
MICHIGAN DEPARTMENT OF HEALTH AND HUMAN SERVICES BUREAU OF COMMUNITY ACTION AND ECONOMIC OPPORTUNITY

SEPTEMBER 11, 2018



MICHIGAN DEPARTMENT OF HEALTH AND HUMAN SERVICES

Mission and Vision

Mission

The Michigan Department of Health and Human Services provides opportunities, services, and programs that promote **a healthy, safe, and stable environment for residents to be self-sufficient.**

Vision

Develop and encourage measurable health, safety and self-sufficiency outcomes that reduce and prevent risks, promote equity, foster healthy habits, and transform the health and human services system to **improve the lives of Michigan families.**



MICHIGAN DEPARTMENT OF HEALTH AND HUMAN SERVICES

MDHHS serves Michigan's **low-income population** through programs to provide financial and medical assistance.

The department also **promotes and provides statewide health services** programs such as chronic and communicable **disease prevention, immunizations, newborn screening, and environmental health.**

Additionally, the department **seeks to move people toward self-sufficiency** through employment and training services and works to prevent the abuse, neglect, & exploitation of children and vulnerable adults through direct services.



BUREAU OF COMMUNITY ACTION AND ECONOMIC OPPORTUNITY

Legislation:

Act 123 of 2003 amended Act 203 of 1981 to create a bureau of community services and a commission on economic and social opportunity within a state department to **reduce the causes, conditions, and effects of poverty and promote social and economic opportunities that foster self-sufficiency** for low income persons; to provide for the **designation of community action agencies**; and to prescribe the **powers and duties of the department, the bureau, the commission, and the community action agencies.**

BUREAU OF COMMUNITY ACTION AND ECONOMIC OPPORTUNITY

Legislation:

- MDHHS BCAEO legislatively mandated to administer the following programs:
 - U.S. Department of Health and Human Services, Community Services Block Grant (CSBG)
 - U.S. Department of Energy, Weatherization Assistance Program (WAP)

- Powers and Duties of BCAEO
 - Issue written policies and guidelines regarding the administrative and management of the federal program requirements and regulations for CSBG and WAP.
 - Community Action Designation or Rescission of Designations
 - Development and Implementation of the applicable State Plans
 - Grant management processing/Funding
 - Reporting/Closeout
 - Monitoring

BCAEO

Funding Source: U.S. Department of Energy (DOE) and LIHEAP

Weatherization Assistance Program for PY18/FY19

Annual Allocation: \$16.9 Million DOE
 \$ 6 Million LIHEAP
 \$22.9 Million

Production Goals: 2,178 dwellings

MICHIGAN'S WEATHERIZATION CHANGE VISION

We want to take Michigan's Weatherization Assistance Program to the next level by

improving program performance and quality,

expanding and enhancing support from the State Office,

and creating and maintaining a training program that includes a **state-of-the-art training facility** in Michigan.



CELICA PROJECT UPDATE

- Clean Energy for Low Income Communities Accelerator
- BCAEO partners with the State Energy Office, Northwest Michigan Community Action Agency and Cherryland Electric Cooperative.
- Fifty prior Weatherization Assistance Program clients each received benefits from nine solar panels
- Fifteen years of benefits to each client
- Nine panels during the month of August 2018 generated 122 kWh
- The Weatherization Assistance Program clients averaged a 40% reduction in total utility expense – prior to the CELICA project

THE WEATHERIZATION ASSISTANCE PROGRAM

- The U.S. Department of Energy (DOE) Weatherization Assistance Program reduces energy costs for low-income households by increasing the energy efficiency of their homes, while ensuring their health and safety.
- The program supports 8,500 jobs and provides weatherization services to approximately 35,000 homes every year using DOE funds.
- Through weatherization improvements and upgrades, these households save an average of \$283 or more every year according to a national evaluation of the program.
- Since the program began in 1976, WAP has helped improve the lives of than 7 million families through weatherization services.

WEATHERIZATION 101

➤ Key Terminology

➤ WAP – Weatherization Assistance Program

➤ DOE – Department of Energy

➤ Grantee – State entity managing the WAP

➤ Sub-grantee – Local agency or entity implementing the
WAP

WHAT UNDERPINS THE WAP (FEDERAL)?

1

Federal Statutes (Legislation)

2

Regulations (Rules) (CFR)

3

Grant Guidance (WPNs)

FEDERAL STATUTE

- (b) It is, therefore, the purpose of this part [42 USCS §§ 6861 et seq.] to develop and implement a weatherization assistance program to **increase the energy efficiency** of dwellings owned or occupied by low-income persons, reduce their total residential energy expenditures, and **improve their health and safety**, especially low-income persons who are particularly vulnerable such as the elderly, the handicapped, and children.

WAP 10 CFR 440

- **10 CFR Part 440, Final Rule (February 1, 2002)**
 - Offers interpretation and insight on 30 different topics relating to WAP, including:
 - Purpose and scope.
 - Definitions.
 - Allocation formula.
 - Minimum requirements.
 - Oversight and training.
 - Reports.
 - **Appendix A** provides standards for weatherization materials.

ROLES & RESPONSIBILITIES – SUB-GRANTEE

1

Michigan DOE State Plan

2

Community Services Policy Manual (CSPM)

3

Michigan Weatherization Field Guide

4

Health & Safety Plan

MICHIGAN DOE STATE PLAN

➤ **State Plan**

- Michigan's application to DOE for the WAP
- Specifies how the program operates in our state in a number of areas
- Guides state policy and implementation of the program in Michigan

COMMUNITY SERVICES POLICY MANUAL (CSPM

➤ **CSPM 600 Series**

- Guidance is based on federal policy and the State Plan
- Specifies guidance in accordance with DOE policy and the Michigan DOE State Plan
- Specifies how the program must run in our state

MICHIGAN WEATHERIZATION FIELD GUIDE

➤ **Field Guide**

- Gives technical guidance on standards on the measures done in the WAP
- Guidance is aligned with the NREL Standard Work Specifications (SWS), set of technical standards of work
- http://wxfieldguide.com/mi/MIWxFG_2018_SWS_edition.pdf
- <https://sws.nrel.gov/>

MICHIGAN HEALTH & SAFETY PLAN

➤ **H&S Plan**

- Developed to give specific guidance on what is allowable and what is not in terms of Health and Safety spending in the WAP
- Detailed guidance on each measure and what is allowable in the areas of
 - Addressing the issue
 - Training
 - Testing
 - Client education

ROLES & RESPONSIBILITIES – SUB-GRANTEE

➤ **Role of DOE**

- Federal Funding Source
- Policy Development and Enforcement
 - Weatherization Program Notices [WPNs]
 - Weatherization Memorandums
 - Approval of Funding Allocations and Processes
 - Approval of Grantee State Plans
- Accountability to Congress

ROLES & RESPONSIBILITIES – GRANTEE

➤ **Role of Grantee**

- Understand and implement DOE regulations
- Accountability to DOE
 - Annually complete & submit State Plan
 - Accurate quarterly reporting
 - Focus on spend out of funds & completion of production
 - Monitoring of sub-grantees
 - Quality Assurance
 - Meeting training needs of sub-grantee
 - **ACCOUNTABILITY FOR USE OF FEDERAL FUNDS!**

ROLES & RESPONSIBILITIES – SUB-GRANTEE

➤ **Role of Sub-grantee**

- Follow all federal and state regulations
- Establish production plan that allows for spend out of funds
- Communicate training needs to Grantee
- Perform high quality work
- Manage funds to maintain average cost per unit
- Manage funds within 2 CFR 200 guidance

ROLES & RESPONSIBILITIES – SUB-GRANTEE

➤ **Role of Sub-grantee**

- Share all technical information with those performing work
- Be familiar with DOE's Standard Work Specifications [SWS]
- Ensure SWS/Field Guide is followed
 - Work must follow SWS/Field Guide aligned document
 - SWS outlines what the completed task should accomplish
- Properly inspect all completions

WAP GENERAL KNOWLEDGE

- What the WAP is **NOT**
 - A block grant
 - A window and door replacement program
 - A remodel or reconstruction program
 - An automatic furnace replacement program
 - **An unskilled labor program**

WAP GENERAL KNOWLEDGE

➤ What the WAP **IS**

- A low-income energy efficiency program with a focus on health & safety
- Formula grant with federal and state regulations which **must** be followed
- Supporter of local economies
- Leading development resource for energy efficient measures in low income housing
- Highly technical demanding program
- A program that uses building science and a comprehensive, diagnostic energy audit to address indoor air quality, health and safety, baseload and seasonal load efficiency measures

WAP GENERAL KNOWLEDGE

➤ **General Information and Pointers**

- WAP is a difficult program to manage
 - High risk factors
 - Stringent technical standards
 - High liability
 - Numerous moving parts

WAP GENERAL KNOWLEDGE

➤ Realistic Expectations

- An approved application does **not** guarantee Wx services will be provided
 - A certain percentage of homes will be deferred
 - Roof leaks
 - Structural issues
 - Mold & moisture problems
 - Difficult or uncooperative clients
 - Accessibility issues – clutter, insect infestation, safety of staff & contractors, illegal activity, etc.
 - Home for sale
 - Work needed is beyond scope of Weatherization
 - Cuts of available funding

WAP GENERAL KNOWLEDGE

- The Weatherization Assistance Program [WAP] **is an energy efficiency program**
 - Measures installed are based upon expected energy savings associated with the measures – must meet savings to investment ratio of one or greater
 - **The measures must generate more dollars in energy savings during their expected lifetime than they cost to install**
 - Measures must be completed in alignment with the SWS and the Michigan Weatherization Field Guide

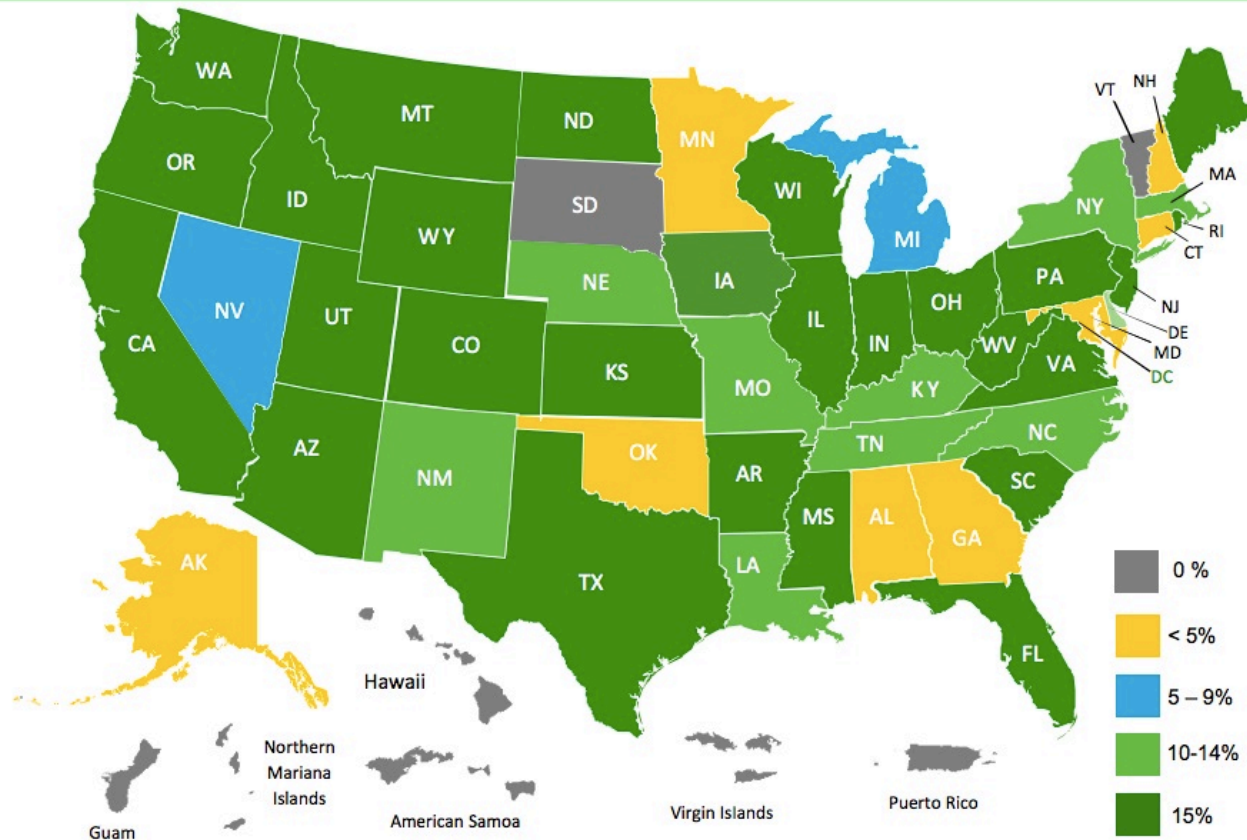
WAP GENERAL KNOWLEDGE

- The Weatherization Assistance Program [WAP] is an energy efficiency program
 - To qualify, each home must receive a **comprehensive** energy audit.
 - Energy auditors in Michigan use the NEAT (National Energy Audit Tool)
 - Energy auditors take a “whole home” approach to identify structural and systemic barriers to energy efficiency.

WAP FUNDING LEVEL EXAMPLE

State	FY 2018 Program Allocation	FY 2018 T&TA Allocation	FY 2018 Total Allocation
Illinois	\$12,372,481	\$2,327,231	\$14,699,712
Indiana	\$6,104,040	\$1,173,486	\$7,277,526
Iowa	\$4,512,306	\$880,518	\$5,392,824
Kansas	\$2,295,688	\$472,535	\$2,768,223
Kentucky	\$4,183,339	\$819,969	\$5,003,308
Louisiana	\$1,286,940	\$286,869	\$1,573,809
Maine	\$2,822,155	\$569,435	\$3,391,590
Maryland	\$2,458,032	\$502,416	\$2,960,448
Massachusetts	\$5,969,764	\$1,148,772	\$7,118,536
Michigan	\$14,254,760	\$2,673,676	\$16,928,436
Minnesota	\$9,048,732	\$1,715,475	\$10,764,207
Mississippi	\$1,439,995	\$315,040	\$1,755,035

Percentage of LIHEAP Funds Transferred (2016)



Map courtesy of
“Weatherization and LIHEAP: Fact, Fuzzy, or Fiction?”. February 2018.
 Erica Burrin, DOE,
 Holly Raveslout HHS

SUMMARY

- The basis for WAP lies in Congressional legislation.
- DOE goes through a rulemaking process to keep its regulations in compliance with statutory changes. The CFR provides general guidance on how the program should operate.
- Weatherization Program Notices (WPNs) provide specific guidance on how the program should operate. Notices are issued several times a year.
- All who are involved in operating a WAP should be familiar with DOE rules and guidance and know where to find them.
- Subgrantees should know in detail and follow how the Program is intended to operate in the State of Michigan.

WELCOME TO MITEC!



MICHIGAN'S WEATHERIZATION TRAINING CENTER



Weatherization
Education
Technology
Management
Innovation

Mission

Educate and train weatherization professionals to provide high-quality services, ensuring residents have energy-efficient, safe and healthy homes.

Vision

MiTEC will be a leader in building performance and weatherization program management by providing comprehensive, innovative training from experts in the home performance industry.

















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WEATHERIZATION TRAINING

Background

Before the Recovery Act of 2009, the **WAP network used T&TA funds to train individuals** they have already hired, and they made their own decisions about how training was provided. Some states benefited from a local weatherization training center, others sent workers to a weatherization training center in a neighboring state or a training facility that specializes in a particular training topic (e.g., heating, ventilating, and air conditioning). Some states hire independent trainers with recognized weatherization expertise, and some used agency staff to provide training. As of February 2009, prior to the passage of the Recovery Act, approximately 90% of states used state agency staff for training, approximately 75% used local agency peers for training, and approximately 70% of states used independent trainers.

WPN 15 – 4 QUALITY WORK PLAN

October 21, 2014, the Department of Energy (DOE) has **required a Quality Work Plan (QWP)** that includes a monitoring plan to **insure quality of work and adequate financial management control** at the subgrantee level.

The QWP defines specifications for **work quality, workforce training and the qualifications required for individuals** performing inspections of WAP work. It defines what constitutes a quality installation of weatherization measures, outlines how those measures are inspected and validated, and prescribes acceptable training and credentialing of workers.



Summary of the Quality Work Plan

- QCI Certification
- 100% QCI Requirement
- Comprehensive and Specific Training
- Alignment of SWS and Field Guide
- Multifamily QCI Requirement
- Final Inspection Expectations
- Heightened Awareness on Quality in the WAP

WPN 15-4 Clarified
April 5, 2018 Memo 34

WPN 15-4, SECTION 4 STATES

Beginning in Program Year 2014, Grantee training plans must include **comprehensive training for all WAP workers** that is aligned with the **NREL Job Task Analysis (JTA)** for the position in which the worker is employed.

- **Tier 1 Training:** Comprehensive, occupation-specific training which follows a curriculum aligned with the JTA for that occupation. Tier 1 training must be administered by, or in cooperation with, a training program that is accredited by a **DOE-approved accreditation organization for the JTA being taught.**
- **Tier 2 Training:** Single-issue, short-term, training to address acute deficiencies in the field such as dense packing, crawlspace, ASHRAE, etc. Conference trainings are included in this category.

Training Plans must ensure that all Weatherization field staff receives regular Tier 1 training. Each Grantee will decide on the regularity of training based on workforce needs and availability of funds. The training plan should include an analysis of training needs and a plan for meeting those needs over a defined period of time, which can span multiple Program Years. Tier 2 training can be provided on an as-needed basis, however, the majority of worker training should occur in Tier 1.



The Grantee must determine **what constitutes “regular” training**, e.g., once every 3 years, every 5 years, or within a certain time after being hired into the network, for each job category.

Training Plans must address two categories of training:

- **Comprehensive Training** (previously called “Tier I Training”): Comprehensive, occupation targeted training which follows a curriculum aligned with the JTA for that occupation. **Comprehensive Training must be administered by, or in cooperation with, a training program accredited by a DOE-approved accreditation organization for the specific JTA being taught.**

Examples of Comprehensive Training include:

- Retrofit Installer/Technician, Crew Leader, Energy Auditor and Quality Control Inspector courses delivered by Interstate Renewable Energy Center (IREC)-accredited training providers, accredited for the JTA matching the job category.

Currently, **IREC is the only accreditation body accrediting weatherization training programs.**



WPN 15-4 CLARIFIED, APRIL 5, 2018 MEMO 34

- **Specific Training** (previously called “Tier 2 Training”): Short-term training to address acute deficiencies in the field, single-issue training, conferences, and program management or leadership training is considered Specific Training since they do not encompass an entire JTA.

Examples of Specific Training include:

- On-the-job dense-pack insulation training
- State or agency training on new field guides or program guidance
- Software training for administrative personnel
- Management or leadership training seminar
- Weatherization conference sessions

Specific training may be provided by accredited or non-accredited training providers. Specific Training should be provided on an as-needed basis, as determined by monitoring reports, self surveys, or other methods.



Why an accredited training provider?

DOE requires the use of accredited training providers for regular Comprehensive Training because the accreditation process provides a 3rd-party assessment of quality of the training program.

Accredited training provider will have:

- Facilities that meet requirements, including but not limited to:
 - Lighting levels
 - Work surfaces
 - Access to potable water and restrooms
- Curriculum that has been reviewed and shown to align with the relevant JTA,
- End-of-course assessments of attendees (not just certificates of attendance),
- Course and instructor evaluations completed by students, and policies to incorporate the results into continual course improvements,
- Defined student-to-instructor ratio, with justification of how all students get practice during hands-on exercises,

WPN 15-4 Clarified
April 5, 2018 Memo 34

DOE WEATHERIZATION ASSISTANCE PROGRAM ACCREDITED TRAINING CENTER

The **accredited training** component **guarantees the existence and availability of high quality standardized training programs** within the home energy upgrade industry. For the purpose of this project, the **Interstate Renewable Energy Council (IREC) was chosen as the accreditation body** and can provide guidance to training centers on becoming accredited. IREC offers accreditation to weatherization training centers through its Credentialing Program.

IREC is the only accreditation body accrediting weatherization training programs.

Just as the Home Energy Professional Certifications ensure qualified workers in the field, **accredited training programs ensure that individuals receive the proper training to become certified Home Energy Professionals and to do the quality work that is defined in the standard work specifications.** Many people may not know the difference between certification and accreditation. In the simplest terms, an individual gets certified and **training providers get accredited.**



DOE WEATHERIZATION ASSISTANCE PROGRAM ACCREDITED TRAINING CENTER

Job Task Analyses

The Job Task Analyses (JTAs) catalogue the knowledge, skills, and abilities that a practitioner needs in order to perform a given job effectively and safely. They define what a home energy professional needs to know in order to do the job correctly.

The JTAs for **Single-Family Home Energy Upgrades** reflect the four most common job classifications in the U.S. Department of Energy's Weatherization Assistance Program (WAP) and home energy upgrade industry and are publicly available:

- [NREL Job Task Analysis: Single-Family Energy Auditor](#)
- [NREL Job Task Analysis: Single-Family Crew Leader](#)
- [NREL Job Task Analysis: Single-Family Retrofit Installer Technician](#)
- [NREL Job Task Analysis: Single-Family Quality Control Inspector](#)

Essentially, these Single-Family JTAs are used by training providers to develop coursework that can be verified and accredited by a third-party organization. By being able to verify and accredit training programs based on these JTAs, a higher level of consistency and quality is now available within the industry.



MICHIGAN'S WEATHERIZATION TRAINING CENTER

WHY A TRAINING CENTER? WHY NOW?



Training presents a prime opportunity to:

- Expand Knowledge
- Improve Performance
- Enhance Efficiency and Productivity
- Build Consistency
- Increase Employee Satisfaction
- Exceed Industry Standards
- Increase Retention Rates
- Support Succession Planning

Michigan Training Center

Benefits:

- **Reduced Cost and Time**
 - No more out-of-State Travel
- **Relevant Content**
 - Michigan Specific Rules, Regulations, and Best Practices discussed
- **Training Site Locations throughout the State**
 - Training near you or even at a job in-progress

Access to Standards

Strong State Leadership Commitment

BCAEO can HIRE Staff

Partners are engaged, ready and excited

Top Technical Experts want to be a part of the work

New Wx Staff Needs

Michigan has the Talent

Excellent Support from Volunteers in the Network

Weatherization Change Vision has Successfully Provided the Foundation

Michigan is a National Leader in Weatherization

Funding is committed and Solid

Good Collaboration

Network is Ready

New Field Guide is Awesome

Need for Consistency

In State Cert Testing

MITEC WEATHERIZATION TRAINING CENTER PY2018 GOALS

Bureau of Community Action and Economic Opportunity (BCAEO) will establish a Michigan Weatherization Training Center within 12 to 18 months from the start of the project that is **accredited by the Interstate Renewable Energy Council (IREC)** as an energy efficiency training program. IREC Training Center Accreditation is nationally recognized and provides a wide range of clean energy training programs that can be used to improve the quality and performance of the weatherization assistance program.



The following Weatherization Job Task Analyses represent the core curriculum to be offered by the Michigan Weatherization Training Center.

Job Task Analysis (JTA):

- Retro Fit Installer Technician
- Energy Auditor
- Crew Leader
- Quality Control Inspector

BCAEO will establish a high quality Weatherization Training Center with:

- Qualified Instructors
- High Quality Facilities up to 4 locations in Michigan
- Complete IREC certified curriculum
- Year round training opportunities
- Certification testing
- Props/Tools for the classroom projects and hands-on learning
- Demo houses for students to experience learning from the field
- Policies and Procedures that meet IREC standards

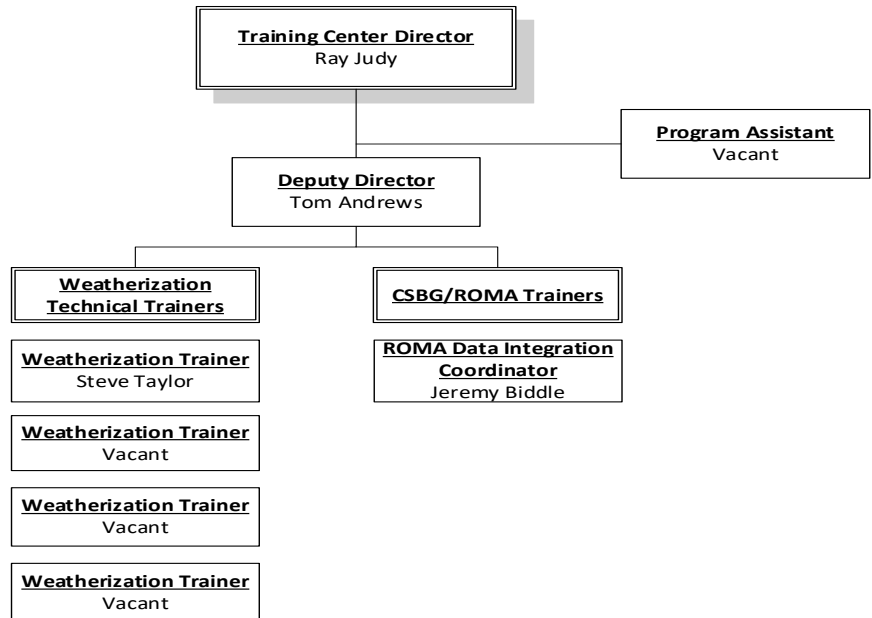
MITEC WEATHERIZATION TRAINING CENTER PY2018 GOALS

Weatherization Training Center's staffing includes the following full time affiliate positions and one contractor position.

- Weatherization Training Center Director
- Weatherization Training Center Deputy Director
- 3 Weatherization Technical Trainers
- ROMA Data Integration Coordinator
- Administrative Assistant
- Limited Term Contractor Position for the Accreditation Process

Bureau of Community Action and Economic Opportunity

MiTEC Weatherization Training Center



MITEC WEATHERIZATION TRAINING CENTER PY2018 GOALS

The BCAEO Executive Director will supervise the training center staff. The training center staff are BCAEO state employees. The training center staff will participate in all Weatherization Assistance Program's committees, team projects, field guide and audit tool reviews, conferences, webinars, and meetings that will support the implementation of the annual U.S. Department of Energy's approved State Plan.

Objective 1:

Develop, implement and establish the BCAEO Training Center.

- Hire training center staff
- Coordinating and establishing two to four training partners
- Coordinate with federal, state, and local partners
- Establish policies and procedures for the training center
- Conduct classes starting July 2018
- Evaluate trainers, contractors, and training sessions to make enhancements for the accreditation

Objective 2:

Develop and recommend Facility Plan.

- Students will need a learning environment for classroom lectures, discussions, projects, and a hands-on experience in lab environments.
- Students will need to be exposed to a variety of actual equipment and mock up situations designed to prepare them for fieldwork.



MITEC WEATHERIZATION TRAINING CENTER PY2018 GOALS

Objective 2:

Develop and recommend Training Plan. Implement approved training plan.

- Develop and recommend Training Plan for PY18 that aligns with
 - The DOE PY18 State Plan
 - The needs of the network
 - Incorporates performance improvement recommendations from monitoring
- Implement approved training plan for PY18.



Objective 3:

Develop and update Quality Control Inspector and Energy Auditor courses with Michigan's work specifications. Schedule and offer courses. Evaluate trainers/contractors/training sessions to improve performance.

- Coordinate a Weatherization Technical Team to develop Quality Control Inspector Curriculum based on the new Quality Control Inspector's JTA.
- Coordinate a Weatherization Technical Team to develop Energy Auditor Curriculum

MITEC WEATHERIZATION TRAINING CENTER PY2018 GOALS

Objective 4:

Begin the IREC accreditation process based on the Quality Control Inspector and Energy Auditor courses.

- Submit IREC Eligibility Form to IREC when the Quality Control Inspector and Energy Auditor courses have been developed and scheduled.
- Upon completion of the courses. The training center will evaluate and update the courses for performance improvements.
- Submit the IREC Certification Application for 2 JTAs; Quality Control Inspector and Energy Auditor.

Objective 5:

All T&TA activities have at least one of the following objectives:

- Maintain and increase the efficiency, quality and effectiveness of the Weatherization Assistance Program at all levels.
- Maximize energy savings.
- Ensure the health and safety of low income households and weatherization workers.
- Increase the effectiveness of client education.
- Minimize production costs and maximize production efficiencies.
- Improve the quality of weatherization work on dwellings.
- Improve program management and administrative procedures.



WEATHERIZATION ASSISTANCE PROGRAM

Questions?

Thank you

