

ANNUAL TRAINING, TECHNICAL ASSISTANCE, MONITORING, AND LEVERAGING REPORT

**Paperwork Reduction Act Burden Disclosure Statement**

This data is being collected to be used by program staff to track Weatherization Assistance Program (WAP) Formula and Bipartisan Infrastructure Law (BIL)/Infrastructure Investment and Jobs Act (IIJA) Funding recipients' activities, their progress in achieving scheduled milestones, and funds expended. The data you supply will be used for enabling program staff to provide required or requested information on program activities to OMB, Congress, and the public.

Public reporting burden for this collection of information is estimated to average 2 hours per response, including the time for reviewing instructions, searching existing data sources, gathering, and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Office of the Chief Information Officer, Enterprise Policy Development & Implementation Office, IM-22, Information Collection Management Program 1910-5127, U.S. Department of Energy, 1000 Independence Ave SW, Washington, DC 20585; and to the Office of Management and Budget (OMB), OIRA, Paperwork Reduction Project 1910-5127, Washington, DC 20503.

Notwithstanding any other provision of the law, no person is required to respond to, nor shall any person be subject to a penalty for failure to comply with a collection of information subject to the requirements of the Paperwork Reduction Act unless that collection of information displays a currently valid OMB control number.

*Submission of this data is required.*

Grantee: \_\_\_\_\_ Program Year: \_\_\_\_\_ Grant Number: \_\_\_\_\_

Reporting Period: \_\_\_\_\_

**TRAINING AND TECHNICAL ASSISTANCE ACTIVITIES**

Describe the training and technical assistance (T&TA) activities conducted during the past program year including:

- Training topics, dates, number of attendees, costs, and training provider.
- An estimate of the percentage of Grantee T&TA expenditures spent on job training. Include T&TA for Grantee staff and T&TA provided to Subgrantees and paid for with Grantee T&TA.
- Client education, program evaluation, or other activities funded with DOE T&TA.
- Explanation for any variation from the approved T&TA Plan activities.
- Number of Grantee and Subgrantee workforce partnerships involving employers, leverage funded programs, and community-based organizations or labor unions including registered apprenticeships and partnerships specified in community benefits agreements, project labor agreements, T&TA retention agreements, or similar.
- A brief summary of workforce partnerships and recruitment and retention initiatives including lessons learned.

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**MONITORING ACTIVITIES**

List the subgrantees monitored during the reporting period and indicate the focus and significant findings of each monitoring activity, as appropriate. Only those official visits that would normally be reported to DOE, not routine day-to-day activities, are required. At a minimum Grantees with Subgrantees must include the following items:

- Subgrantees monitored.
- Any major findings (waste, fraud, and abuse) and resolutions.
- Trends with respect to findings, concerns or other issues.
- Identified T&TA needs in the Programmatic/Administrative, Technical and Financial topic areas.

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- Subgrantees that are considered high risk and a plan on how to resolve; and
  - Subgrantees considered high risk for other programs or program management (e.g., LIHEAP, financial management, etc.).

Direct Service Grantees must provide an overview of the monitoring activities, completed units and any missed opportunities, installation concerns and training needs.

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**WEATHERIZATION READINESS**

Provide a description of the activities completed using DOE Weatherization Readiness Funds (WRF), including at a minimum:

- The number of completed buildings and units receiving WRF by housing type.
- The average age of buildings receiving WRF.
- Nature of repairs needed. This is not an exhaustive list and Grantees may add repairs as needed.
  - Roof repair
  - Exterior wall repair
  - Interior repair (floor, ceiling, wall, etc.)
  - Foundation or subspace repair
  - Exterior drainage repairs (e.g., landscaping or gutters)
  - Plumbing repair
  - Electrical repair
  - Clean-up or remediation beyond typical scope of WAP
    - Lead paint
    - Asbestos (confirmed or suspected, including vermiculite)
    - Mold and/or moisture
    - Other – please specify
- DOE WRF expenditure per unit and building; and,
- Leveraged fund expenditure per unit and building (i.e., funds such as LIHEAP, HUD, non-federal, etc. braided with DOE WRF to make building weatherization ready).

Grantees may upload the optional Deferral Tracking Spreadsheet or other report.

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**LEVERAGING ACTIVITIES**

For each DOE-funded leveraging activity, please describe the type of project, the project highlights, the organizations providing resources, the leveraged resources (funding and completed units), the participating subgrantees, and the status and impact.

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DIVERSITY, EQUITY, INCLUSION AND ENERGY JUSTICE**

Describe actions taken to advance equity, foster a welcoming and inclusive environment in the weatherization program, support people from underrepresented groups in the weatherization workforce, and engage community-based organizations committed to workforce development, diversity and energy justice.

At a minimum the report must include the number of Minority, Women, or Veteran Owned businesses contracting with the Grantee and with Subgrantees during the program year.

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Submitted by: \_\_\_\_\_

Date: \_\_\_\_\_

Type Name: \_\_\_\_\_

Title: \_\_\_\_\_

## ANNUAL TRAINING, TECHNICAL ASSISTANCE, MONITORING, AND LEVERAGING REPORT

**INSTRUCTIONS**

The Annual Training, Technical Assistance, Monitoring, and Leveraging Report is to be submitted annually, 30 days after the end of the reporting period.

State: Name of state or tribal organization submitting the report.  
 Program Year: The beginning and ending dates (mm/dd/yy) for the Program Year reported.  
 Grant number: The seven-digit Federal identification number assigned to the grant (R999999).  
 Reporting period: The starting and ending dates (mm/dd/yy) for the reporting period for the WAP program year.

Item	Explanation
Training and Technical Assistance Activities	Please describe the training and technical assistance (T&TA) activities conducted during the past year.
Monitoring Activities	Please list the subgrantees monitored during the reporting period and indicate the focus and significant findings of each monitoring activity, as appropriate.
Weatherization Readiness	Provide a description of the activities completed using DOE Weatherization Readiness Funds (WRF).
Leveraging Activities	For each leveraging activity, please describe the type of project, the project highlights, the organizations providing resources, the leveraged resources (funding and completed units), the participating subgrantees, and the status and impact.
Diversity, Equity, Inclusion and Energy Justice	Describe actions taken to advance equity, foster a welcoming and inclusive environment in the weatherization program, support people from underrepresented groups in the weatherization workforce, and engage community-based organizations committed to workforce development, diversity and energy justice. At a minimum the report must include the number Minority, Women, or Veteran Owned businesses contracting with the Grantee and with Subgrantees during the program year

Submitted by: Signature of the person submitting the report.

Date signed.

Typed name and title of the submitter.