

**Narrative Document Template**

**Inflation Reduction Act Section 50123: State-Based Home Energy Efficiency Contractor Training Grant Program**

**October 2023**

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# **Introduction**

This is an optional template that States may use as part of their application to the State-Based Home Energy Efficiency Contractor Training Grants [Administrative and Legal Requirements Document](https://www.energy.gov/sites/default/files/2023-10/ira-50123-alrd-contractor-training-program_modification.pdf) (ALRD). This program is also known as Training for Residential Energy Contractors (TREC) and is authorized through the Inflation Reduction Act section 50123.[[1]](#footnote-2) States may use this optional template to complete their Project Narrative, as described in ALRD section 6.4. States should review the ALRD for all other required application components.

The U.S. Department of Energy (DOE) does not require States to use this template, but DOE does require States to provide the information it covers for a compliant Project Narrative submission as part of an application to the TREC ALRD. When a State completes this Narrative Document, it should demonstrate the State’s ability and intent to implement the program in accordance with the requirements of the ALRD. The Narrative Document must provide a comprehensive framework and description of all aspects of the proposed contractor training program(s). States may use existing programs/infrastructure to implement this work. However, if the funds are applied to existing programs, the funds must be applied to contractor training.

Please send any questions about this document to eeworkforceprograms@hq.doe.gov.

# **Project Narrative Template**

The template below mirrors the TREC ALRD Project Narrative, i.e., section 6.4.a through section 6.4.e. This is an optional template that States may use to structure their responses to these sections in the ALRD.

# 6.4.a Performance Metrics

## Metric Targets

Provide the following information either in a separate document or by completing the below table with targets for each performance metric, as applicable to your proposed project. If a performance metric and/or target audience is not applicable, then please enter “0” (zero) into the performance table. The project design must address the full purpose of the ALRD within the 48-month period of performance. States should consider all parts of the proposed Project Narrative, Community Benefits Plan; Workforce Development Plan; including the project design, recruitment and outreach activities, identified target audience(s), training type and length of training offered, and other factors relevant to the achievement of each of the targets for performance metrics.

*Sample Format for Project Narrative Performance Metrics Table:*

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| --- | --- | --- |
| **Performance Metric** | **Target Audience(s)** | **Planned Numeric Target for the Period of Performance** |
| Number of individuals and/or businesses enrolled in the training program. | New workers |  |
| Existing workers |  |
| Contractor firms |  |
| The percentage of individuals that completed the training program. | New workers |  |
| Existing workers |  |
| Contractor firms |  |
| The number of individuals that received a certification. | New workers |  |
| Existing workers |  |
| Contractor firms |  |
| Number and type of industry-recognized skill or business certifications obtained through program assistance. | New workers |  |
| Existing workers |  |
| Contractor firms |  |
| Number of participants from underserved or underrepresented populations  | New workers |  |
| Existing workers |  |
| Contractor firms |  |
| Number of workers newly employed; promoted within current employment; or placed in a registered apprenticeship as a result of training. | New workers |  |
| Existing workers |  |
| Contractor firms |  |
| Estimated cost of training per participant. | New workers |  |
| Existing workers |  |
| Contractor firms |  |
| Number of communities of interest served through training. | New workers |  |
| Existing workers |  |
| Contractor firms |  |

# 6.4.b Community Benefits Plan

The Project Narrative must describe how the proposed training program(s) will benefit the community through a Community Benefits Plan. The Community Benefits Plan should describe how the proposed project will 1) support meaningful community and labor engagement; (2) invest in America’s workforce; (3) advance diversity, equity, inclusion, and accessibility; and (4) contribute to the President’s goal that 40% of the overall benefits from certain Federal investments flow to disadvantaged communities (the Justice40 Initiative).

Your Community Benefits Plan can be included in your application package by submitting content into the sections below or directly uploading an existing Community Benefits Plan that addresses the prompts below.

Community Benefits Plan Resources:

* [About Community Benefits Plans](https://www.energy.gov/infrastructure/about-community-benefits-plans)
* [Community Benefit Agreement Toolkit](https://www.energy.gov/diversity/community-benefit-agreement-cba-toolkit)

## 1. Engaging Community and Labor

1. Provide a list of key community and labor stakeholders:

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* 1. Provide a well-defined plan for continued engagement:

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* 1. Provide letters of support from community or labor stakeholders, as permitted by the relevant state law, as permitted by the relevant state law, and briefly describe them below. DOE recommends including letters of support as attachments to the application package:

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1. Create a strategy for incorporating community and labor feedback into project and program plans:

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1. Describe a plan to use collective bargaining, project labor, and/or community benefits agreements:

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## 2. Investing in America’s Workforce

1. Produce plans for strong and enduring partnerships with employers:

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1. Create a process for tracking and reporting information on job quality:
	1. Estimated benefits and pay for trainees:

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* 1. Proposed outcomes for placing program graduates into high-quality jobs:

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* 1. Gathered data on job quality (e.g., pay, benefits, classification as employees, permanent jobs, predictable schedules, etc.):

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1. Propose steps to encourage participation in labor-management training partnerships, including Registered Apprenticeships and pre-apprenticeships:

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1. Develop plans to train and hire workers from declining industries:

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1. Create plans to facilitate career growth among trainees:

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## 3. Diversity, Equity, Inclusion, and Accessibility (DEIA)

1. Explain specific approaches for recruiting and training individuals from underrepresented groups or disadvantaged communities:

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1. Present strategies to promote DEIA through the delivery of wraparound services to participants:

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1. Showcase plans to promote entrepreneurship among diverse business owners:

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## 4. Justice40 Initiative

1. Determine specific disadvantaged communities targeted for enrollment in training, identified using the [White House Council of Environmental Quality’s Climate and Economic Justice Screening Tool](https://screeningtool.geoplatform.gov/):

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1. Create a plan to track applicable quantifiable, measurable, and trackable project or program benefits expected to flow to disadvantaged communities (as described in section 4.3 in the Application Instructions):

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1. Provide strategies to connect trainees with energy efficiency projects in disadvantaged communities:

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Applicants are encouraged to submit Community and Labor Partnership Documentation from established labor and community-based organizations that demonstrate the applicant’s ability to achieve the above goals as outlined in the Community Benefits Plan. Within the Community Benefits Plan, the applicant should provide specific detail on how to ensure the delivery of measurable community and jobs benefits, ideally using negotiated agreements between the applicant and the community, and/or the applicant and labor unions referred to collectively here as “Workforce and Community Agreements.” These include good neighbor agreements, community benefits agreements, community workforce agreements, project labor agreements, and other collective bargaining agreements.

# 6.4.c State Workforce Development Plan

## Workforce Development Plan: Part A

States must develop a workforce development plan as part of their Project Narrative that provides the following information outlined in this section. The workforce development plan must address the goals of the TREC by articulating how the grant project is designed from both (1) a strategic level, such as describing the planned activities for increasing the energy efficiency workforce needs of the State including devising a comprehensive workforce strategy; and (2) an operational level, such as incorporating how the comprehensive workforce strategy will be implemented and performance measured.

### Component 1. Residential Energy Workforce Needs Assessment

1. Provide a statement of need that clearly articulates the current supply of qualified skilled energy efficiency workers compared to the projected future demand (DOE encourages States to partner with State Workforce Agencies to conduct a gap analysis to identify the labor supply needed to meet the labor demands):

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1. Indicate the program(s) for which the State will use TREC funds to prepare a skilled energy efficiency workforce. Programs could include the following:

[ ]  Inflation Reduction Act Home Efficiency Rebates; and/or

[ ]  Inflation Reduction Act Home Electrification and Appliance Rebates; and/or

[ ]  Other existing or planned Federal, State-, and utility-funded incentives and financing programs, as resources exist:

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1. Identify existing programs, within a State’s jurisdiction, that meet residential energy contractor and worker needs, including a list of organizations currently provide training, credentialing, and/or wrap around services:

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1. Provide labor market information produced by Federal or State departments of labor, as well as other sources, including current rates of employment in key occupations and forecasts of growing or declining industries and wage distributions across relevant occupations:

Sources for clean energy job data:

* [U.S. Energy Employment Report](https://www.energy.gov/policy/us-energy-employment-jobs-report-useer)
* [U.S. Bureau of Labor Statistics](https://data.bls.gov/oes/#/home)

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### Component 2. Participant Outreach, Engagement, and Service Plan

1. Outline how the funds will be used to serve participants from **at least one** of the following audience(s):
	1. [ ]  New workers, especially from disadvantaged communities, for recruitment and training.

[ ]  N/A

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* 1. [ ]  Incumbent workers for upskilling and retraining.

[ ]  N/A

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* 1. [ ]  New or existing residential energy contractors for training on leadership, entrepreneurship, business management, financial management, responsible contracting, and/or other relevant skills.

[ ]  N/A

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1. Identify what methods were used to determine the need to target the selected audience(s):

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1. List the organizations that will be involved in identifying and recruiting potential participants, including labor and community-based groups:

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### Component 3. Statement of Work with Objectives, Activities, and Metrics

Provide the following information either in a separate document or by completing the table below with strategic objectives and the metrics you will use to measure performance of strategic objectives:

1. Provide three to five strategic objectives that align program funds to identified workforce needs. At least one or more objectives must focus on how program funds benefit workers and businesses in disadvantaged communities.
2. Define the metrics used to measure performance of strategic objectives:

***Aligning Goals and Objectives***

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| **Goal** | **Objectives** | **Metric(s)** |
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1. Explain activities that will incentivize workers and/or employers to pursue skills development and integration of applicable skills into existing workflows:

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1. Describe the plan for meeting workforce training needs after TREC funding is expended:

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## Workforce Development Plan: Part B

Answer the following questions:

1. How will you engage and collaborate with local stakeholders in the development of your plan? (Consider State departments of labor, State and local workforce boards, community & technical colleges, non-profit organizations, American Job Centers, labor unions, utilities, energy industry and financial companies, community-based organizations, etc.)
	* 1. Describe states involvement engaging and collaborating with stakeholders:

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1. Provide the following information either in a separate document or by completing the table below to identify stakeholders; define their roles and expertise; and identify planned activities and deliverables with each stakeholder:

b. List organizations

c. Define specific role and expertise

d. Outline activities and deliverables

*Stakeholder collaboration and engagement plans*

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| **Organizations** | **Specific role and expertise** | **Activities and deliverables** |
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* 1. How will you partner with local stakeholders in the implementation of your plan? (Describe the methods you will use to partner with these organizations, such as letters of support and/or memoranda of understanding, etc. that confirm their commitment.)

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* 1. What are the existing Statewide programs, initiatives, or partnerships you will leverage when developing and implementing your plan? (Describe existing workforce programs, initiatives, or partnerships and the anticipated impact from this project.)

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* 1. How will your plan benefit disadvantaged communities? **(Check all that apply)**

[ ]  Increase in skills development opportunities.

[ ]  Increase in access to pre-apprenticeships/apprenticeships.

[ ]  Increase in access to low-cost capital needed for clean energy projects.

[ ]  Increase in job quality.

[ ]  Increase in clean energy enterprise creation and contracting (e.g., minority owned or disadvantaged business enterprises).

[ ]  Increase in access to educational opportunities/certifications needed for clean energy jobs.

[ ]  Increase in clean energy jobs, job pipeline, and job training for individuals from disadvantaged communities.

[ ]  Increase in parity in clean energy technology access and adoption.

[ ]  Increase in access to resources to obtain jobs in clean energy sector.

[ ]  Other: (please list any additional benefits for disadvantaged communities not mentioned above.)

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* 1. What internal controls for performance reporting do you have established that will identify, track and report performance against the required program goals, activities, and metrics?

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* 1. How will you facilitate continuous improvement to incorporate stakeholder feedback and improve program design and service delivery? (i.e., work with Workforce Advisory group, etc.)

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In the case of the workforce development plans and these awards, DOE has applied the following definitions:

* **Residential energy contractors** are businesses, non-profits, and individuals that provide residential energy efficiency, electrification, and other energy services to new and existing homes in both single-family and multi-family buildings through establishing subcontracts with individuals or organizations in construction trades and other roles. Residential energy contractors may enter business agreements with other entities to accomplish tasks such as residential energy assessment, technology installation, and/or maintenance alongside activities offered through internal services.
* **Residential energy workers** are individuals, or associations of individuals, who perform residential energy services labor, often as hired by residential energy contractors. Workers may be direct employees of residential energy contractor firms or hired on a subcontracted basis to accomplish construction trades work.

# 6.4.d Workforce Advisory Group

As part of the TREC awards, States must establish an advisory group comprised of at least one-third members of the target audience as identified in component three of the workforce development plan. The advisory group should play an ongoing role in recommending programmatic changes to better achieve outcomes and guiding specifics of program design, implementation, and evaluation.

[ ]  The State confirms they will establish a workforce advisory group.

# 6.4.e Program Evaluation Plans

A portion of TREC funds will be reserved for States after they have conducted an evaluation of their program(s). States should submit preliminary plans for conducting an evaluation of TREC-funded programs, including:

* Expected timeline for program evaluation:

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* Determined components of the evaluation that should address or include, but are not limited to, the following:
	+ Progress against goals, activities, and metrics identified in section 6 of the Application Instructions and any forthcoming DOE program guidance:
	+ Feedback from program participants collected by the program:
	+ Process and program design improvements that would increase the likelihood of meeting program goals, activities, and metrics:
	+ Review of program impacts:
	+ Recommendations for improvement as identified by the program evaluation:

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* Identified evaluation questions that will assist the States in improving the program:

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# Please add your name, organization, title, and date and submit to DOE as a Microsoft Word document.

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Name (printed)

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Organization and Title

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Date

1. *See* 42 U.S.C. 18795b. [↑](#footnote-ref-2)