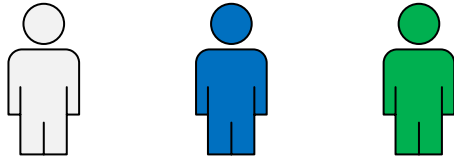


T&TA for Wx Field Staff



Candidate must demonstrate the knowledge, skills, and abilities through a series of testing to obtain national recognized Wx Certification.

What is the timeline and process for becoming EA/QCI certified?

QCI is a micro-credential of the Energy Auditor Certification. Once obtained candidates must renew on 5 Yr. Cycle.

A typical start to finish will usually take anywhere from 6-18 months. Possibly longer.

Where should I start?

Locally Required

- OSHA 10 (Wx Field Staff)
- OSHA 30 (Supervisor/ Crew Lead)
- Enhance Safety Awareness

Federally Required

EPA Lead Rennovator LSW

- Aware of LEAD Safe protocols

Examples of Specific Training

Mechanical Courses
Code Compliance
Indoor Air Quality
Mold & Moisture
Infrared Technology
Client Education
Manufactured Housing
Fundamentals

Intro to Building Science

Obtain the Building Science Principles (BSP) Certificate of Knowledge

Examples of Specific Training

Insulation 1
Insulation 2
Dense Pack Insulation
CAZ Work Shop
Pressure Diagnostics
ASHRAE Training
Energy Auditing

Building Analyst Technician (BA-T)

- Field Exam

Building Analyst Professional (BA-P)

- Written Exam

By now, candidate should have at least the following:

- 1000 Hours hands on training
- 10 audits or 6 energy auditing experience
- Training from Trade Specific that aligns with JTA's

Federally Required

Energy Auditor (EA)

- Written
- Field Exam

Candidate(s) passes exams, prepared to verify retrofit compliance with plans & standards, develops correction actions for whole house performance.

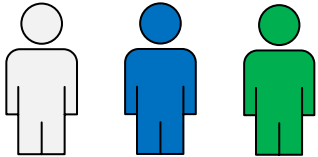
Optional Certifications

- Crew Leader (CL)
- Retrofit Installer Technician (RIT)
- Healthy Housing Principles
- Healthy Home Evaluator
- Multi-Family Building Analyst (MFBA)

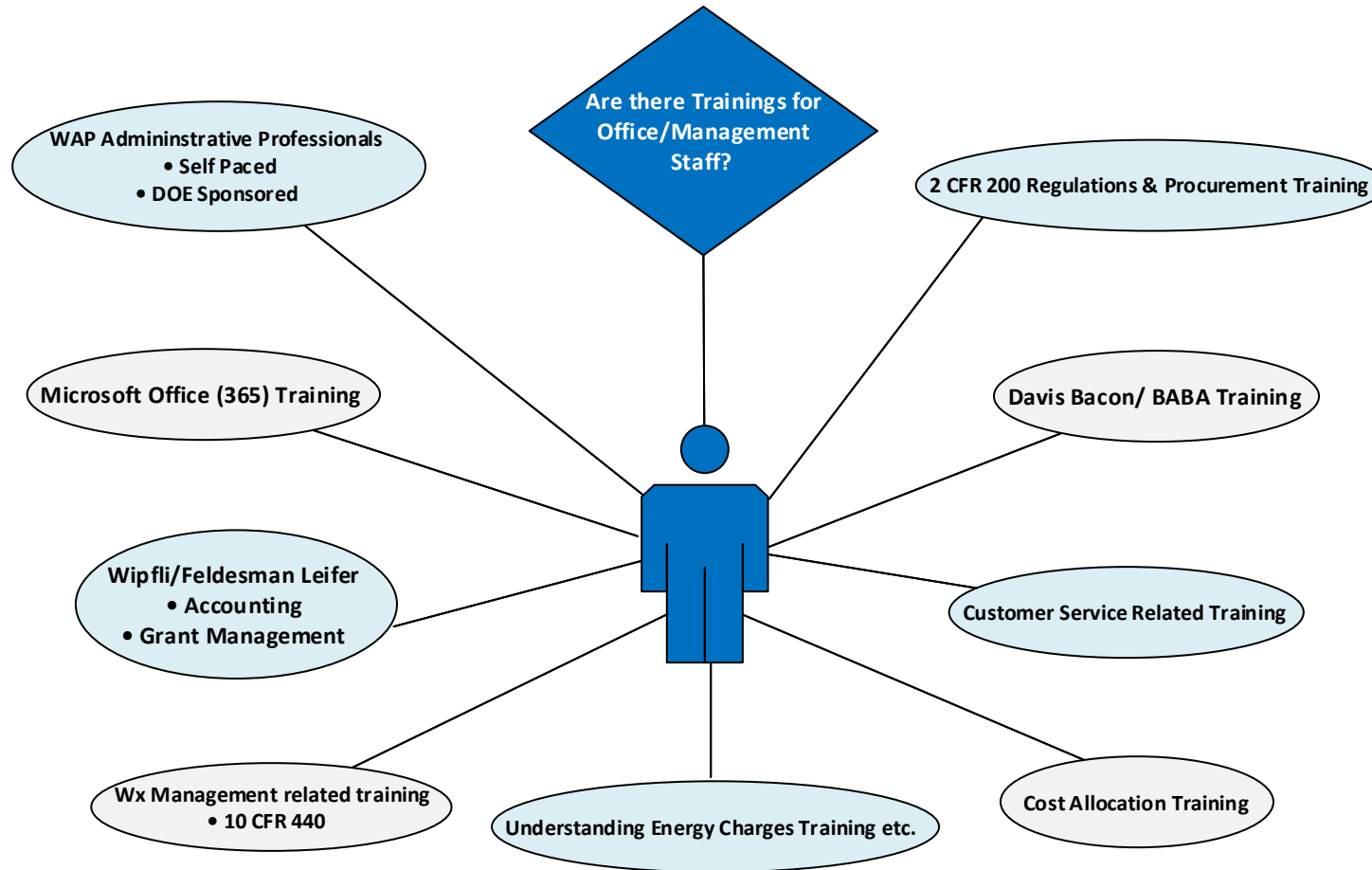
Federally Required

Quality Control Inspector (QCI)

- Written Exam



T&TA for Wx Office/Management Staff



Note: This is a non-exhaustive list, trainings shall be coordinated as applicable to Job Duties.

Can Technical & Programmatic Staff Attend Conferences?

YES

NCAP

NASCSP

HPC

Energy Out West

T&TA Available for state, federally sponsored, and other relevant workshops and conferences.

Agendas must include topics directly related to administering the program.

Potential Allowable T&TA expenditures include:

- Costs incurred in the T&TA for BPI Certifications: RIT, CL, EA/QCI.
- Providing information concerning conservation practices to occupants of eligible Applicant, (this does not include training workers to deliver client education)
- Participation, travel, logistics of training and technical assistance activities and events.
- Costs associated with training contractors that work within the Weatherization Program may also be charged to T&TA.

T&TA funds shall **not** be used to purchase vehicles or equipment for Subgrantees to perform Weatherization services. The cost of these Subgrantee vehicles or equipment to support the Program must be charged to the Vehicle/Equipment or Program Operations categories.

Programmatic/Administration Training

- Financial (i.e. 2 CFR 200) (only to attend financial training on the program)
- Management (i.e. 10 CFR 440) (only to attend WAP specific management trainings)
- Conferences/General (i.e. Community Action Partnership, Energy OutWest, Home Performance Coalition, National Association of State and Community Service Providers) Technical Training
- Comprehensive training as required by WPN 22-4)
 - See T&TA Wx Field Staff Flow Chart
- Specific Training Examples:
 - See T&TA Wx Field Staff/Wx Office/Management Flow Chart

Multifamily

- Training to ensure that individuals signing off on work in multifamily buildings have an active QCI certification and successfully complete a comprehensive training program based on the NREL Multifamily Quality Control Inspector JTA.

IREC Accredited Training Providers (from Department website): <https://irecusa.org/clean-energy-training/credentials/credential-holder-registry/>

IREC Training Facilities	
FSL Southwest Building Science Training Center	Clean Energy Center at Penn College
American Institute of Building Science	Apple Energy Group, LLC
Indiana Community Action Association	Intermountain Weatherization Training Center
Residential Energy Efficiency – Training Initiatives	CHP Energy Solutions, LLC
MiTEC Weatherization Training Center	Louisiana Housing Corporation
Montana Weatherization Training Center	Indoor Climate Research & Training
Everblue	SMOC/ Green Jobs Academy
Sante Fe Community College	Civic Works, Inc.
Association for Energy Affordability	Building Performance Center
New York State Weatherization Directors Association (NYSWDA)	Slipstream, Inc.
COAD Ohio Weatherization Training Center	Oregon Training Institute
Oklahoma Weatherization Training Center	
<i>Training Providers that are known to allow out-of-state attendees: Everblue, Santa Fe CC, Louisiana Housing Corporation & Community Housing Partner (CHP) others may depend on availability</i>	

PROCURING A TRAINING PROVIDER?

Technically, you have 3 choices: (1) Small Purchase, (2) Competitive Bid, or (3) Sealed Bid.

- *Sealed bid is an option but is not recommended by the Department for training provider contractor procurements for the following reasons: (1) slightly more formal procurement process than competitive bid; (2) higher degree of difficulty to receive qualified/completed bids; (3) does NOT allow for negotiation with prices or work scope. Sealed bids are best utilized for fixed price procurements, such as home construction builds (HOME Program).*

The Department recommends Small Purchase or Competitive Bid procurement.

Why Small Purchase?	Why Competitive Bid?
<u>Pros</u> : Process is simple and fast. Easier to collect bids via email/phone. Evaluation is based on price alone.	<u>Pros</u> : Process allows for negotiation and consideration of other factors besides price (warranty, timeliness, maintenance costs, etc.). Should result in best comprehensive bid winning.
<u>Cons</u> : Does not allow for negotiation. Does not allow for consideration of other factors besides price (warranty, timeliness, maintenance costs, etc.)	<u>Cons</u> : Process takes longer and has more requirements to meet.

Sample docs on the Department [Procurement Webpage](#):

- General Guidance on Specification Writing
- Sample RFPs
- Sample Advertisements
- Sample Policies and Criteria for Bid Evaluation

Procurement Resources

- <https://www.tdhca.state.tx.us/community-affairs/procurement/index.htm>
- [WPN 17-6 \(WAP Only\)](#)
- [2 CFR 200 \(OMB Super Circular\)](#)
- [Texas Grant Management Standards \(PDF\)](#) – TXGMS information located at (<https://comptroller.texas.gov/purchasing/grant-management/>)
- [TAC §1.404](#)

Costs for Travel for Training: Does the Subrecipient include staff travel costs when evaluating training providers, or training costs? Yes and/or no; that is up to the Subrecipient's discretion. Make sure you define this in your procurement specifications and evaluate it consistently.

- Training to Provider Out of State
 - o Cost of Training \$2,000.00 per person (6) people = \$12,000
 - o Travel Costs associated with training = \$1,500 per person x 6 = \$9,000
 - o Total Bid = \$21,000
- Training Provider Travels to Train in Texas
 - o Cost of Training \$2,000 per person (6) people = \$12,000
 - o Travel Costs for Training Staff = \$2,000
 - o Total Bid = \$14,000.00

Keep in mind, with virtual training options now, travel costs can be avoided for a decent amount of topics.

Potential Specifications for Training Provider:

Topic(s): Make sure the training provider can train/address the specific requirements so they can understand your specific goals and can properly estimate the amount of time and work related to the desired training.

Timing/Schedule/Availability: Make sure the training provider can train/address the specific topic(s) you desire within a reasonable time frame (weeks, couple months, etc). Typically, training providers are booked 2-3 months in advance, be sure to start the process as soon as possible.

Staff Experience: When procuring a training, one of the biggest factors in determining you receive good value from your training is dependent upon the specific staff/person(s) who is conducting the actual training for you. You want a trainer who knows the material and has extensive actual experience in the area being trained. Do your due diligence to ensure your bidders have staff that can meet your training needs and help improve your staff capacity.

EX1: If you are pursuing a training on grant accounting, you want a trainer who knows the rules and regulations for grant accounting, but also has done grant accounting themselves, or monitored grant accounting or similar work, etc.

EX2: If you are pursuing a training on technical WAP field topics, like CAZ testing, or air infiltration reduction, you want a trainer who knows how to run diagnostic tests, but also has done actual WAP field work, from beginning to end, so they know the complexities and variables that might be encountered in the field.

EX3: “The instructor must hold active BPI EA and QCI Certifications, Energy Auditing experience and expertise in NEAT/MHEA for single family homes preferred, and at least three years of experience training in the WAP is preferred” – Consider this for Experience and Certifications during award process. How you weigh these factors in your scoring is up to the sub.

SMALL PURCHASE

Small Purchase of training providers is commonly used because it is fastest: you can obtain three (3) quotes and choose a vendor within minutes/hours. However, not being able to consider options, or specifications (EX: training provider staff experience), other than price, can result in you having to use a vendor who might not be best for you.

Option A: Perform a small purchase procurement process for any and all training providers that allows for open and fair competition and use the lowest bidder.

Option B: Do homework (calls, website research, etc) on potential training providers, based on established/desired specifications (EX: training staff experience) to determine a “qualified vendors” list; keep this documentation in the procurement file. Then perform a small purchase procurement process for training providers, from your qualified vendors list, that allows for open and fair competition and use the lowest bidder.

Steps for Small Purchase Training Provider Procurement

Step 1: Determine Specifications	Determine what scope of work is needed (training, and from the training provider to best serve the agency’s needs. Define the scope and timeline needed.
Step 2: Analysis	Perform Cost Price Analysis (EX: internet price check) to ensure purchase cost is reasonable with current average purchase cost, etc.

Step 3: Get Bids	Small Purchase: contact at least (3) qualified vendors to provide bids to your specifications. Perform Bid Analysis and identifies perspective winner. Compare price quotes between bidders. <ul style="list-style-type: none"> - Winning bid = lowest price that meets specifications. - Perform SAM.gov search for winning bidder(s) to ensure verify the entity is not debarred.
Step 4: Complete Procurement	Finalize procurement with purchase.

COMPETITIVE BID

Competitive bid can be ideal for training provider procurement because it can allow consideration of other options, or specifications (EX: training provider staff experience, references, etc.) during the bid evaluation. The job can be advertised easily in a variety of ways to meet the requirement to promote full and open competition. The Subrecipient can also directly contact any and all potential providers, to encourage them to bid on the procurement package. Subrecipients can also define the length of contract, or agreement, to be signed with the winning vendor; it does not have to be 1-5 years, it could be as short as desired, or dependent on the completion of desired scope of work or deliverables.

Perform a competitive bid procurement process for training providers that allows for open and fair competition.

Steps for Competitive Training Provider Procurement

Step 1: Determine Specifications	Determine what scope of work is needed from the training provider to best serve the agency's needs. Define the scope and timeline needed. Identify staff involved with procurement process.
Step 2: Advertise	Publicly advertise procurement opportunity to promote full and open competition. Allow sufficient time from initial bid advertisement before bids are due. Advertise on websites, social media, applicable locations, newspapers (if needed), etc. <ul style="list-style-type: none"> • In bid, identify: <ul style="list-style-type: none"> ○ Scope of work: training topic(s) to cover, etc. ○ Scoring criteria for how bids will be evaluated (price, availability, training staff experience, references, etc.) ○ Equal Opportunity Clause ○ Protest Procedures
Step 3: Pre- Bidder Conference	Hold pre-bidders conference prior to bid submission deadline. Address all the questions potential bidders have; provide clarifying information to all potential bidders.
Step 4: Receive Bids	Receive all completed bids at deadline.
Step 5: Evaluate Bids	Evaluate bids according to internal procurement policies. Negotiation is allowed. Winning bid: Based on scoring criteria. Perform SAM.gov search for winning bidder to verify the entity is not debarred
Step 6: Price Analysis	Perform Cost Price Analysis (EX: internet price check) to ensure purchase cost is reasonable with current average purchase cost; compare bid price to each other; compare bid price to historical prices, etc.
Step 7: Complete Procurement	Finalize procurement with purchase. Sign contracts with winning contractor(s) for specified time, or deliverable, or topics to be covered. Option to renew contract for up to 4 more years (5 years total). Inform other bidders they did not win the bid.