

# 2025 WAP DOE Training & Technical Assistance Plan

Indiana currently has **246** members in its weatherization workforce, broken down into the following categories:

- **BPI Energy Auditors:** 45
- **IN Energy Auditors:** 35
- **Quality Control Inspectors:** 52
- **Crew Leaders:** 133
- **Shell Workers:** 44
- **Mechanical Workers:** 66
- **Mechanical Helpers:** 14

IHCDA will host network-wide trainings to address specific network issues and knowledge gaps throughout the network. IHCDA will specifically provide individual meetings for sub-grantees struggling to meet benchmark goals.

Hutson Homes will target and provide additional T&TA for Subgrantees working below the current contract requirements and struggling to meet production goals. Training will evaluate and create processes in collaboration with the subgrantees. These processes will improve budgeting, production, and compliance in the Weatherization program.

All form updates are a direct reflection from the most recent DOE monitoring of IHCDA, IHCDA monitoring of sub-grantees, and internal state audits. All new training and curricula and changes to current curricula are reflective to the most recent DOE monitoring.

## Training Implemented by Hutson Homes LLC Training

1. Costs and Budgets
  - Tracking unit expenses
  - The process of approving expense sheets per unit for finance
  - Reporting unit cost in IWAP
  - Reconciling between indirect and direct unit costs
  - Reconciling direct unit cost with NEAT/MHEA
  - Finding minimum number of units required at current expenses
  - Tracking ACPU
2. Production
  - Tracking units in production
  - Managing units in production
  - Statewide weatherization database reporting
  - Moving production forward
  - Evaluate monthly goals adding to production as needed
  - Writing a process for each step of completing a unit from Audit to QCI, reporting etc...
3. Compliance
  - Work on procurement and its process
  - Tracking of CEUs and certifications
  - On boarding new employees and contractors
  - Checks and balances between financial and weatherization production
  - Inventory processes and tracking
  - Compliance check lists

Indiana utilizes T&TA to properly train all Weatherization Program Managers, Energy Auditors, Quality Control Inspectors, Crew Leaders, Retrofit Installers-SHELL/HVAC, and appropriate Grantee Staff.

Training includes those who are in-house personnel and subcontractors working for the Grantee and Subgrantees. The T&TA training also trains and teaches on Monitoring practices. Indiana's Weatherization Training Center is the Indiana Community Action Association (INCAA). INCAA is an IREC Accredited organization covering all four DOE Job Task Analyses (Energy Auditor, Quality Control Inspector, Crew Leader and Retrofit Installer Shell). INCAA received their 5 year re-accreditation on March 29, 2024. INCAA has adopted and utilizes the NREL installer badge toolkit as common practice as well.

T&TA is also utilized to provide sub-grantees with additional technical assistance in the technical and administrative aspects of Indiana's Weatherization Assistance Program. IHCDA's Policy and Technical Specialist is available daily via phone and/or email to answer programmatic questions. Subgrantees with more serious needs may schedule/request an on-site visit from IHCDA or INCAA training staff. IHCDA and INCAA work together closely to ensure that Indiana's Weatherization Assistance Network receives the necessary training to meet DOE and IHCDA requirements. Adjustments are made throughout the funding cycle as necessary to meet the T&TA needs of Indiana's Weatherization Network.

Subgrantees will be allotted a \$2,000 base award with an additional \$500 for every county serviced by the Subgrantee per reporting cycle for the purpose of providing Training and Technical Assistance for Subgrantee staff and contractors interested in performing weatherization work for the Sub-grantee. These funds may be used to cover only those expenses related to weatherization training, including:

- Class Fees
- Material Fees
- Written / Field Testing
- CEU Events
- Wage / Time reimbursement
- Travel Expenses (including meals and lodging)
- Providing reasonable meals at annual contractor trainings
- **Conferences**

Contractors must demonstrate their commitment to providing weatherization services for the Subgrantee by having an active contract with the Subgrantee before being considered for the stipend. Requests for stipends to reimburse contractors without an active contract must be reviewed by IHCDA. Subgrantees that use a stipend for contractors and staff must provide training documentation to IHCDA upon submitting claims for the stipend. Training records must contain clear documentation and verification that the required and appropriate training was attended and completed. Examples of this documentation include copies of training certificates, sign-in sheets, and BPI student portal information.

Examples of allowable courses are listed on INCAA's website, as well as those outlined in **Policy & Procedure Manual Section 10**. Subgrantees must have approval from IHCDA for classes not listed prior to attending if the stipend will be used. Other associated costs related to training not listed above must first be approved by IHCDA. Requests for additional funds will be submitted to IHCDA for review.

Indiana addresses client energy education within the courses taught at INCAA. Comprehensive client education is provided to the Weatherization program through INCAA's Client Education course; however, client education components are also covered in the Energy Auditor, Quality Control Inspector, Retrofit Installer Shell and Mechanical, and the ASHRAE 62.2 courses. Several additional courses taught at INCAA also have components of Client Education embedded into those curriculums. Indiana believes establishing a solid foundation in client education is paramount to attaining optimal energy savings, to ensuring the durability of measures installed, for improvement in indoor air quality, and for building positive relationships between the clients and the WAP personnel. All persons involved in the Indiana WAP play a vital role in establishing effective client energy education. INCAA has available the following classes and trainings for the **annual** DOE funding cycle:

- Retrofit Installer-Insulation
- Retrofit Installer-Airsealing
- Energy Auditor
- Crew Leader
- BPI Quality Control Inspector

- Zone Pressure Diagnostics
- High Performance Insulation
- Daily Safety Test Out Procedures
- Mobile Home Weatherization
- Carbon Monoxide and Combustion Analysis
- Electric Furnace & Heat Pump Inspections for Auditors/QCI's
- Electric Furnace & Heat Pump Inspections for HVAC Professionals
- Oil Furnace Training
- Boiler Inspections
- Vent Systems & Combustion Air Requirements
- Heating System Airflow Diagnostics
- Mechanical Systems for Auditors
- Mechanical Systems for HVAC Professionals
- CAZ Pressure Diagnostics for Auditors and Heating Techs
- NEAT/MHEA/MuLTEA
- Whole House Heat Load Calculations
- New Furnace Installation Inspections
- ASHRAE 62.2
- DOE Health & Safety Policy
- BPI Healthy Homes Evaluator
- Communication in Weatherization
- Water Heater Inspection
- Client Education
- SWS for Weatherization Professionals
- Introduction to Weatherization
- Lead Safe Weatherization
- Mold and Moisture Awareness
- Proctoring for BPI QCI and BPI/ISV Energy Auditor Certifications
- Optimizing Weatherization Program Resources
- OSHA 10
- SHPO Training

Indiana currently requires competency testing for all individuals performing work as an Energy Auditor, Quality Control Inspector, MF Building Analyst, and MF QCI, Retrofit Installer Shell, Retrofit Installer Mechanical and Crew Leader-Shell. The requirements and timelines for these competencies are contained in Indiana's Policy and Procedures Manual Section 10.

Subgrantees are required to ensure that all staff and contractors meet IHCDA and applicable DOE training requirements and properly track training documentation. IHCDA reviews the training documentation and tracking during their monitoring process to ensure compliance. Time Limits for becoming Indiana Weatherization Competent:

- All Subgrantee staff/contractor new employees will have 9 months commencing 45 days from their date of hire to become Indiana Weatherization Competent in the categories of Energy Auditor, Retrofit Installer (Shell and/or Mechanical) and Crew Leader.
- All Subgrantee staff/contractor new employees will have 9 months commencing 45 days from their date of start in specific training for BPI QCI to obtain BPI QCI Certification.
- Subgrantees are allowed to enroll new staff/contractor employees in training prior to the expiration of the 45 days if they choose to do so. This decision should be based upon the expectation that the new staff/contractor employee will be retained in their new position.
- Subgrantees may shorten the 45 day grace period to 30 days provided this shortened time period is approved by IHCDA and included in the Sub-grantee's policy and human resources manuals.

Each IHCDA Subgrantee is responsible for accurately tracking all staff and/or contractor competencies and certifications. This tracking must include the following information:

- Individual name and competency(s) and/or BPI certifications held
- Date competencies and/or BPI certifications expire
- Hire date
- Attendance at Annual Competency Maintenance Training
- Current BPI/INCAA Certifications where applicable
- Record of training for 12 hours of CEUs
  - IHCDA will verify training records and qualifications of all Subgrantee staff, crew members and contractors annually near the end of March. Subgrantees must be prepared to provide training documentation whenever it is requested by IHCDA. Training records must contain clear documentation and verification that the required and appropriate training was attended and completed. Examples of this documentation include copies of training certificates, sign-in sheets (conferences for example), and BPI student portal information. IHCDA may, at their discretion, monitor the tracking and completion of the required training at times other than listed in the bullet point above.

Comprehensive client education is provided to the Weatherization program through INCAA's Client Education course; however, client education components are also covered in the Energy Auditor, Quality Control Inspector, Retrofit Installer Shell and Mechanical, and the ASHRAE 62.2 courses. Several additional courses taught at INCAA also have components of Client Education embedded into those curriculums. T&TA activities that took place in Indiana during the **annual** DOE grant cycle include, but are not limited to the following:

- BPI Quality Control Inspector certification training and testing activities
- BPI Energy Auditor certification training and testing activities
- BPI Multifamily Building Analyst training and certification activities (\*\* NOTE: INCAA did not provide this training in 2025 DOE grant year)
- BPI Healthy Home Evaluator training
- Indiana Competency training and testing for Energy Auditor
- Indiana Competency training and testing for Retrofit Installer Mechanical, Retrofit Installer Shell & Crew Leader
- ASHRAE 62.2 - 2016 Training
- SWS for Weatherization Professionals
- Participation in and attendance by IHCDA staff to both NASCSP Conference. Attendance by INCAA Training Team Leader to Winter NASCAP Conference
- On-site T&TA at IHCDA provided by NASCSP
- Sub-grantee on-site T&TA activities statewide with IHCDA staff
- Sub-grantee on-site T&TA activities statewide with INCAA training staff
- Two (2) Semi-Annual Managers Meetings, hosted by IHCDA
- Three (3) Technical Trainings, hosted by INCAA
- Four (4) Competency Maintenance Refresher Courses hosted by INCAA
- Certification/Competency Maintenance Trainings T&TA for Indiana's Field Guide/SWS document
- INCAA Community Action State Conference which included a Weatherization Track
- Maintenance of Indiana's site built and mobile home waiver audits
- Increased training on NEAT/MHEA/MulTEA auditing software
- INCAA Training Team Leader and additional Technical Training Specialist attendance at Energy Outwest and HPC
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T&TA Activities anticipated to take place during the **annual** DOE Funding Cycle include, but are not limited to the following:

- Continued testing for BPI QCI and BPI and ISV Energy Auditor Certification
- Testing for BPI Crew Leader Certification
- Verification of Retrofit Installer skills for badges to attain RIS Certification
- Testing for BPI Healthy Home Evaluator Certification
- Continued participation and attendance to NASCSP Conferences Continued training and testing for Indiana's competencies

- Work with Sub-grantees and INCAA training staff to develop quarterly "Best Practice" T&TA meetings that allow:
  - Weatherization staff to share successful processes and practices
  - Provide Optimizing Weatherization Resources Training for Sub-grantee Executive Directors & financial staff
- Provide RRP initial and refresher training for Indiana's Weatherization Network Provide OSHA 10-hour training opportunities
- Enhanced focus on NEAT/MHEA/MulTEA training and use within Indiana's Weatherization Network
- Research and Development by INCAA on improving forms, researching current practices, etc.
- Provide MULTEA training for Multi-Family audits

In 2019, Indiana received the energy savings results from PRISM/BEAcon to evaluate energy savings at each subgrantee. This program was used to evaluate one year pre- and post-weatherization utility usage of metered fuels. These results are shared with sub-grantees revealing their individual results along with the state averages. Each sub-grantee is encouraged to evaluate the savings information to see how they performed individually and in comparison to the state average. The information shared from PRISM/BEAcon also breaks down the performance of each contractor and energy auditor. Subgrantees are also encouraged to look at this information to identify top performers and those who may need additional training or oversight. In the past, savings information was utilized as part of Indiana's incentive pool for future and active funding opportunities. In PY **2025** IHCDA does not plan to use the incentive pool, because the energy savings data is not available from the previous program year.

**Below are the increased allocation guidelines if IHCDA opts to use:**

Sub-grantees are encouraged to use energy analysis and evaluations in program decisions. IHCDA will hold back a certain percentage that can be given out on request to sub-grantees who have spent out their allocation.

Indiana may opt to utilize an increased allocation process in conjunction with issuing funding allocations that promotes energy savings and sound program management. **DOE** allocations are distributed using the census-based allocation formula for 50% of Weatherization sub-grantees contracted funds. IHCDA will review benchmarks yearly and allocate as necessary. The remaining 50% of the allocation is distributed out to those Weatherization sub-grantees who meet all of the following criteria:

1. 90% or more of the prior reporting cycle contract total must have been expended.
2. Annual Closeout Reports must be submitted and approved on time (within 45 days after the annual reporting cycle ends). IHCDA DMS, IWAP Quarterly, Job Expense and sub-grantee annual closeout report must match exactly when final claims are processed, with all line items and averages being within allowable limits.
3. No Weatherization sub-grantee operating under a 120-day or modified Quality Improvement Plan (QIP) will be included in the increased allocation process.
4. Weatherization sub-grantees must demonstrate regular use of the XRF for lead based paint testing.
5. Sub-grantee must meet the 45 day requirement for vendor and sub-contractor payments

**To meet requirements within [WPN 22-4](#) IHCDA added the following language to their Subgrantee contracts:**

"Subgrantee shall perform weatherization services during the Term in accordance with the U.S. Department of Energy Weatherization Assistance Program State Plan for the State of Indiana, the Indiana Weatherization Field Guide, the Indiana Weatherization Policy and Procedures Manual, other State Weatherization directives as applicable, and any amendments thereto (collectively "State Weatherization Plan and Directives"). Upon completion of the document aligning Indiana's Weatherization Field Guide and DOE's Standard Work Specifications (SWS), Subgrantee shall abide by and perform all work in accordance with said document. The Sub-grantee's signature on this agreement signifies its responsibility to follow all work standards as outlined in the documents referenced in this paragraph."

"Subgrantee shall ensure that all Weatherization staff and sub-contractors who perform or provide Weatherization services to client units receive and adhere to all standards as outlined in Indiana's Weatherization Field Guide, Indiana's Weatherization Policy and Procedures Manual, the Department of Energy Weatherization Assistance Program State Plan for Indiana and other State Weatherization directives as applicable. Upon completion of the document aligning Indiana's Weatherization Field Guide and DOE's Standard Work Specifications (SWS), sub-grantee shall abide by and perform all work in accordance with said document. The sub-grantee's signature on this agreement signifies its responsibility to follow all work standards as outlined in the documents referenced in this paragraph as well as its responsibility to ensure that its Weatherization staff and sub-contractors receive and review these documents and use them to guide the Weatherization work performed in client units by them."

Prior to issuing the PY **2025** DOE Grant Agreements, IHCDA ensure the above language is included to indicate that all work performed will meet or exceed Indiana's Weatherization Field Guide/SWS aligned document.

### **Tier 1 and Tier 2 Training:**

Indiana will continue to work with INCAA to provide the needed Tier 1 and Tier 2 training as required by [WPN 22-4](#). For Tier 1 training, INCAA continues to offer training for

- Quality Control Inspector
- Energy Auditor
- Retrofit Installer Shell
- Crew Leader.

For Tier 2 training, INCAA continues to offer the following, but are limited to the following training opportunities:

- Moisture Assessment
- Daily Safety Test Out
- Retrofit Installer Mechanical
- Lead Safe Work Practices
- Applying ASHRAE 62.2 – 2016
- Optimizing Weatherization Resources
- Program Management
- SWS
- Client Education
- CAZ Pressure Diagnostics
- NEAT/MHEA/MuTEA training
- Mechanical Systems for Auditors
- Electric Furnace and Heat Pump Inspections
- Vent Systems and Combustion Air Requirements
- Boiler Inspections
- Carbon Monoxide and Combustion Analysis
- Oil Furnace Training
- New Furnace Installation Inspections.

INCAA's class registration system is capable of placing students on a waiting list if a class is full at the time of registration. By utilizing the waiting list, INCAA, in cooperation with IHCDA, can monitor the need for classes and change the schedule as necessary. INCAA utilizes this information to populate the classes as they move forward through the grant cycle.

IHCDA recognizes that the primary focus for Tier 1 training during the 2025 Program Year to be on all Tier 1 training, including Quality Control Inspector, Energy Auditor, Retrofit Installer Shell and Crew Leader. IHCDA understands the importance of ensuring that the new information contained within [WPN 22-7](#) Health & Safety guidance, as well as Indiana's updated SWS-aligned Field Guide, is fully realized and understood by all sub-grantees and contractors within the Weatherization network. IHCDA will continue to support efforts to position Indiana's WX Network to test for the national Energy Auditor Certification. INCAA has incorporated all components of [WPN 22-7](#) into the Client Education course in addition to periodically offering a training course. Additionally, INCAA provides SWS training for

Weatherization Professionals. The Semi-Annual Technical Trainings, Competency Maintenance Refresher, Semi-Annual Managers meetings courses are designed to specifically include addressing updates or changes in DOE, IHCDA, SWS, Code, etc throughout each FY.

**See Section 11 Training of the 2025 IHCDA WAP Policy & Procedure Manual for further information on T&TA.**

