



## LIHEAP Training: Examining Common Practices and Unique Approaches

LIHEAP grantees submit annual plans to the Office of Community Services each fiscal year that include an outline of training opportunities in Section 15 (see table on this page). This section allows grantees to indicate if they offer trainings for grantee staff, local agencies, and/or vendors, in addition to reporting on the frequency of these trainings — annually, biannually, or as needed.

| Section 15 of the LIHEAP Annual Plan   |  |
|--|--|
| Section 15 is the area of the annual plan in which grantees describe the training they offer regarding LIHEAP. It contains three main sections which are described below.  |  |
| Section A  | Relates to grantee staff. Grantees are asked to indicate if they provide formal training on policies and procedures; if it is done annually, biannually, or as needed; and if employees are provided with a policy manual.   |
| Section B  | Covers training for local agencies. Grantees are asked to indicate if they provide a formal training conference and/or on-site training for sub-grantees. As in Section A, grantees are asked how frequently the training happens and if sub-grantee staff receive a policy manual.              |
| Section C  | Relates to vendors. Grantees are asked if they hold a formal training conference for their vendors, in addition to being asked if policies are communicated through vendor agreements. Grantees can also indicate if they communicate policies through a vendor agreement or in a vendor manual. |
| Note: More details about the types of training grantees indicated they would offer in their Fiscal Year 2017 annual plans can be found in the <a href="#">state</a> and <a href="#">tribal</a> plans posted on the LIHEAP Clearinghouse website. |  |



### Resources for LIHEAP Training

Training Tools by the Texas Department of Housing and Community Affairs

- [Online Training Survey](#)
- Comprehensive Energy Assistance Program, [Timeline](#)
- Comprehensive Energy Assistance Program, [Service Delivery Plan Submission](#)
- Comprehensive Energy Assistance Program, [Production Schedule Tool](#)
- Comprehensive Energy Assistance Program, [Administration and Program Services Costs](#),
- LIHEAP [Priority List](#)

Minnesota Department of Commerce, [Energy Assistance Program Training with Tribal Service Provider Staff](#), December 9 -10, 2015

Hawaii Department of Human Services, [Training Overview](#)

Florida Department of Economic Opportunity, [Training Overview](#)

Maine State Housing Authority, Fiscal Year 2017 Vendor Training

- [Agenda](#)
- [Training Presentation](#)

Following the three sections described in the table above, grantees are asked if their training programs address fraud reporting and prevention. All but two state grantees indicated in their Fiscal Year 2017 annual plans that they will offer fraud prevention and awareness training.

Neither LIHEAP statute nor regulations define what type of training grantees should provide, meaning grantees can design their training programs to meet their LIHEAPs' needs and goals. For instance, grantees that run their LIHEAPs through a central office can focus on training for that staff, while grantees that use sub-grantees can design trainings to meet the needs of local administrators. The goal of LIHEAP training is that staff, at whatever level, is equipped with the knowledge and skill to administer LIHEAP correctly and efficiently. However, the type and frequency of trainings differ from grantee to grantee.

### COMMON PRACTICES IN TRAINING

Common practices for LIHEAP training by state grantees often include formal annual training on

policy and procedures for grantee staff, annual training conferences for local agencies, and fraud prevention and awareness training. As seen in Figure A.1, 90 percent of state grantees offer annual conference training for local agencies, 92 percent offer annual policy and procedures training for grantee staff, and 96 percent offer fraud awareness and prevention training.

State grantees regularly use sub-grantees to administer some component of LIHEAP. Often, these sub-grantees administer multiple social programs and benefit from LIHEAP training and refresher courses. Annual conferences, along with policy and procedure training, keep these agencies up-to-date so they can perform required tasks efficiently and effectively. Fraud prevention and reporting training is also essential for sub-grantees to help ensure [program integrity](#). LIHEAP is a fairly complex program with lots of moving parts. It is a good practice to have staff at the grantee and/or sub-grantee level trained on policy and procedures so that everyone is on the same page.

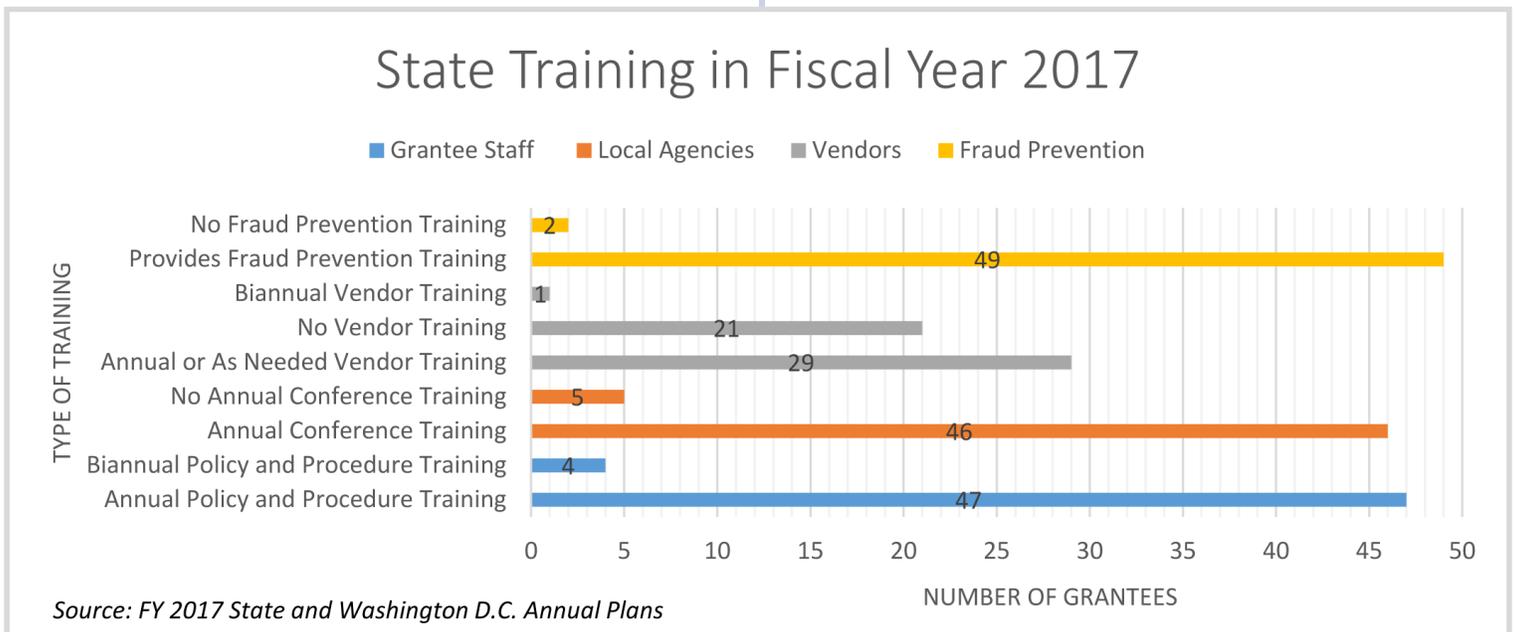


Figure A.1

LIHEAP's block grant structure allows grantees the freedom to design training that meets the needs of their programs. What one grantee incorporates into its training may not be what another grantee needs.

## Training and Technical Assistance in Texas

The Texas Department of Housing and Community Affairs (TDHCA) conducts on-going Training and Technical Assistance (TTA) including annual workshops, quarterly conference calls, a regional training series, monthly production reports, and on-site field work. All TTA is individually customized using data collected from each sub-grantee by TDHCA monitors, submitted questions, and reporting. Trainees also have the opportunity to individually address issues or identify topics that they feel should be addressed by filling out an [online form](#). When specific issues are identified, the trainings are customized to address them. TDHCA provides on-site training that includes direct field-work, process mapping, monitoring of data collection, and anything else needed to address identified issues. TDHCA also hosts regional trainings across the state, which multiple agencies attend and are specific to regional needs or based on recently-identified "hot" topics or data collections by TDHCA.

Managers for the Texas Comprehensive Energy Assistance Program (CEAP), the state's LIHEAP, receive "binders" during training which include: training tools such as current contractual requirements, the CEAP Service Delivery Plan containing a form for trainees to fill out elaborating on how they plan to administer their program services, and a flow chart walking trainees through the

many processes and components of delivery assistance to program recipients. Some of these tools are interactive worksheets that allow trainers to guide trainees through important procedures. Training tools in the binder include:

- CEAP contract for current year
- CEAP Process flowchart
- [CEAP Timeline list](#) (from website)
- [CEAP Service Delivery Plan for current program year \(webinar\)](#)
- CEAP priority sheet
- [Poverty Population per County Analysis tool](#)
- Alternative Billing Method spreadsheet for current year
- [CEAP Production Schedule Tool](#)

The TDHCA also provides sub-grantee staffers who are not managers with tools and guides during training. These tools and guides are specific to both LIHEAP and the Department of Energy's Weatherization Assistance Program (WAP). The CEAP/LIHEAP-WAP trainees are given walkthrough examples for [LIHEAP Performance Measures Module User guide](#), [LIHEAP Performance Measures Module Validations](#), [Checking CEAP reports](#), and [Frequently Asked Questions](#). Texas trainees also receive a variety of client assessment forms, including a [LIHEAP Priority Checklist](#).

## Training Local Service Providers, Tribes in Minnesota

The Minnesota Energy Assistance Program (EAP), the state's LIHEAP, uses a train-the-trainer process to extend training to local EAP staff, internal

and external agency partners, and vendors. Occasionally, the state office offers special training to targeted groups, such as sub-grantee executive directors, tribal government service providers, and new coordinators.

The EAP holds a two-day annual training every August. Two staff members from each of the program's local service providers attend the training. The state EAP staff, outside speakers from related programs, and local EAP staff present the training topics. The annual training promotes compliance with state standards and program consistency by building skills and understanding, influencing attitudes, identifying and addressing program changes, and enabling local EAP coordinators to train their staff. The training covers:

- New, changed, or clarified policies and procedures (e.g., changes to EAP's online software system called [eHEAT](#))
- New or changed tools (e.g., forms, eHEAT, etc.)
- Areas identified as needing "advancement of understanding"

For an example of an occasional training, Minnesota EAP held a two-day EAP training event for tribal-service providers from around the state, which addressed essential components for administering the EAP in tribal territories. This event addressed issues that are generally unique to tribal territories, such as what constitutes acceptable documentation and how to prove land ownership, among other topics. One of these trainings was held in December 2015 and was attended by six members from four tribal agencies. The EAP used a [PowerPoint presentation](#) that included:

- Structure and authority of the EAP
- Purpose, function, and navigation of the eHEAT system
- Calculating income, determining eligibility, and processing payments
- Assurance 16
- Data security

The Minnesota Department of Commerce, the LIHEAP grantee, also frequently communicates with local service providers through [Minnesota's Energizer](#), an electronic weekly newsletter distributed to local EAP service providers. It conveys a variety of information, including any changes to policies and procedures implemented mid-year and any enhancements to the eHEAT software system. *The Energizer* audience is the service provider community, and the state expects EAP coordinators to circulate *The Energizer* to other LIHEAP staffers and pertinent stakeholders.

## TRAINING VENDORS

LIHEAP staffers are not the only people that benefit from training about the program. The relationship between LIHEAPs and vendors is strengthened by making sure program and policy changes are communicated clearly. Many grantees do this by making sure any changes are highlighted in vendor agreements. However, some grantees take additional steps.

The Michigan Department of Health and Human Services, the LIHEAP grantee, reports that it uses the monthly meetings of the Coalition to Keep Michigan Warm to keep vendors up to date. The Coalition is comprised of organizations including energy service providers, state governmental bodies, non-profit energy assistance providers, and individual supporters with direct or indirect in-

volvement in low-income household energy issues. The LIHEAP grantee uses these meetings as a place to provide program updates and clarify policies with vendors and other stakeholders.

The Connecticut Department of Social Services, the LIHEAP grantee, in coordination with the Community Action Agencies (CAA), holds four regionalized vendor meetings around the state. A copy of the vendor agreement and information about the vendor meetings (dates, times, locations) are e-mailed or mailed to approximately 350 vendors that participated in the program the previous year. The staff from the CAAs within those regions host the meetings and a minimum of two staff from the state LIHEAP office attend the meetings, which identify the contact people at the local agencies and cover any changes in the LIHEAP program and the vendor documents from the previous year. The state LIHEAP office also participates in an annual conference hosted by the utility companies and [Operation Fuel](#), a statewide fuel fund. Workshops at the conference cover any changes to the LIHEAP program and matters pertaining to

low-income utility programs.

## SUMMARY

The flexibility grantees have to design their training plans allows them to confront unique challenges and situations their LIHEAPs may face. LIHEAP grantees can address their program's issues and opportunities on a case-by-case basis by developing their own training programs.

There are many factors to consider when creating training plans. Some of these factors are the number of employees, access to technology, funding opportunities, the convenience of a program's physical location, and the use and number of sub-grantees. Similarly, the context of a program's environment is important to consider when deciding what type of training should be provided to who, how often, and through what medium(s). The freedom to design their own plans allows grantees to directly identify essential needs of a program, address any weaknesses, and take advantage of potentially beneficial opportunities that will enhance operation of LIHEAP.

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