: Participant Outreach, Engagement, and Service Plan

a) Outline how the funds will be used to serve participants from at least one of the following audience(s):

- i. New workers, especially from disadvantaged communities, for recruitment and training;***
- ii. Incumbent workers for upskilling and retraining;***
- iii. New or existing residential energy contractors for training on leadership, entrepreneurship, business management, financial management, responsible contracting, and/or other relevant skills;***

Summary: TREC funds will support an outreach campaign informing the following individuals and organizations about training available that is required to participate in the Home Energy Rebate program:

1. New workers;
2. Incumbent workers for upskilling and retraining; and
3. New or existing contractor businesses servicing single-family homes and/or multifamily buildings.

Narrative: [STATE] seeks to deploy TREC funds to make a substantive difference in the energy workforce. These TREC funds will be used to help train new workers, especially people from disadvantaged backgrounds. [STATE] plans to partner with local workforce boards funded by the Workforce Innovation and Opportunity Act and non-profit organizations such as Hiring Our Heroes (for veterans transitioning from the military), Good Will (rural workers), and AmeriCorps (disadvantaged workers) that focus on specific groups to find and train these individuals. As [STATE] adds new contractors to the state's workforce, [the STATE ENERGY OFFICE] will work

with community members and partners to ensure the energy industry better reflects our state's diversity.

These funds also have the back of workers who've been around but might need a boost. If someone has an entry level certification such as RESNET Retrofit Installer Technician or BPI Infiltration and Duct Leakage, these funds will help them level up and upskill. Contractors can aim for more advanced and higher paying certifications like RESNET HERS Rater, BPI Building Analyst-Professional, and HEP Energy Auditor. Skills matter, and the [STATE] TREC program will invest in these individuals to tackle more advanced challenges.

And that's not all – these funds will be available to existing residential energy contractors like plumbers, electricians, and HVAC pros. [STATE] is going to teach them building science and help them earn certifications such as RESNET HERS Rater, BPI Building Analyst-Professional, and HEP Energy Auditor. This means these contractors can dive into the energy-efficiency and electrification opportunities opened up by HOMES and HEAR programs. They'll be ready to do rebate work and bring their A-game to the growing world of energy efficiency.

Contractors with the following credentials will be required to perform retrofit work eligible for Home Energy Rebates:

- Home Performance Contractors with BPI Building Analyst-Professional Certification, RESNET HERS Rater Certification, or HEP Energy Auditor Certification.
- Licensed HVAC Contractors with BPI Building Analyst-Professional Certification, RESNET HERS Rater Certification, or HEP Energy Auditor Certification.
- Plumbers (for heat pump water heaters) with BPI Building Analyst-Professional Certification, RESNET HERS Rater Certification, or HEP Energy Auditor Certification.
- Electricians with BPI Building Analyst-Professional Certification, RESNET HERS Rater Certification, or HEP Energy Auditor Certification.

b) Identify what methods were used to determine the need to target the selected audience(s); and

Methods: In selecting target audiences for this initiative, a concerted effort has been made to identify historically underrepresented groups, including veterans, individuals residing in rural areas, and other disadvantaged populations. These groups are integral to President Biden's Justice40 initiative, which emphasizes equitable distribution of benefits from environmental and energy programs. To ensure their inclusion, collaboration with local workforce development boards and non-profit organizations with expertise in addressing the needs of these specific communities is key to the state's success. This not only leverages the reach and insights of established community partners but also tailors recruitment

strategies to cater to the unique challenges and aspirations of veterans, rural residents, and other disadvantaged individuals. By targeting these audiences and aligning with the Justice40 principles, the initiative strives to bridge historical gaps, foster inclusivity, and empower those who have long been underrepresented in the energy sector.

c) List the organizations that will be involved in identifying and recruiting potential participants, including labor and community-based groups.

Organizations [State should add/insert to this list based on local partnerships available as identified from any needs assessment]:

- Building Performance Association
- Everblue
- Hiring Our Heroes
- Good Will
- AmeriCorps
- Local Workforce Development Boards
- [State should insert any other state or local organizations or partners that will be involved in recruiting onto this list]

Component 3: Statement of Work with Objectives, Activities, and Metrics

Summary: TREC funds will be used to enroll individuals with training providers aligned with the Home Energy Rebate Program.

a) Provide three to five strategic objectives that aligns 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.)

Objective #1: Work with a third party non-profit representing the building performance industry in order to recruit new workers, incumbent workers, and contractor businesses servicing single-family homes and/or multifamily buildings to training opportunities. Track metrics on size of audience reached, number of touchpoints, number of individuals recruited from each channel, names of partner organizations, and demographics of individuals enrolled in training.

Objective #2: Work with an IREC accredited training provider that has been BPI Test Center and RESNET Training Provider for more than 5 years to enroll new workers, incumbent workers, and contractor businesses servicing single-family homes and/or multifamily buildings in training

programs for industry recognized credentials (e.g. BPI Building Analyst-Professional and/or RESNET HERS Rater) for them to participate in the Home Energy Rebate program.

Objective #3: Establish a cloud-based metrics and tracking system that will accept training applications, collect contractor demographics, track applicant progress, provide for approval/disapproval, list approved contractors, and integrate with a future rebate tracking system to validate approved contractors for rebates. This system will have the ability to display up-to-date metrics which will allow the state to analyze the performance of the program, identify bottlenecks in the process, and highlight at risk-individuals and populations to both continually improve the system and accurately measure performance and impact; system must integrate with a future rebate tracking system to validate approved contractors and allow for future metrics tying contractor performance back to specific training programs, industry credentials, or other data collected during training.

Objective #4: From enrollment through completion of training ensure a 80% success rate for new workers and 90% success rate for incumbent workers and contractors. Additionally, at least 70% of new workers and 80% of incumbent workers and contractors who complete training will pass an industry certification exam (e.g. BPI Building Analyst-Professional and/or RESNET HERS Rater).

Objective #5: At least 40% of trainees will meet one or more of the criteria of the Justice40 initiative, ensuring that a diverse workforce is trained to meet the energy efficiency and electrification needs of America's diverse population.

b) Define the metrics used to measure performance of strategic objectives;

Metric #1: Track metrics on size of audience reached, number of touchpoints, number of individuals recruited from each channel, names of partner organizations, and demographics of individuals enrolled in training.

Metric #2: The number of students enrolled and the industry recognized credentials they enroll in. Completion rates for training and pass rates on industry certification exams.

Metric #3: Database of certified individuals available to validate contractor eligibility to perform energy efficiency and electrification retrofits under the HOMES and HEAR rebate programs.

Metric #4: Student completion rate tracked for each IREC accredited training provider that has been BPI Test Center and RESNET Training Provider for more than 5 years, each instructor conducting classes for that training provider, and pass rates on industry certification exams by instructor and training provider.

Metric #5: Data on student demographics and training program(s) tracked and reported to gauge effectiveness at recruiting students who meet Justice40 criteria.

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

In the past, organizations that have been required to merely have one trained individual on staff would meet a minimum requirement of a rebate program without meeting its intent. Quality of work was inconsistent, and the owner(s) of the contracting firm had little incentive to train their employees as they would be absent from production. Additionally, untrained workers often have little in the way of career progression available, resulting in high turnover and inconsistent quality of work.

The strongest incentive to pursue training and complete industry certification (e.g. BPI Building Analyst-Professional and/or RESNET HERS Rater) is to require that every contractor performing a retrofit must have one of the approved industry certifications in order for the homeowner to qualify for a rebate associated with that work. Each contracting firm must have at least one individual onsite with at least one of the required industry certifications to ensure that energy efficiency and electrification work is done according to building science best practices.

[STATE] will work with an IREC accredited training provider to maintain a database of eligible contractors that have the requisite industry recognized credentials (e.g. BPI Building Analyst-Professional and/or RESNET HERS Rater) from an IREC accredited training provider with 5 years of documented experience as a BPI Test Center and RESNET Training Provider.

The eligible contractor database will be publicly available and searchable by homeowners looking for a qualified, high-quality contractor to perform Home Energy Rebate retrofits.

The database must have an application programming interface (API) to allow for real time automated checks of contractor eligibility by any vendor processing rebate applications for the state, profile updates from the contractors themselves, or ingest of eligible contractor information from other qualified training providers.

d) Describe the plan for meeting workforce training needs after TREC funding is expended.

Currently, the gap in the workforce relative to the necessary number of trained individuals is wide. TREC funds will help ramp up both the size and quality of the energy efficiency workforce available. When TREC funds are fully expended, the **[STATE]** workforce will have grown substantially and will not need as many new

trainees to sustain itself - so long as existing certification holders remain in the workforce.

IREC accreditation adds an extra layer of credibility and validation to the training programs aligned with DOE TREC funding. IREC sets rigorous standards for renewable energy and energy efficiency training, and accreditation from IREC signifies that the training meets or exceeds these established benchmarks. By requiring IREC-accredited training providership, the state can trust that students are enrolling in programs that adhere to industry best practices, are led by qualified instructors, and incorporate the latest advancements in energy efficiency and home performance. One lesson learned from American Recovery and Reinvestment Act (ARRA) funded training was that immature training providers rapidly entered the market resulting in quality control issues, redundant curriculum, and ultimately added expense to the government. By requiring established training providers with more than 5 years of experience as a BPI Test Center and RESNET Training Provider along with IREC accreditation, the state can ensure that BPI, RESNET, and similar training programs are conducted in the highest-quality manner, funds are not wasted standing up new training sites, and effort is not spent on developing redundant curricula. These experienced providers have demonstrated their ability to consistently deliver effective and up-to-date training, refining their programs to meet industry demands and standards. Their longevity in the field is a testament to their commitment to excellence, and choosing such providers ensures that participants receive comprehensive and relevant education.

Moreover, experienced training providers understand the challenges and nuances of educating individuals in the realm of energy efficiency and home performance. They have encountered a wide range of scenarios and can draw from their wealth of knowledge to offer practical insights and solutions to real-world problems, such as those seen in cold or warm weather climates. These providers often have a network of industry connections that can benefit participants in terms of job opportunities and ongoing support. In this way, experienced and IREC-accredited training providers not only ensure high-quality education but also foster a community of professionals dedicated to advancing the field of energy efficiency long after TREC funds have been expended.

Workforce Development Plan

Part B:

Answer the following questions:

- 1. How will you engage and collaborate with local stakeholders in the development of your plan? (Consider state departments of labor, state and local workforce boards, community & technical colleges, non-profit organizations, American Job Centers, labor**

unions, utilities, energy industry and financial companies, community-based organizations, etc.)

[STATE]'s places strong emphasis on fostering engagement and collaboration with essential local stakeholders throughout the development of the state's plan. By actively involving the [STATE] Departments of Labor, local workforce boards equipped with access to Workforce Innovation and Opportunity Act (WIOA) funding, the [STATE] community and technical college system, and non-profit organizations such as Hiring Our Heroes, Good Will, and AmeriCorps, [STATE] aims to create a robust and interconnected network. These stakeholders will play pivotal roles in various aspects of the state's plan, including student recruitment, providing diverse avenues for training funding, and facilitating the placement of individuals who have successfully completed industry certification exams. Through strategic partnerships with community-based organizations, we intend to amplify the state's reach and impact. Moreover, [STATE]'s close collaboration with these entities will facilitate the integration of trained individuals into the workforce, particularly within the context of energy efficiency and electrification retrofits as part of the HOMES and HEAR programs. This collaborative approach ensures the alignment of goals, resources, and expertise, resulting in a comprehensive and effective workforce training initiative that benefits both individuals and the broader community.

2. How will you partner with local stakeholders in the implementation of your plan?

Include the letters of support, memorandum of understanding, etc.

3. What are the existing statewide programs, initiatives, or partnerships you will leverage when developing and implementing your plan? (Describe existing workforce programs, initiatives, or partnerships and the anticipated impact from this project.)

[STATE]'s workforce training plan is strategically designed to capitalize on the reach and influence of well-established nationwide programs, initiatives, and partnerships. BPA (Building Performance Association), BPI (Building Performance Institute), RESNET (Residential Energy Services Network), IREC (Interstate Renewable Energy Council), and Everblue are integral components of the state's approach. By integrating their extensive and specialized industry expertise, [STATE] training plan gains a solid foundation. Collaborating with BPA connects us with industry leaders in building performance, while partnering with BPI grants access to state-of-the-art certification standards. RESNET's proficiency in energy efficiency assessment and IREC's dedication to renewable energy accreditation provide added credibility. Moreover, Everblue's proven expertise in training enriches the plan with pragmatic implementation strategies while allowing the flexibility to work with smaller local partners throughout the state. By harnessing the collective strengths of these entities, the

state's workforce training approach not only meets but exceeds industry requirements, positioning [STATE]'s program at the forefront of professional advancement in the field.

4. How will your plan benefit disadvantaged communities? (Check all that apply)

- Increase in skills development opportunities.
- Increase in access to pre-apprenticeships/apprenticeships.
- Increase in access to low-cost capital needed for clean energy projects.
- Increase in job quality.
- Increase in clean energy enterprise creation and contracting (e.g., minority owned or disadvantaged business enterprises).
- Increase in access to educational opportunities/certifications needed for clean energy jobs.
- Increase in clean energy jobs, job pipeline, and job training for individuals from disadvantaged communities.
- Increase in parity in clean energy technology access and adoption.
- Increase in access to resources to obtain jobs in clean energy sector.
- Other: (please list any additional benefits for disadvantaged communities not mentioned above.)

5. What internal controls for performance reporting do you have established that will identify, track and report performance against the required program goals, activities, and metrics?

[STATE] will establish a cloud-based metrics and tracking system that will accept training applications, collect contractor demographics, track applicant progress, provide for approval/disapproval, list approved contractors, and integrate with a future rebate tracking system to validate approved contractors for rebates.

6. How will you facilitate continuous improvement to incorporate stakeholder feedback and improve program design and service delivery? (i.e., work with Workforce Advisory group, etc.)

This cloud-based metrics and tracking system will have the ability to report up-to-date metrics which will allow the state to analyze the performance of the program, identify bottlenecks in the process, and highlight at risk-individuals and populations to both continually improve the system and accurately measure performance and impact. The system will integrate with a future rebate tracking system to validate approved contractors and allow for future metrics tying contractor performance back to specific training programs, industry credentials, or other data collected during training.

6.4.d State Workforce Advisory Group (½ Page)

- e. **Optional (per DOE, “states may establish”) advisory group composed of at least one-third members of the state’s intended target audience that plays an ongoing role in recommending programmatic changes.**

To ensure the continuous refinement and optimal utilization of TREC funds, [STATE] will establish a dynamic workforce advisory group. This advisory group will consist of a diverse representation including newly-entered workers, experienced incumbents, contractors, industry standard bodies, a non-profit representing the building performance industry, training providers, community colleges, local non-profit organizations, and state personnel. It will include the State Department of Labor, Workforce Development, Weatherization Assistance Program, Housing and Urban Development, other state agencies, and community nonprofits. Through quarterly meetings, this collaborative forum will actively contribute to ongoing programmatic enhancements. By harnessing the insights and expertise of these stakeholders, the state will be well-equipped to fine-tune its initiatives, respond to industry shifts, and adapt to emerging needs swiftly. This advisory group serves as a vital conduit for maintaining the relevance and effectiveness of its training efforts, ultimately driving the success of its workforce development endeavors.

6.4.e Program Evaluation Plan (2 ½ Pages)

Evaluation Plan

Summary: The state will use metrics collected to assess the performance of its own program in order to support program improvements for future phases of funding.

Statement of Work: The state will work with a third party non-profit representing the building performance industry and IREC accredited training provider that has been a BPI Test Center and RESNET Training Provider for more than 5 years to assess the effectiveness and impact of the training programs using qualitative and quantitative metrics.

Metrics: Metrics will include the number of contractors trained, the percentage of participants who successfully complete the training, the energy efficiency improvements achieved through the contractors' work, and the overall satisfaction of program participants.

Narrative: The state’s evaluation plan for TREC is designed to comprehensively assess the effectiveness and impact of the training programs. The evaluation consists of multiple components, including program progress based on program metrics, participant feedback, program design improvements, and recommendations for program improvements.

Firstly, program progress should be measured using well-defined metrics that align with the goals of the training grants. These metrics include the number of contractors trained, the percentage of participants who successfully complete the training, the energy efficiency improvements achieved through the contractors' work, and the overall satisfaction of program participants. By using software specifically developed for the building science industry by an IREC accredited organization, regular data collection and analysis will enable DOE to track the program's success over time and identify any areas for improvement.

Secondly, participant feedback is a critical aspect of the evaluation process. Surveys, interviews, or focus groups can be used to gather insights from contractors who have undergone the training. Their feedback can provide valuable information on the relevance and effectiveness of the training content, the quality of instruction, and the support provided during and after the training. Incorporating participant perspectives will help identify strengths and weaknesses of the training program from the end-users' viewpoint.

Thirdly, the evaluation plan should assess the program's design and implementation to identify areas for improvement. Analyzing the training materials, curriculum, and instructional methods will help determine if any modifications are necessary to better align the program with industry best practices and current energy efficiency standards. Additionally, the plan should consider the effectiveness of training delivery methods, whether in-person, virtual, or blended approaches, to optimize the learning experience.

Lastly, the evaluation plan should result in concrete recommendations for program improvements. Based on the data collected and analyzed, DOE can identify strategies to enhance the training program's outcomes and overall impact. These recommendations might include adjusting training content to address emerging industry trends, expanding outreach efforts to reach underserved communities, increasing support for participants in the field, or refining the evaluation process itself to ensure ongoing program improvement.

By incorporating a comprehensive evaluation plan that includes program metrics, participant feedback, program design assessments, and actionable recommendations, DOE's TREC funds can continuously improve the quality and effectiveness of their energy efficiency training programs and contribute to building a skilled workforce capable of delivering high-quality building performance contracting services.

Pre-Phase 2 Evaluation

Summary: The state will evaluate Phase 1 data prior to release of any future Phases of funding.

Metrics: [STATE] will identify 3-5 opportunities for improvement during Phase 2 and document plans to implement each.

Narrative: Prior to requesting Phase 2 Contractor Training Grant funding from DOE, the state will implement its own evaluation plan to meticulously assess its performance in the initial phase of the training program. The evaluation plan will involve a comprehensive analysis of key performance indicators, participant feedback, and program outcomes to gauge the overall effectiveness and impact of the training initiatives. By conducting a thorough assessment, the state aims to identify areas of success and areas in need of improvement. The evaluation findings will be used to inform a detailed report that demonstrates the state's commitment to accountability and continuous improvement. This data-driven approach will provide a clear understanding of the program's strengths and weaknesses, enabling the state to fine-tune its strategies and ensure that subsequent phases of the training program are even more successful in advancing energy efficiency and building performance contracting within its jurisdiction.