



STATE OF VERMONT
JOINT FISCAL OFFICE

MEMORANDUM

To: Joint Fiscal Committee members
From: Sorsha Anderson, Senior Staff Associate
Date: May 1, 2023
Subject: Expedited Review Request – JFO #3147

Enclosed please find one (1) item, which the Joint Fiscal Office has received from the Administration. *The Department of Children and Families has requested an expedited review of JFO #3147. Please respond by Friday, May 5, 2023.*

JFO #3147 - \$2,000,000.00 to the VT Department of Children and Families, Office of Economic Development from the U.S. Department of Energy. Funds will be used to launch a VT Weatherization Training Center to support weatherization of Vermont households. This facility will be operationalized via contract to a provider and sub-grants to several community partners. The performance period ends on 2/28/2026 with an end goal of over one thousand trained specialists. This program will work in conjunction with the ARPA funded \$45M Weatherization project currently in the Office of Economic Development.
[Received April 18, 2023]

Please review the enclosed materials and notify the Joint Fiscal Office (Sorsha Anderson: sanderson@leg.state.vt.us) if you have questions or would like this item held for legislative review. Members will be polled on Friday, May 5, 2023, if they have not responded before then.

**State of Vermont**

Department of Finance & Management
109 State Street, Pavilion Building
Montpelier, VT 05620-0401

[phone] 802-828-2376
[fax] 802-828-2428

Agency of Administration

**STATE OF VERMONT
FINANCE & MANAGEMENT GRANT REVIEW FORM**

Grant Summary:	\$2M grant from US Department of Energy to support the launch of a Weatherization Training Center in Vermont.				
Date:	4/5/2023				
Department:	Department of Children and Families				
Legal Title of Grant:	Weatherization Assistance Program Enhancement & Innovation				
Federal Catalog #:	81.042				
Grant/Donor Name and Address:	US Department of Energy, Golden Field Office 15013 Denver West Parkway Golden CO 80401				
Grant Period:	From:	3/1/2023	To:	2/28/2026	
Grant/Donation	\$2,000,000				
	SFY 1	SFY 2	SFY 3	Total	Comments
Grant Amount:	\$63,922	\$273,217	\$1,662,861	\$2,000,000	
Position Information:	# Positions	Explanation/Comments			
Additional Comments:					
Department of Finance & Management	Adam Greshin	Digitally signed by Adam Greshin Date: 2023.04.05			
Secretary of Administration	Douglas Farham	(Initial) (Initial)			
Sent To Joint Fiscal Office		Date			



STATE OF VERMONT REQUEST FOR GRANT (*) ACCEPTANCE (Form AA-1)

BASIC GRANT INFORMATION				
1. Agency:		Agency of Human Services		
2. Department:		Department for Children and Families		
3. Program:		Office of Economic Opportunity, Home Weatherization Assistance Program		
4. Legal Title of Grant:		Weatherization Assistance Program Enhancement & Innovation		
5. Federal Catalog #:		81.042		
6. Grant/Donor Name and Address:				
US Department of Energy, Golden Field Office, 15013 Denver West Parkway, Golden CO 80401				
7. Grant Period:		From:	3/1/2023	To: 2/28/2026
8. Purpose of Grant:				
Develop and Launch a Vermont Weatherization Training Center				
9. Impact on existing program if grant is not Accepted:				
Vermont will not have an accredited Weatherization Training Center				
10. BUDGET INFORMATION				
	SFY 1	SFY 2	SFY 3	Comments
Expenditures:	FY 23	FY 24	FY 25	
Personal Services	\$5,803	\$13,592	\$27,558	includes indirect
Operating Expenses	\$4,369	\$10,215	\$20,554	includes indirect
Grants	\$53,750	\$249,410	\$1,614,749	
Total	\$63,922	\$273,217	\$1,662,861	
Revenues:				
State Funds:	\$	\$	\$	
Cash	\$	\$	\$	
In-Kind	\$	\$	\$	
Federal Funds:	\$63,922	\$273,217	\$1,662,861	The total grant is \$2M. There is no cost share
(Direct Costs)	\$61,174	\$266,776	\$1,649,856	
(Statewide Indirect)	\$	\$	\$	
(Departmental Indirect)	\$2,748	\$6,441	\$13,005	
Other Funds:	\$	\$	\$	
Grant (source)	\$	\$	\$	
Total	\$63,922	\$273,217	\$1,662,861	Total grant is \$2M.
Appropriation No:	3440110000		Amount:	\$63,922
				\$
				\$
				\$
				\$
				\$
				\$

STATE OF VERMONT REQUEST FOR GRANT (*) ACCEPTANCE (Form AA-1)

	Total	\$

PERSONAL SERVICE INFORMATION

11. Will monies from this grant be used to fund one or more Personal Service Contracts? Yes No
 If "Yes", appointing authority must initial here to indicate intent to follow current competitive bidding process/policy.

Appointing Authority Name: _____ Agreed by: _____ (initial)

12. Limited Service Position Information:	# Positions	Title
Total Positions	0	

12a. Equipment and space for these positions: Is presently available. Can be obtained with available funds.

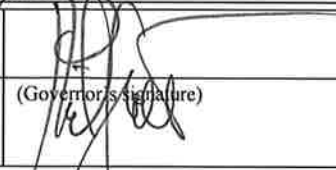
13. AUTHORIZATION AGENCY/DEPARTMENT

I/we certify that no funds beyond basic application preparation and filing costs have been expended or committed in anticipation of Joint Fiscal Committee approval of this grant, unless previous notification was made on Form AA-1PN (if applicable):	Signature:  <small>DocuSigned by: 852E32251679457...</small>	Date: 3/24/2023
	Title: DCF Commissioner	
	Signature:  <small>DocuSigned by: DC63ECCB842D481...</small>	Date: 3/24/2023
	Title: AHS Chief Financial officer	

14. SECRETARY OF ADMINISTRATION

<input checked="" type="checkbox"/> Approved:	(Secretary or designee signature)  <small>DocuSigned by: 41946B1E0A36415...</small>	Date: 4/6/2023
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15. ACTION BY GOVERNOR

<input checked="" type="checkbox"/>	Check One Box: Accepted	(Governor's signature) 
<input type="checkbox"/>	Rejected	Date: 4/14/23

16. DOCUMENTATION REQUIRED

Required GRANT Documentation	
<input checked="" type="checkbox"/> Request Memo <input type="checkbox"/> Dept. project approval (if applicable) <input checked="" type="checkbox"/> Notice of Award <input type="checkbox"/> Grant Agreement <input checked="" type="checkbox"/> Grant Budget	<input type="checkbox"/> Notice of Donation (if any) <input type="checkbox"/> Grant (Project) Timeline (if applicable) <input type="checkbox"/> Request for Extension (if applicable) <input type="checkbox"/> Form AA-1PN attached (if applicable)

End Form AA-1

(*) The term "grant" refers to any grant, gift, loan, or any sum of money or thing of value to be accepted by any agency, department, commission, board, or other part of state government (see 32 V.S.A. §5).

DocuSigned by:

A3969D1345394A5...


3/24/2023



Department for Children and Families
Commissioner's Office
280 State Drive, HC 1 North
Waterbury, VT 05671-1080
(802) 241-0929 Fax (802) 241-0950
www.dcf.vermont.gov

MEMO

TO: Department of Finance and Management
Vermont Legislative Joint Fiscal Office

FROM: Chris Winters, Commissioner 

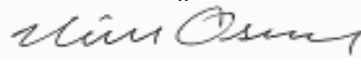
DATE: 3/16/2023

RE: Submission of AA-1 for Expedited Review

The Office of Economic Opportunity (OEO) at the Department for Children and Families (DCF) has received a grant award in the amount of \$2 Million from U.S. Department of Energy to launch a Weatherization Training Center. This will be operationalized through contract to a provider to operate the training center, along with grants to several community partners. The period of performance for this award runs from 3/1/2023 through 2/28/2026 and, given the time it takes to conduct a successful RFP and execute a contract, DCF would like to start this project as early as possible.

The sooner that this training center can be operational, the more available trained weatherization professionals there will be to support this critical work throughout the state. This will have the dual purpose of supporting a more rapid completion the \$45M Weatherization project that has been funded through ARPA State Fiscal Recovery in OEO, which requires a great number of skilled weatherization professionals to support households statewide. For these reasons, DCF is requesting an expedited review of this proposal.

ASSISTANCE AGREEMENT

1. Award No. DE-EE0010278		2. Modification No.	3. Effective Date 03/01/2023	4. CFDA No. 81.042	
5. Awarded To HUMAN SERVICES VERMONT AGENCY OF Attn: Candace Elmquist 280 State Dr Waterbury VT 056711000		6. Sponsoring Office State and Community Energy Programs U.S. Department of Energy 1000 Independence Ave, SW Washington DC 20585		7. Period of Performance 03/01/2023 through 02/28/2026	
8. Type of Agreement <input checked="" type="checkbox"/> Grant <input type="checkbox"/> Cooperative Agreement <input type="checkbox"/> Other	9. Authority Consolidated Appropriations Act 2021 Energy Act of 2020, Title I - Efficiency		10. Purchase Request or Funding Document No. 23EE000899		
11. Remittance Address HUMAN SERVICES VERMONT AGENCY OF Attn: Candace Elmquist 280 State Drive AGENCY OF HUMAN SERVICES - CO WATERBURY VT 05671		12. Total Amount Govt. Share: \$2,000,000.00 Cost Share : \$0.00 Total : \$2,000,000.00		13. Funds Obligated This action: \$300,000.00 Total : \$300,000.00	
14. Principal Investigator		15. Program Manager Brittany Price Phone: 240-306-7252		16. Administrator Golden Field Office U.S. Department of Energy Golden Field Office 15013 Denver West Parkway Golden CO 80401	
17. Submit Payment Requests To Payment - Direct Payment from U.S. Dept of Treasury		18. Paying Office Payment - Direct Payment from U.S. Dept of Treasury		19. Submit Reports To See Attachment 2	
20. Accounting and Appropriation Data 05450-2022-31-200835-41020-1004759-0000000-0000000-0000000					
21. Research Title and/or Description of Project Vermont Weatherization Training Center					
For the Recipient			For the United States of America		
22. Signature of Person Authorized to Sign			25. Signature of Grants/Agreements Officer 		
23. Name and Title		24. Date Signed	26. Name of Officer Nicholas C. Oscarsson		27. Date Signed

CONTINUATION SHEET	REFERENCE NO. OF DOCUMENT BEING CONTINUED	PAGE	OF
	DE-EE0010278	2	3

NAME OF OFFEROR OR CONTRACTOR
HUMAN SERVICES VERMONT AGENCY OF

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	<p>UEI: YLQARK22FMQ1</p> <p>In addition to this Assistance Agreement, this award consists of the items listed on the Cover Page of the Special Terms and Conditions. The Special Terms and Conditions for this award contain specific funding restrictions. Please review the applicable terms for procedures required to lift the restrictions.</p> <p>The Project Period for this award is 03/01/2023 through 02/28/2026.</p> <p>In Block 7 of the Assistance Agreement, the Period of Performance reflects the beginning of the Project Period through the end of the current Budget Year.</p> <p>Funding for all awards and future budget periods is contingent upon the availability of funds appropriated by Congress for the purpose of this program and the availability of future-year budget authority.</p> <p>DOE Award Administrator: Denise McCracken E-mail: denise.mccracken@ee.doe.gov Phone: 240-562-1485</p> <p>DOE Project Officer: Brittany Price E-mail: Brittany.price@ee.doe.gov Phone: 240-306-7252</p> <p>Recipient Business Officer: Sarah Phillips E-mail: Sarah.phillips@vermont.gov Phone: (802) 585-9218</p> <p>Recipient Principal Investigator: Joshua Larose E-mail: Joshua.larose@vermont.gov Phone: (802) 585-6697</p> <p>Electronic signature or signatures as used in this document means a method of signing an electronic message that-</p> <p>(A) Identifies and authenticates a particular person as the source of the electronic message; (B) Indicates such person's approval of the information contained in the electronic message; and, (C) Submission via FedConnect constitutes electronically signed documents.</p> <p>Continued ...</p>				

CONTINUATION SHEET	REFERENCE NO. OF DOCUMENT BEING CONTINUED	PAGE	OF
	DE-EE0010278	3	3

NAME OF OFFEROR OR CONTRACTOR
 HUMAN SERVICES VERMONT AGENCY OF

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	ASAP: YES Extent Competed: COMPETED Davis-Bacon Act: NO PI: Larose, Joshua Delivery: 03/01/2023 Delivery Location Code: 03601 Golden Field Office U.S. Department of Energy Golden Field Office 15013 Denver West Parkway Golden CO 80401 Fund: 05450 Appr Year: 2022 Allottee: 31 Report Entity: 200835 Object Class: 41020 Program: 1004759 Project: 0000000 WFO: 0000000 Local Use: 0000000				

Project Abstract/Summary

The Vermont Office of Economic Opportunity (OEO) aims to plan and launch a Weatherization Training Center to support Vermont's goals to diversify and grow the weatherization workforce to achieve the State's goal of weatherizing 120,000 homes by 2030. To achieve this goal, Vermont will need to rapidly grow a qualified workforce (5x) while also heeding Vermont's *Guiding Principles for a Just Transition*, as established by the State's Climate Council. Recruiting and training a qualified workforce is essential to delivering weatherization services which realize the energy savings intended. Currently, workers in the low-income Weatherization Assistance Program must travel several hours to NY at great expense and effort to access training, which inhibits the ability to diversify and grow the workforce at the pace required.

Growing and diversifying the workforce will require new strategies and supports for training and job placement, and a Vermont Training Center also can attract and retain additional workers to participate in scaling up weatherization. OEO, which administers Vermont's low income Weatherization Assistance Program, will partner with the Vermont Energy Investment Corporation, Vermont Works for Women, Vermont Technical College, ReSOURCE, Vermont Adult Learning and Vermont's Adult Career & Technical Education Centers to deliver an inclusive community engagement process, a DEI-informed training center design, a sustainable business plan and launch a Weatherization Training Center that effectively supports BIPOC, women, opportunity youth, and other underrepresented communities in joining the workforce.

Vermont's Weatherization Training Center will leverage existing expertise and resources of Project Partners to better coordinate and enhance training efforts to support bringing weatherization to scale. This work will build on the 2021 *Vermont Weatherization Workforce Plan* to coordinate the delivery of standardized statewide building science curriculum through both field-based and facility-based training throughout Vermont. This curriculum lays the groundwork for a career pathway in energy efficiency construction and for certification that is broadly recognized, transparent, and portable.

The proposed plan recognizes that commitment to equity applies to both planning and implementation processes and requires that currently underserved communities have a meaningful opportunity to shape the Training Center. Attention to procedural equity requires a thoughtful, deliberative, and inclusive planning process, and thus year one will be focused on engaging communities in the development of a governance structure, center design and business plan. Even as planning is undertaken, more than \$3m in one-time funding has been mobilized to support weatherization training programs to target new workers, provide hands-on learning opportunities, and offer training in underserved markets. This project will look to leverage and learn from these efforts, while working towards a sustainable, lasting infrastructure. Year two and three will support the start-up and launch of the Training Center. DOE E&I Funds will support planning and start-up costs, including capital and equipment needs.

Vermont's planning process and training center model will offer an innovative path towards workforce diversity and inclusion that is lacking in the Weatherization field nationally. By the end of the project period, more than 1,100 people will be trained, earning one or more industry-recognized credentials; at least 40% will be from underrepresented groups in the industry, and at least 70% of all new trainees will be supported with job placement.

Statement of Project Objectives
Office of Economic Opportunity
Department for Children and Families, State of Vermont
Vermont Weatherization Training Center

A. Project Objectives

The Vermont Office of Economic Opportunity (OEO) will plan and launch a Weatherization Training Center to diversify and grow the weatherization workforce needed to achieve the State's goal of weatherizing 120,000 homes by 2030.

At the end of the initial budget period (18 months), the Project Steering Committee will design a collaborative Training Center model informed by engagement with underrepresented communities. A business plan will identify a sustainable financial plan for a Training Center, and the Governing Body will have a successful bid for a Training Center Operator. At least 600 individuals will be trained by project partners (with leveraged funds) during the first two years, earning at least one or more industry-recognized credentials, with a 70% job placement rate for new trainees. At least 40% of new trainees will be from underrepresented groups.

By the end of the 2nd 18-month budget period, the Training Center and its affiliates will train and/or retrain over 500 workers in the final year, who will earn one or more industry-recognized credentials; at least 70% of new trainees will be successfully placed in jobs. At least 40% of new trainees will be from underrepresented groups in weatherization.

Collectively, the 1,100 trainees will help weatherize at least 8,000 homes of low and moderate-income Vermonters.

B. Technical Scope Summary

During the initial budget period, the Vermont Office of Economic Opportunity will convene a Steering Committee to support the development of the Vermont Weatherization Training Center. The Steering Committee, supported by the Development Partner, will undertake significant community engagement designed to support the co-creating a Training Center model to meet the needs of underrepresented groups in Vermont. During the initial period, the Steering Committee will develop a business plan, create one or more registered apprenticeships, and launch a statewide worker recruitment campaign. By the end of year one and prior to project continuation (go/no go), the Steering Committee will approve a business plan which identifies a clear governance structure and sustainable financial model. The Governing Body will identify a training center operator to support a sustainable, accredited Vermont Weatherization Training Center. By the end of the budget period (go/no go), the Governing Body will have a successful bidder to be a Training Center Operator. Project Partners will deliver training, coordinate offerings, track outcomes and share learning to inform a formal collaborative statewide Training Center model to enhance and scale up workforce development efforts.

During Budget Period 2 and by the end of year 2, the Training Center will have a facility, staff, curricula and begin enrolling workers for training. During year 3, the Training Center and its affiliates will train and/or retrain over 500 workers who will earn one or more industry-recognized credentials, and support job placement for at least 70% of new trainees. At least 40% of new trainees will be from underrepresented groups in weatherization. A final project evaluation will highlight key takeaways and provide tools for future efforts to better engage underrepresented groups in building science and weatherization careers.

C. Tasks To Be Performed

Budget Period 1 Training Center Development & Launch –

Task 1.0: Training Center Development (M1-M12)

Task Summary: OEO will convene the Project Steering Committee and enter into a subrecipient agreement with a development partner, Vermont Energy Investment Corporation (VEIC). The Steering Committee will undertake significant community engagement to clarify Vermont weatherization training needs and resources, understand existing training center models, define Vermont's Training model, and develop a business plan. The Project Steering Committee, with community input and feedback, will develop a collaborative Training Center model to coordinate, enhance and scale up workforce development efforts to support weatherization during Budget Periods 1 and 2. Even as planning is ongoing, Project partners will deliver, coordinate and report on their respective training efforts. By the end of year one, the Vermont team will have a business plan which identifies a clear model and financial plan for a sustainable, accredited Vermont Weatherization Training Center.

Subtask 1.1: Formalize Project Steering Committee (M1-M2)

Subtask Summary: OEO will convene the Project Steering Committee, formalize decision-making and meeting schedule. OEO will partner with VEIC to develop the training center and business plan under the direction of the Project Steering Committee.

- **Milestone 1.1.1** Issue Subrecipient Agreement to VEIC for Training Center Development & Business Planning

Subtask 1.2: Community Engagement (M2 – M18)

Subtask Summary: Steering Committee will engage with underrepresented communities as co-creators to support a Training Center design which meets the identified needs of target workers to successfully diversify and grow Vermont's weatherization workforce. Developed with community members, the initial community engagement plan will develop clear implementation strategies and milestones for community engagement throughout the project.

- **Milestone 1.2.1** Initial Community Engagement Plan is Finalized

Subtask 1.3: Vermont Needs & Resource Assessment (M2-M4)

Subtask Summary: Project partners and community representatives will undertake a SOAR assessment to identify Vermont Strengths, Opportunities, Aspirations and Results related to the Vermont Weatherization Training Center project.

- **Milestone 1.3.1** Written SOAR Report

Subtask 1.4: National Review of Weatherization Training Center designs and business models (M2-M4)

Subtask Summary: VEIC will conduct a national review of Weatherization Training Centers to catalogue different design options and business models.

- **Milestone 1.4.1** Written Summary of Training Center Model & Options

Subtask 1.5: Design Training Center (M5-M11)

Subtask Summary: The Steering Committee, supported by VEIC and informed by community engagement, will define the scope of work and key activities for the Training Center. Specific areas to define are identified as key milestones (progress measures) during the planning process.

The Vermont Weatherization Training Center will be a collaborative model to better coordinate, enhance and scale up workforce development efforts to support weatherization. Memorandum of Understanding (MOUs) will help to formalize the partnership as the project develops.

- **Milestone 1.5.1** Defined Career Pathway, Pre- and Apprenticeships, Certifications & Industry Recognized Credentials
- **Milestone 1.5.2** Defined Membership and Affiliate Roles
- **Milestone 1.5.3** Defined Wrap-Around Services Needs & Strategies, including Mentorship & Career Support
- **Milestone 1.5.4** Initial Summary of Facility & Equipment Needs
- **Milestone 1.5.5** Defined Learn & Earn Options
- **Milestone 1.5.6** Memorandum of Understanding (MOUs) Executed with Key Partners & Businesses
- **Milestone 1.5.7** Registered Apprenticeship Established

Subtask 1.6: Business Planning (M7-M12)

Subtask Summary: VEIC will work with the Steering committee, and with community feedback, to develop a comprehensive business plan which defines the ongoing governance, financial and marketing plan for the Training Center. Core components of the business plan are outlined in the milestones with a “Go/No Go Decision Point” at the completion of the business plan as determined by the Steering Committee.

- **Milestone 1.6.1** Defined Governance Structure
- **Milestone 1.6.2** Written Marketing & Outreach Plan
- **Milestone 1.6.3** Cost Structure Identified & Start-Up Budget (including Capital)
- **Milestone 1.6.4** Financial Projections (forecasted budget and proposed revenue streams)

- **Go/No-Go: Business Plan identifies sustainable design and financial model.**

Subtask 1.7: Training by Project Partners (leveraged funds) (M1 – M24)

Subtask Summary: Project Partners will leverage ARPA and other funds to provide training to new and incumbent workers. Training will build on the curriculum, certification and training delivery framework recommended in the Vermont Weatherization Workforce Curriculum. Project Partners will coordinate training calendars, report outcomes, and share learning. This early launch and coordination of training will help inform development of a formal Weatherization Training Center. A coordinated, statewide marketing campaign will bring awareness to career and training opportunities. Marketing will be informed by community engagement and critical to reaching underserved communities. Working with community partners on a well-designed campaign will be key. Equity training for project partners and employers (including WAP agencies) will reinforce equity goals and support welcoming, inclusive businesses prepared to train and retain a diverse workforce.

- **Milestone 1.7.1** 600 workers trained by project partners, earning one or more industry recognized credential, with a 70% job placement rate for new workers.
- **Milestone 1.7.2** Statewide Weatherization Careers Marketing Campaign Launched
- **Milestone 1.7.3** Equity Training Completed by Project Partners and Employers

Task 2.0: Launch Training Center (M13 – M18, M19 – M27)

Task Summary: OEO will establish a Governing Body for the Weatherization Training Center, which will then support the issuance of an RFP to identify a Training Center Operator. The Governing Body will define a performance-based management structure and a clear scope of work aligned with the business plan. Task 2.0 straddles Budget Period 1 and Budget Period 2, with the ability to identify a successful bidder for the Training Center as a “Go/No Go Decision Point” prior to Budget Period 2. No funds will be committed in a contract for Training Center Operator until Budget Period 2. Budget Period 2 Launch (Task 2.0) activities include hiring staff, securing facilities, and purchasing equipment.

Subtask 2.1: Establish Governing Body (M1 – M2)

Subtask Summary: The Governing Body, which will include OEO, will align with the business plan and be responsible for oversight and accountability of the Training Center.

- **Milestone 2.1.1** Defined Performance-based Management Structure & Requirements for Training Center

Subtask 2.2: Identify Training Center Operator (M15 – M18)

Subtask Summary: The Governing Body will create bidder qualifications, a request for proposals, a scoring rubric and select a legal entity to operate the Training Center.

- **Milestone 2.2.1** Issue a Request for Proposal for the Vermont Weatherization Training Center
- **Go/No-Go:** Viable Training Center Operator Proposal Identified

Additional Subtasks and Milestones related to Task 2.0 occur during Budget Period 2.

Budget Period 1 Go/No-Go Decision Points:

#1: At the end of year one, a comprehensive business plan developed by VEIC clearly defines a training model, cost structure and sustainable financial projections. Project funds will be used to support start-up and capital costs, but financial projections must identify a sustainable funding path after the end of Budget Period 2. The business plan must be supported by the Steering Committee and OEO.

#2: The Governing Body identifies a successful and viable bidder for the Training Center Operator prior to Budget Period 2. The successful bid is justified by selection criteria, including threshold criteria, and a scoring rubric.

Budget Period 2 TRAINING CENTER LAUNCH & EVALUATION

Subtask 2.2: Identify Training Center Operator (M15-M18, M19) *(cont from Budget Period 1)*

Subtask Summary: The Governing Body will identify a legal entity to operate the Training Center.

- **Milestone 2.2.2** Execute Contract for Training Center

Subtask 2.3: Hire & Train Staff (M19-M24)

Subtask Summary: The Training Operator, with community feedback, will hire and train staff to provide administration, training, mentoring and support services, and operations and maintenance.

- **Milestone 2.3.1:** All Staff for Training Center are Hired

Subtask 2.4: Secure Facilities & Equipment (M20-M27)

Subtask Summary: The Training Operator, with community feedback, will secure one or more training facilities and equipment to provide hands-on weatherization training. Emphasis will be placed on facility accessibility and local support resources to maximize participant diversity from across the state.

- **Milestone 2.4.1:** Facilities Leased and/or MOUs Executed

Task 3.0: Build Out Key Activities (M19-M30)

Task Summary: The business plan, RFP and contract will provide a framework and performance expectations, but the Training Center Operator will be responsible for filling in the many details to launch and run the Center's activities. Build out includes expanded Memorandum of Understanding (MOUs) with key partners for referrals, training, services and job placement. The Training Center Operator will finalize an operational plan for curricula, course offerings, locations and schedules, as well as how and when industry-recognized credentials will be earned by trainees. Activities and partnerships to support mentoring, coaching and worker retention will be put into place, even as early enrollment begins.

Subtask 3.1: Establish Partnerships with Affiliate Programs and Businesses (M19-M30)

Subtask Summary: The Vermont Weatherization Training Center will be a collaborative model to better coordinate, enhance and scale up workforce development efforts to support weatherization. Memorandum of Understanding (MOUs) will help to formalize the partnership as the project develops. Specifically during build out, MOUs for recruitment, training, wrap-around services, and job placement will be key.

- **Milestone 3.1.1** MOUs Executed with Partners for referrals, training, services and job placement.

Subtask 3.2: Finalize Training Curricula & Offerings, including Industry Recognized Credentials (M20-M24)

Subtask Summary: A Training Program Director will support individuals and employers in identifying training opportunities, and in verifying training program eligibility for meeting certification-specific criteria. It will provide a centralized, up-to-date calendar of training opportunities offered by the Training Center and affiliates. The Workforce Directory will identify qualified trainers and inspectors to support training delivery, as well as support outreach for continuing education. The Training Center Operator will be responsible for developing an application for demonstrating compliance with the Center's curriculum and certification framework, reviewing applications, and verifying compliance, including trainer and inspector qualifications. Finally, the Training Center will apply for accreditation.

- **Milestone 3.2.1** Establish Vermont Weatherization & Building Science Training Program Directory
- **Milestone 3.2.2** Establish Vermont Weatherization & Building Science Professionals Workforce Directory
- **Milestone 3.2.3** Application to IREC submitted for accreditation of Training Center

Subtask 3.3: Establish Wrap-Around Services including Mentoring and Coaching (M21-M27)

Subtask Summary: Wrap-around services, mentoring and coaching will be essential to support recruitment, job placement and retention of underrepresented communities in the weatherization workforce. The Training Center will leverage existing resources and programs in Vermont, such as the Child Care Financial Assistance Program; HireAbility (Voc Rehab) job counseling and work supports; business and financial coaching through Community Action Agencies, and adult education through Vermont Adult Learning and others. Intentional strategies to mentor and support BIPOC, women and gender non-binary individuals will be established during this period such as support to become certified as Minority- and Women-owned Business Enterprises (MWBs), as well as affinity networking and mentoring opportunities. The Training Center Operator will also establish one or more "learn and earn" strategies.

Subtask 3.4: Training Center Marketing & Recruitment (M21-M36)

Subtask Summary: The Training Center will launch a multi-strategy campaign to support outreach and recruitment. Materials and media will be developed, including a website. Marketing will be informed by community engagement and critical to reaching underserved communities. Training Center marketing will promote enrollment.

- **Milestone 3.4.1** Enrollment begins at the Training Center

Task 4.0: Train Workers (M25 – M36)

Task Summary: While Project Partners will coordinate and offer training during Budget Period 1, the Training Center will offer a lasting infrastructure for recruiting, training and placing new workers. During the final year, the Training Center and Affiliate Organizations will provide field- and facility-based training. Training will target young people and other new entrants to the weatherization workforce. Training will provide hands-on experiential learning opportunities for participants, as well as direct job placement and on-the-job training. The Training Operator will complete necessary steps to deliver and track training and outcomes.

- **Milestone 4.0.1** – During the quarter, 100 workers trained, earning one or more industry-recognized credentials, with a 70% job placement rate for new trainees
- **Milestone 4.0.2** - During the quarter, 125 workers trained, earning one or more industry-recognized credentials, with a 70% job placement rate for new trainees
- **Milestone 4.0.3** - During the quarter, 125 workers trained, earning one or more industry-recognized credentials, with a 70% job placement rate for new trainees
- **Milestone 4.0.4** - During the quarter, 150 workers trained, earning one or more industry-recognized credentials, with a 70% job placement rate for new trainees

Task 5.0: Project Evaluation

Task Summary: The collaborative, equity-centered, Weatherization Training Center is intended to offer a model for replication. The Project Evaluation will document key strategies, tools and partnerships that led to success in recruiting, training, and supporting individuals from underrepresented groups in home energy performance and energy efficiency. The Project Evaluation will highlight processes of community engagement and planning as well as how to achieve ongoing accountability towards equity goals.

- **Milestone 5.0.1:** Project Evaluation Report Issued

End of Project Goal:

Project Partners train more than 600 people (years 1 and 2), and the Training Center (year 3) trains more than 500 people. Trainees earn one or more industry recognized credentials; at least 70% of new trainees are successfully placed in jobs earning more than a Vermont livable wage. At least 40% of new trainees will be from underrepresented groups in building science and weatherization.

D. Project Management and Reporting

The Office of Economic Opportunity, as recipient, will be responsible for all grant management activities, including submission of project reports and deliverables. Deliverables are listed below and will be submitted to DOE by OEO along with a quarterly narrative report:

1. Subtask 1.1 - Subrecipient agreement for Training Center Development & Business Planning
2. Subtask 1.2 - Written Community Engagement Plan
3. Subtask 1.3 - SOAR (Strengths, Opportunities, Aspirations & Results) Report
4. Subtask 1.4 - Written Summary of Existing Training Center Models and Options
5. Subtask 1.5 – Training Center Design
 - Summary of Career Pathway Plan, including pre- and apprenticeships, certifications, and industry-recognized credentials
 - Written description of Training Center Membership and Affiliate Roles
 - Written Summary of Wrap-around Services: Needs and Strategies
 - Written summary of initial facility and equipment needs.
 - Written summary on “Learn & Earn” options for the Training Center
 - Executed MOUs with Key Partners & Businesses
 - Registered Apprenticeship(s) Documentation
6. Subtask 1.6 - Business Plan
 - Written Summary of Governance Structure
 - Written Marketing and Outreach Plan
 - Written Description of Cost Structure & Start-Up Budget (including Capital)
 - Financial Projections (3 years)
 - Complete Business Plan
7. Subtask 1.7 - Training by Project Partners
 - Quarterly Reports on training outcomes
 - Statewide marketing materials and sample media
8. Subtask 2.1 - Written Summary of Performance-Based Management Structure & Requirements for Training Center
9. Subtask 2.2 - Training Center Request for Proposal, Successful bid and justification, Executed Contract
10. Subtask 2.3 - Training Center position descriptions and staff bios/resumes
11. Subtask 2.4 - Training Center lease(s) and/or MOUs for facility use
12. Subtask 3.1 - Executed MOUs with Key Partners for referrals, training, services and/or job placement
13. Subtask 3.2
 - Vermont Weatherization & Building Science Training Program Directory
 - Vermont Weatherization & Building Science Professionals Workforce Directory
 - Documentation of Submission of Application for IREC Accreditation
14. Subtask 3.4 - Training Center Enrollment & Registration Materials
15. Subtask 4.1 - Training Center quarterly narrative report with training outcomes
16. Task 5.0 - Project Evaluation Report

Milestone Summary Table

Recipient Name:		Vermont Office of Economic Opportunity					
Project Title:		Vermont Weatherization Training Center					
Task No.	Task or Subtask Title	Milestone Type	Milestone Number	Milestone Description (Go/No-Go Decision Criteria)	Milestone Verification Process	Date	Quarter
1.0				TRAINING CENTER DEVELOPMENT			
1.1	Formalize Project Steering Committee	Milestone	M1.1.1	Issue Subrecipient Agreement for Training Center Development & Business Planning	Provide copy of subrecipient agreement to DOE	1	1
1.2	Community Engagement	Milestone	M1.2.1	Initial Community Engagement Plan Finalized	Written plan submitted to DOE	2	1
1.3	Vermont Needs & Resource Assessment	Milestone	M1.3.1	SOAR (Strengths, Opportunities, Aspirations & Results) Report	Summary Report submitted to DOE	4	2
1.4	National Review of Training Center models	Milestone	M1.4.1	Written Summary of Models and Options	Summary Report submitted to DOE	4	2
1.5	Design Training Center	Milestone	1.5.1	Defined Career Pathway, Pre- and Apprenticeships, Certifications & Credentials	Report submitted to DOE	6	2
1.5	Design Training Center	Milestone	1.5.2	Defined Membership and Affiliate Roles	Report submitted to DOE	7	3
1.5	Design Training Center	Milestone	1.5.3	Defined Wrap-Around Service Strategies	Report submitted to DOE	9	3
1.5	Design Training Center	Milestone	1.5.4	Initial Summary of Facility & Equipment Needs	Report submitted to DOE	9	3
1.5	Design Training Center	Milestone	1.5.5	Define Learn & Earn Options	Report submitted to DOE	9	3
1.5	Design Training Center	Milestone	1.5.6	MOUs Executed with Key Partners & Businesses	Copy of executed MOUs submitted to DOE	9	3
1.5	Design Training Center	Milestone	1.5.7	Registered Apprenticeship(s) Established	Report submitted to DOE	10	4
1.6	Business Planning	Milestone	1.6.1	Defined Governance Structure	Report submitted to DOE	9	3
1.6	Business Planning	Milestone	1.6.2	Marketing & Outreach Plan	Report submitted to DOE	9	3
1.6	Business Planning	Milestone	1.6.3	Cost Structure & Start-Up Budget Completed	Report submitted to DOE	10	4
1.6	Business Planning	Milestone	1.6.4	Financial Projections Completed	Report submitted to DOE	11	4
1.6	Business Planning	Go/No-Go Decision Pt	Go/No-Go #1	Business Plan identifies a sustainable design and financial model	Business Plan submitted to DOE	12	4
1.7	Training by Project Partners	Milestone	1.7.1	600 people trained earning >= 1 IRC, 70% job placement	Report submitted to DOE	18	6
1.7	Training by Project Partners	Milestone	1.7.2	Statewide Weatherization Careers Marketing Campaign Launched	Materials and media submitted to DOE	10	3
1.7	Training by Project Partners	Milestone	1.7.3	Equity Training Completed for Project Partners & Employers	Report submitted to DOE	12	4

TRAINING CENTER LAUNCH							
2.0							
2.1	Establish Governing Body	Milestone	2.1.1	Performance-Based Management Structure & Requirements for Training Center Established	Report submitted to DOE	14	5
2.2	Identify Training Center Operator	Milestone	2.2.1	Issue RFP for Training Center	Copy of Request for Proposal submitted to DOE	15	5
2.2	Identify Training Center Operator	Go/No-Go Decision Pt	Go/No-Go #2	Governance Body Identifies Successful Training Center Operator from Bids	Copy of Successful bid and justification for selection submitted to DOE	18	6
2.2	Identify Training Center Operator	Milestone	2.2.2	Execute Contract for Training Center	Copy of Executed Contract submitted to DOE	19	7
2.3	Hire and Train Training Center Staff	Milestone	2.3.1	All Staff for Training Center are Hired	Position descriptions and staff bios/resumes to DOE	22	8
2.4	Secure Facility & Equipment	Milestone	2.4.1	Facility Leased and/or MOUs with Partners for Facility(ies) executed	Copy of leases and/or MOUs submitted to DOE	21	7
3.0				BUILD OUT OF KEY TRAINING CENTER ACTIVITIES			
3.1	Establish Partnerships with Affiliates	Milestone	3.1.1	MOUs Executed with Key Partners for referrals, training, services and/or job placement	Copy of executed MOUs submitted to DOE	21	7
3.2	Finalize Training Curricula & Offerings	Milestone	3.2.1	Establish VT Weatherization & Building Science Training Program Directory	Copy of/link to Directory submitted to DOE	24	8
3.2	Finalize Training Curricula & Offerings	Milestone	3.2.2	Establish VT Weatherization & Building Science Professionals Workforce Directory	Copy of/link to Directory submitted to DOE	27	9
3.2	Finalize Training Curricula & Offerings	Milestone	3.2.2	Accreditation Application Submitted to IREC	Copy of Confirmed Submission sent to DOE	30	10
3.4	Center Marketing & Recruitment	Milestone	3.4.1	Enrollment Begins at Training Center	Registration Materials submitted to DOE	24	8
4.0				TRAIN WORKERS			
4.0	Training by Center	Milestone	4.0.1	Q1: 100 people trained, earning >=1 IRC	Report submitted to DOE	27	9
4.0	Training by Center	Milestone	4.0.2	Q2: 125 people trained, earning >=1 IRC	Report submitted to DOE	30	10
4.0	Training by Center	Milestone	4.0.3	Q3: 125 people trained, earning >=1 IRC	Report submitted to DOE	33	11
4.0	Training by Center	Milestone	4.0.4	Q4: 150 people trained, earning >=1 IRC	Report submitted to DOE	36	12
5.0				PROJECT EVALUATION			
5.0	Project Evaluation	Milestone	5.0.1	Project Evaluation Report Completed	Report submitted to DOE	36	12
				End of Project Goal:			
				More than 1,100 people are trained (Project Partners = 600 people in years 1 & 2; Training Center = 500 in year 3). Trainees earn one or more industry recognized credentials. At least 70% of new trainees are successfully placed in jobs earning more than a Vermont livable wage. At least 40% of new trainees are from underrepresented groups in building science and weatherization.	Report submitted to DOE	36	12