



Chet Culver  
Governor

DIVISION OF COMMUNITY ACTION AGENCIES  
William J. Brand, Administrator

Patty Judge  
Lt. Governor

***PROGRAM NOTICE 09-02b***

TO: Weatherization Coordinators  
FROM: Jim Newton  
DATE: December 30, 2009  
RE: Training & Technical Assistance (T&TA) Funds

The purpose of this notice is to provide guidance with respect to the allowable use of Training and Technical Assistance (T&TA) funds. The policy is being revised to extend the period of time T&TA funds may be used to cover the salaries and fringe benefits of evaluators and crew workers and the stipend for contractors while they are being trained. The change is effective with the date of this letter and cannot be applied retroactively. This notice supersedes Program Notice 09-02a.

Training and Technical Assistance (T&TA) funds may be used for the following activities:

**Obtaining training at training courses, workshops, and conferences that have a direct application and benefit to the local weatherization program and staff.**

- T&TA funds may be used to cover the costs associated with attending training such as mileage, meals, lodging, airfare, registration, etc.

**Obtaining weatherization training from a trainer.**

- T&TA funds may be used to cover the costs of trainer fees, training materials, and training room fees.
- T&TA funds may be used to cover the salaries and fringe benefits of evaluators during the time they are being trained. Payment of salaries and fringe benefits is limited to 1,040 hours for evaluators.
- T&TA funds may be used to cover the salaries and fringe benefits of crew workers during the time they are being trained. Payment of salaries and fringe benefits is limited to 160 hours for crew workers.

**Providing weatherization training to crew workers, contractors, and evaluators.**

- T&TA funds may be used to cover the costs of training materials and training room fees.
- T&TA funds may be used to cover the salaries and fringe benefits of crew workers or evaluators that provide training to new evaluators, crew workers, or contractors.

**Contractor Training**

- T&TA funds may be used to train contractors.
- T&TA funds may be used to pay contractors a stipend while they are being trained. The stipend cannot exceed \$20 per hour for a maximum of 80 hours
- In making the determination to pay for contractor training, an agency should secure a retention agreement from the contractor in exchange for the training. The agreement should stipulate that the contractor will work on, or at least bid on, WAP jobs for a period of time that is equal to the cost of the training that is provided.

**Indirect Costs**

If agency staff provide weatherization training or if weatherization staff are being trained; and the salaries and fringe benefits of the staff providing the training or receiving the training are charged to T&TA; then indirect costs may be charged to T&TA in accordance with the agency's approved indirect cost plan.

**Unallowable use of T&TA Funds**

T&TA funds cannot be used to purchase equipment or vehicles.

**Charging Costs**

The same costs cannot be charged to the T&TA budget category and the program support, labor, or HEAP Equipment/Training budget categories. For example, if experienced crew workers are training new crew workers at a house, the salary and fringe costs for the experienced and new crew workers cannot be charged to T&TA if they are also charged as labor on the house.

**Local agency documentation**

Local agencies must fully document all instances when costs are charged to the T&TA budget category. Documentation for the charges must be submitted with the regular monthly expenditure report using the DOE T&TA Expense Documentation Form. The documentation must include the names, dates, hours, and cost of the persons who received training or provided training. Other training expenses such as training materials, room fees, and mileage, meals, lodging, etc. must also be documented on the form if those costs are charged to the T&TA budget category.

Please contact us if you have questions.

Cc: Exec. Directors  
Bill Brand  
Bureau Staff  
File