

**Subject:** Position Specific Training Requirements

**Purpose:** To describe the training requirements of position specific duties for an individual to deliver Electric Partnership Program services efficiently and effectively.

---

All staff paid under Electric Partnership Program (EPP) must have training that allows them to deliver services efficiently and effectively. The training requirements listed below are a guideline and may not be inclusive of all of the skills needed to deliver services. Some of these requirements can be obtained through job experience or other trainings. Those items marked with an asterisk (\*) are specific to EPP and will require attendance in an EPP-approved training course. It is up to the provider of services to document and prove that staff meets these requirements.

## Auditor / Educator Requirements

- **Baseload Auditor Training** (or equivalent) including but not limited to:
  - Basic math and writing skills
  - 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.).\*
  - Technical skills including an ability to:
    - audit electric baseload;
    - diagnose causes for high electric use; and
    - suggest solutions based upon the skills / physical ability of the customer
  - Ability to disaggregate billing data into baseload and heating /cooling usage
  - Use of SMOC~ERS software to collect data and produce customer education materials\*
  - Communication, customer education and interview skills with an emphasis on adult education
  - Work with customers to develop personalized action plans\*
  - Analyze the cost-effectiveness of proposed retrofits\*
  - Patience, compassion and commitment to low-income customers
- **Whole House Auditor Training** (or equivalent) including but not limited to:
  - Basic math and writing skills
  - Understanding of EPP Policies and Procedures\*
  - Blower door use
  - Analyze existing building conditions and insulation needs
  - Duct testing
  - Heat Pump and Air Conditioning (Central units and Window units)
    - Non-intrusive diagnosis and troubleshooting
    - Impact of units on utility consumption
    - Understanding the cost-effective retrofits that can be made

- Use of SMOC~ERS software to collect data and produce customer education materials\*
  - Communication, customer education and interview skills with an emphasis on adult education
  - Analyze the cost-effectiveness of proposed retrofits\*
  - Define thermal and air barriers
- **Baseload / Consumer Education Follow- Up Training**
- This training to be developed.

## **Program Manager / Energy Coordinator Requirements**

- **Administrator Training**
- Understanding of 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.).\*
  - Understand the Residential Appliance and Residential Weatherization components of SMOC~ERS software and how they relate to the invoicing system.\*
  - Understand the reporting capabilities of SMOC~ERS software and the required reports to be included in customer files and/or to be reported to the Office of Community Services.\*
  - Understand the financial aspects of EPP in relation to the Funding Agreement (allocations of training, working capital and total funding) and to the monthly financial reporting.\*
  - Understand what to do with SMOC~ERS software when the system does not operate properly (crash).\*