2026 WAP DOE Training & Technical Assistance Plan

1.0 – General Information
Comments that do not generally fit into the available tables below

See Policy & Procedure Manual for further information

- Section 6 Funding for T&TA budget category expenditure policies
- Section 12 Workforce for T&TA policies

The **2026 WAP DOE Training & Technical Assistance Plan** acts as the sole plan document on all WAP Training & Technical Assistance (T&TA) Programming, superseding all previous DOE and IIJA T&TA Plans.

IHCDA currently has 331 WAP Professionals:

- **Energy Auditor:** 80
- **Quality Control Inspector (QCI):** 46
- **Crew Leader:** 81
- **Retrofit Shell Installer:** 44
- **Retrofit Mechanical Installer:** 66
- **Mechanical Helper:** 14

Subrecipients may implement Workforce Development Initiatives (WDIs) following Section 12 of the Policy & Procedure Manual. IHCDA must approve a subrecipient's WDI before they can proceed.

2.0 – Overall T&TA Plan
Your overall T&TA Plan must incorporate suggestions and feedback from the following elements

Feedback from internal and external reviews, examples include:

- Feeback from Department of Energy (DOE) Project Officers (PO) monitoring visits
- Internal state audits
- Grantee monitoring of the sub-grantees
- Office of Inspector General (OIG) reports
- American Customer Satisfaction Index Feedback, and
- Other. Examples include:
  - Training feedback
  - Training retention activities

IHCDA incorporates the following suggestions and feedback from the following elements

- Feeback from Department of Energy (DOE) Project Officers (PO) monitoring visits
- Internal state audits
- IHCDA monitoring of the subrecipients
- American Customer Satisfaction Index Feedback
- Grant requirements
- Subrecipient training feedback
- Public comments during Public Hearing period
- Policy Advisory Council
- Benchmarking reports

Existing or planned accredited training center partnership or working relationship.

IHCDA currently contracts with Indiana Community Action Association (INCAA) to provide T&TA to the subrecipient network. Subrecipients may utilize INCAA or other IREC-accredited WAP Training Providers to gain certification.

Preparations for future/upcoming program requirements, examples include:

- **Updated Standard Work Specifications**
- **Migration to Online Weatherization Assistant**
- **Inclusion of Specific Language from Weatherization Program Notices**

Policy & Procedure Manual, Field Guide, and Program Guidances include language and directives from active WPNs and WAP Memoranda. Subrecipients receive trainings and updates on these documents, as well as updates to the WAP Database and Claims System.

The Energy Audit Tool was submitted to DOE on 6/12/2026, following an extension granted by DOE to submit after the original due date of 6/7/2026 due to updates to the JSON files both parties were unaware of. Edits to the Energy Audit Tool submission are being worked on per DOE's comments to submit before the expiration of approval on 12/7/2026.

What protocols are in place which ensure untrained staff are not left without supervisions during field operations?

See Policy & Procedure Manual

- Section 12 Workforce

Partnerships with the statewide home performance industry on training issues; if applicable.

N/A

How does analysis conducted, as detailed in Section V.6 of the Annual Application, influence the development of T&TA activities and priorities?

To assess subrecipient effectiveness, IHCDA uses a combination of monitoring and T&TA. Subrecipients with deficiencies may be required to attend training specific to the needs. Subrecipient deficiencies and subsequent training include but are not limited to:

- Lack of managerial oversight
- Inadequate technical, fiscal and database management
- Ineffective client education procedures

Reports are pulled weekly to review networkwide subrecipient unit production and expenditures. Monthly reviews monitor individual subrecipient production operations. Quarterly reviews monitor individual subrecipient production, administrative, and T&TA operations. IHCDA develops plans with subrecipients for reviews to the following scale.

1. Contact via email or phone with subrecipient to warn of concerning trend
2. One-time meeting with subrecipient to discuss areas of concern
3. Regular meetings with subrecipient to discuss deficiency and develop goals to fix
4. Placement of subrecipient on Corrective Action Plan

3.0 Workforce Credentials

Describe the following aspects of your T&TA Plan related to workforce credentials.

Federally Required Credentials. Examples Include:

- Environmental Protection Agency Lead Renovation, Repair, and Painting Program
- Home Energy Professional's Quality Control Inspector Certification

See Policy & Procedure Manual

- Section 12 Workforce

Grantee/State Required Credentials. Examples Include:

- Building Performance Institute Building Analyst
- Grantee-Developed Certifications

See Policy & Procedure Manual

- Section 12 Workforce

Subgrantee/Local Required Credentials. Examples Include:

- Contractor Licensing

See Policy & Procedure Manual

- Section 12 Workforce

Industry Required Credentials. Examples Include:

- Equipment/Material Manufacture Certification
- Vendor Certification

N/A

Process for Maintaining Workforce Credentials

See Policy & Procedure Manual

- Section 12 Workforce

How Credentials Are Tracked

See Policy & Procedure Manual

- Section 12 Workforce

4.0 – Training

Grantees have two options to describe their training

A) Use the embedded spreadsheet to identify and describe the training schedule for Grantee and Subgrantee staff. Include technical and non-technical training.
B) Use the fields below to identify and describe the training schedule for Grantee and Subgrantee staff. Include technical and non-technical training.

Grantee's are to include the following in their descriptions regardless of what option is being used to describe their training plan:

- Specify whether attendance is mandatory, and the ramifications for non-compliance.
- Specify if the T&TA Plan spans multiple Program Years (PY), indicate which trainings are intended in the current PY and which are planned for future PYs.

*The embedded spreadsheet, if completed at the end of the year to record delivered training, can be used as documentation for the required annual T&TA Report. Double click to open spreadsheet. Enter information and close. It will automatically save your information.

Programmatic/Administration Training

- Financial (I.E., 2 CFR 200)
- Management (I.E., 10 CFR 440)

Hutson Homes and SKJO provide additional T&TA for subrecipients working below the current contract requirements and struggling to meet production goals. Training will evaluate and create processes in collaboration with the subrecipients to improve the following:

- Costs & Budgets
    - Tracking unit expenses
    - The process of approving expense sheets per unit for finance
    - Reporting unit cost in the WAP Database
    - 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
- Production
    - Tracking units in production
    - Managing units in production
    - WAP Database reporting
    - Moving production forward
    - Evaluate monthly goals adding to production as needed
    - Writing a process for completing a unit from Energy Audit to QC Inspection
- 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

Comprehensive Technical Training aligned to the Job Task Analysis (identify at what intervals workers will receive regular, comprehensive training as required by Weatherization Program Notice (WPN) 22-4)

- Quality Control Inspector
- Energy Auditor
- Crew Lead
- Retrofit Installer/Technician

INCAA covers all four DOE Job Task Analyses (Energy Auditor, Crew Leader, Retrofit Shell Installer, and Quality Control Inspector). INCAA received their 5 year re-accreditation on May 29, 2024. INCAA has adopted and utilizes the NREL Installer Badges Toolkit as common practice as well.

The table below this section details out trainings in order of if they are mandatory, elective, or positional. Positional trainings become mandatory if it is for the specific position. For example, QC Inspection and Program Management trainings are positional trainings required for QCIs and WAP Managers, but not required for an Energy Auditor.

IHCDA will continue to work with WAP Training Providers to provide the needed Tier 1 and Tier 2 training as required by WPN 22-4.

Tier 1 Training
Whole house trainings aligned with the Job Task Analyses:

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

Tier 2 Training
Individual subject matter trainings:

- Moisture Assessment
- Daily Safety Test Out
- Retrofit Mechanical Installer
- Lead Safe Work Practices
- Applying ASHRAE 62.2 – 2016
- Optimizing Weatherization Resources
- Program Management
- SWS
- Client Education
- CAZ Pressure Diagnostics
- Energy Audit software 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

Specific Technical Training

- Topics identified during monitoring visit(s)
- Energy Modeling

- Health & Safety. All H&S topics in WPN 22-7 require some level of training for all affected workers, the frequency of this training is a Grantee decision. Examples include:
    - Air Conditioning and Heating Systems
    - Asbestos
    - Biologicals and Unsanitary Conditions
    - Building Structure and Roofing
    - Code Compliance
    - Combustion Gases
    - Electrical
    - Formaldehyde, Volatile Organic Compounds (VOCs), Flammable liquids, and other Air Pollutants
    - Fuel Leaks
    - Gas Range/Ovens
    - Hazardous Materials Disposal
    - Injury Prevention of Occupants and Weatherization Workers
    - Lead Base Paint
    - EPA's Lead Renovation, Repair & Painting Program (RRP)
    - Mold/Moisture
    - Pests
    - Radon
    - Safety Devices
    - Ventilation and Indoor Air Quality
        - American Society of Heating Refrigeration and Air-Conditioning Engineers
    - Window Repair, Door Repair
    - Worker Safety
        - OSHA
    - Additional topics as described in Health & Safety Plan
- Client Education (training workers to conduct client education). Examples include:
    - Energy Savings strategies
    - Program-specific information. Examples include:
        - What to expect
        - Additional resources
    - Health & Safety issues

Air Conditioning and Heating Systems
Licensing and/or certification for Retrofit Mechanical Installers as required by AHJ. CAZ depressurization test and inspection training.

Asbestos
Recognize suspected Asbestos Containing Material (ACM). AHERA or other appropriate asbestos control professional certification/training is required to abate the ACM.

Biologicals and Unsanitary Conditions
Recognize and work safely around biological and unsanitary conditions and when those conditions are cause for deferral or denial.

Building Structure and Roofing
Identify structural and roofing issues

Code Compliance
Determine what code compliance may be required

Combustion Gases
Perform appropriate testing, determine when a unit is excessively depressurized, and the difference between air free and as-measured CO. Determination of CO action levels.

Electrical
Train how to identify electrical hazards. Instructed to avoid insulating over or dense packing around live knob and tube wiring while installing insulation in attics, floors, or walls. Instructed to always follow local (or AHJ) code whenever necessary.

Fuel Leaks
Fuel leak testing and safety protocols

Hazardous Materials Disposal
Appropriate Personal Protective Equipment (PPE) for working with hazardous waste materials. Disposal requirements and locations. Health and environmental risks related to hazardous materials.

Injury Prevention of Occupants and WAP Professionals
Based around OSHA 10 requirements

Lead Base Paint
Based around EPA RRP certification requirements

Mold/Moisture
Identify the conditions that promote mold growth, treatment options for less extensive mold conditions and best practices to prevent mold growth. Health aspects related to mold and moisture issues for both WAP Professionals and clients. When to safely proceed with weatherization work or when to defer or deny the unit until serious conditions have been remediated.

Pests
Assess the presence and degree of infestation, associated risks, and need for deferral or denial.

Radon
Knowledge of radon, what it is and how it occurs, including what factors may make radon worse, and precautionary measures

Ventilation and Indoor Air Quality
Where to install smoke and carbon monoxide alarms.

Worker Safety
All subrecipients are required to have a written Injury and Illness Prevention Program.

Training Provider
Subrecipients may train at a WAP Training Provider location or have on-site T&TA provided by staff directly upon request. At the beginning of each DOE/IIJA Program Year, subrecipients are required to submit a list of all WAP Professionals to IHCDA Program Monitors.

Semi-Annual Managers Meeting (SAMM) & Administrative Meetings
SAMMs are held twice per year and administrative meetings are held when deemed necessary. It is required for subrecipient WAP Managers to attend all SAMMs and administrative meetings provided by IHCDA. It is recommended that Financial staff and other WAP staff also attend. If a WAP Manager is unavailable to attend, a member of their organization must attend in their place. An online option will be offered to those who not able to attend in person

Quarterly Technical Training (QTT)
Each subrecipient is required to send at least one technical representative for their WAP Professionals to all Quarterly Technical Trainings (QTT). Violating this requirement will reviewed in monitoring and brought up to the WAP Manager and Executive Director.

Conferences. Examples Include

- **Energy Out West**

• **Building Performance Association** • **National Association for State and Community Service Providers** • **Community Action Partnership**
IHCDA sets aside funding resources to DOE approved conferences, including the following: • Energy Out West • NASCSP Winter Conference • NASCSP Fall Conference • HPC Conference • INCAA Conference • State Association Conference IHCDA also participates in Bimonthly NASCSP Region 4 meetings held online. Subrecipients may attend separate WAP-aligned conferences, so long as they have a direct benefit to WAP.
Other, please specify:

See the WAP T&TA Schedule for trainings detailed in Section 4. These trainings are revised annually and provided to the network at least once through the standard Program Year (July 1 – June 30).

5.0 – Technical Assistance Describe the technical assistance activities included in the T&TA budget category
Programmatic/Administration Support
IHCDA is available for support on a daily basis for the subrecipient network through phone, email, or online meetings. More serious needs may warrant an on-site visit from IHCDA or WAP Training Provider staff. IHCDA will host network-wide administrative meetings to address specific network issues, knowledge gaps, and emergent issues on an as needed basis. IHCDA will specifically provide individual meetings for subrecipients struggling to meet spending and production goals, as well as regular meetings for those on more serious corrective action plans.
Technical Support
Reflects the same schedule and plan as Programmatic Support.
Health & Safety Support Activities
Reflects the same schedule and plan as Programmatic and Technical Support. Specific activities described in the Health & Safety Plan.
Monitoring What percentage of T&TA funding is allocated to monitoring? (If defined in Section B of the Budget details within the annual application, include that within your description below).
15% of T&TA funding is allocated to monitoring.
Other, please specify
N/A

6.0 Client Education Describe what current and planned client education materials and/or activities are included in the T&TA budget category. Only those paid for with T&TA funds need to be mentioned. Note: This does not include training workers to deliver client education. This should be described in the Training section above.
Client education activities prior to, during, and after weatherization which address the weatherization process and energy savings details
See WPolicy & Procedure Manual • Section 4.1 Weatherization Activities – Client Education
Client education activities regarding H&S issues as indicated in WPN 22-7 • Air Conditioning and Heating Systems • Asbestos

• Biologicals and Unsanitary Conditions
• Building Structure and Roofing
• Code Compliance
• Combustion Gases
• Electrical
• Formaldehyde, Volatile Organic Compounds (VOCs), Flammable Liquids, and other Air Pollutants
• Fuel Leaks
• Gas Range/Ovens
• Hazardous Materials Disposal
• Injury Prevention of Occupants and Weatherization Workers
• Lead Base Paint
• EPA's Lead Renovation, Repair & Painting Program (RRP)
• Mold/Moisture
• Pests
• Radon
• Safety Devices
• Ventilation and Indoor Air Quality
  • American Society of Heating Refrigeration and Air-Conditioning Engineers
• Window Repair, Door Repair
• Worker Safety
  • OSHA
• Additional topics as described in Health & Safety Plan

See WAP Health & Safety Plan