

Subject: Minimum Requirements for Interested Electric Partnership Program (EPP) Training Providers

Purpose: To describe the standardized subject matter required of an Electric Partnership Program (EPP) training provider, so participants will meet the minimum training requirements for Baseload & Weatherization Auditing, Heat Pump and Air Conditioning measurements, and Administration of the EPP.

Training sessions for the EPP must cover specific areas in relationship to the course being taught. This section outlines the subject matter that is required for four (4) specific courses. This policy is being written in the event that a provider may wish to provide training courses with their existing staff or may be aware of an organization with an interest in providing training. All training to be provided with the intent of issuing a certificate to participants of the course and paid for with EPP funds must receive prior review and approval from the Office of Community Services (OCS).

Baseload Auditing

- Worker safety. What safety precautions must be taken while the auditor is performing inspections and testing.
- Understanding the EPP program (i.e., client demographics, the PIPP program, goals of the Universal Service Fund (USF), landlord requirements, components of the Policy and Procedures Manual, etc.).
- Understanding electric baseload usage within a home.
- Understanding the process of disaggregating a customer's electric bill to determine the electric baseload. Explaining the impact that "high" electrical baseload has on the customer's utility bill.
- Understanding how auditors can affect changes in the behavior of customers that will impact the electric usage and thus positively impact the benefit to the customer and the program. Assist this understanding by showing customers the consequences of their choices and the benefits of alternative choices, through "role playing" or other interactive methods.
- Understanding the principles of two-way communication. Understanding how adults learn and what motivates adults to change their behavior. Development of effective communication skills.
- Understanding a customer's decision to take action to reduce electric energy usage and assist them in designing an action plan of two to five "Action Items" that can be implemented.
- Understanding the Residential Appliance Audit of the SMOC~ERS software.
- Understanding how measures are determined to be cost-effective to install.
- Understanding the reports generated by the SMOC~ERS software.
- Demonstrating (through the use of the SMOC~ERS generated reports) the "high use" appliances in the home.

Whole House Auditing

- Understanding the subjects mentioned within the Baseload Auditing area.
- Understanding the Residential Weatherization Audit of the SMOC~ERS software.
- Understanding the reports generated by the SMOC~ERS software.
- Understanding the components of an initial audit on an electrically heated home, including:
 - determining existing insulation levels,
 - energy efficient heating / cooling activities, and
 - blower door and other diagnostic testing.
- Demonstrating (through the use of the SMOC~ERS generated reports) the “high use” heating and cooling usage occurring in the home.
- Understanding a customer’s decision to take action to reduce electric energy usage and assist them in designing an action plan of three to five “Action Items”. These “Action Items” should be implemented to address heating and cooling usage along with baseload.

Home Electricity, Heat Pumps and Air Conditioners

- Worker safety. Understanding the safety precautions that must be taken by the auditor when performing inspections and testing.
- Understanding the electrical systems within a home (from knob and tube wiring to proper grounding of the system).
- Understanding the operation and controls of heat pump and air conditioning systems.
- Understanding the non-intrusive diagnostic testing that must be completed to determine if the heat pumps and/or air conditioning systems are operating efficiently.
- Understanding the energy consumption of heat pumps and air conditioners to determine what cost-effective retrofits can be accomplished to make them more energy efficient.
- Understanding the communication skills necessary to inform the customer of the impact that a heat pump and/or air conditioning system has upon their utility bills, even if after the disaggregation process, the customer is considered to be a baseload candidate.

Administrator Training

- Understanding the EPP program (i.e., client demographics, the PIPP program, goals of the Universal Service Fund (USF), landlord requirements, components of the Policy and Procedures Manual, etc.).
- Understanding the Residential Appliance and Residential Weatherization components of the SMOC~ERS software and how they relate to the invoicing system.
- Understanding the reporting capabilities of the SMOC~ERS software and the required reports to be included in customer files and/or to be reported to the Office of Community Service.

- Understanding the financial aspects of the EPP program in relation to the Funding Agreement (allocations of Total Funding) and to the Monthly Financial Reporting.
- Understanding what to do with the SMOC~ERS software when the system does not operate properly (crash).

How to make an application as an approved Training Provider

A prospective training provider must have any planned training sessions approved prior to providing training to EPP providers with the intent of the participants meeting the minimum requirements required of them by the OCS. The OCS cannot guarantee any minimum number of students or training sessions. The training provider will have to market their services to the EPP Providers.

- A training provider must provide the following information in electronic format to the OCS for consideration:
 - Narrative description of experience with the Policy and Procedures used within the Electric Partnership Program.
 - Overview of course curricula being offered and how the applicant will address the training topics.
 - Minimum and maximum students per session.
 - Cost per student or session per proposed training session(s).
 - Proposed schedule of training sessions.
 - Narrative description of facility (parking availability, hotel accommodations, and food services available) or facilities specifications to accommodate training plan as described.
 - Trainer qualifications and credentials specifically with relationship to the EPP training requirements.
 - Resumes of training staff and key program staff.
 - Proposed training equipment and material needs.
 - Overview of student assessment protocol.
 - Overview of the training delivery evaluation.
 - List of training references.
 - Narrative description of the provider's management and organizational structure.
 - Proof of liability insurance (A narrative description of this coverage is adequate; however, if approved a hard copy of the Certificate of Insurance will be required.).

Upon review of the submitted materials, the OCS may request the prospective training provider to conduct a brief training session so that trainer qualifications, session format, and methods of training can be reviewed. The OCS feels that continuing education is a valuable component for all trainers in a training program. Information on past, present or planned continuing education of training staff would be beneficial.