2026 WAP DOE Training & Technical Assistance Plan

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1.0 – General Information Comments that do not generally fit into the available tables below
See 2026 IHCDA WAP Policy & Procedure Manual for further information • Section 6 Funding for T&TA budget category expenditure policies The **2026 WAP DOE Training & Technical Assistance Plan** acts as the sole plan document on all WAP T&TA Programming, superseding all previous DOE and IIJA T&TA Plans. IHCDA currently has 331 Home Energy Professionals: • **Quality Control Inspector:** • **Energy Auditor:** • **Crew Leader:** • **Retrofit Shell Installer:** • **Retrofit Mechanical Installer:** • **Mechanical Helper:** Subrecipients must for track all staff and/or contractor certifications with the following information: • Individual name • Hire date • Certifications held • Expiration date of certifications • Record of Continuous Education Units (CEUs) • Attendance at Competency Maintenance Refresher (CMR) IHCDA utilizes monitoring to keep track of network workforce numbers and WAP Professional certifications necessary to perform Weatherization. Additional T&TA funding is available to subrecipients for recruitment efforts, onboarding, and training of staff and contractors.

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

Feedback form 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 • Grantee 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**

The SWS-Aligned Field Guide was submitted to DOE on February 4, 2026. The Field Guide, Policy Manuals, and Program Guidances include language and directives from active WPNs and WAP Memoranda. Subrecipients receive trainings and updates on the these documents, as well as updates to the WAP Database and Claims System.

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

Subrecipients will have 12 months to train, test, and attain their designated certifications and obtain the required trainings unless a waiver is provided by IHCDA. Untrained staff must never enter units without supervision of a certified WAP Professional. Retrofit Mechanical Helpers are must never enter a unit without the Retrofit Mechanical Installer. A crew leader is required to be present at the unit at all times during weatherization work.

Subrecipients 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. If IHCDA finds a person who is working or has worked on a weatherization unit without required certifications, the following steps may be taken:

- Issue a written finding with a timeline for resolution of the non-compliance issues.
- Require re-works or re-inspections at the subrecipient/contractor expense.
- Require repayment of all funds claimed for the affected weatherization work.
- Hold the subrecipients Wx financial claims until all issues are properly addressed.
- Temporarily suspend the noncompliant person from performing work in Indiana's Weatherization Assistance Program.

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
IHCDA follows DOE guidelines, informed by EPA's Lead Renovation, Repair, and Painting Program (RRP). Subrecipients and contracts must follow RRP when working in pre-1978 units, unless testing confirms work area to be lead free. All subrecipient and contractor staff must receive training to install measures in a lead-safe manner in accordance with the EPA and WPN 22-7 protocols to work in pre-1978 units.
Grantee/State Required Credentials. Examples Include: • Building Performance Institute Building Analyst • Grantee-Developed Certifications
WAP Professionals may be certified by any IREC-accredited WAP Training Provider. IHCDA recognizes the following credentials attained through certification: • Energy Auditor • Quality Control Inspector • Retrofit Installer Shell • Retrofit Installer Mechanical • Crew Leader Shell • Healthy Home Evaluator WAP Professionals with a qualifying license must pass an initial test out for Retrofit Mechanical Installer if they do not wish to go the path of certification. If the test results in a failure, certification is required. Onsite T&TA will be provided to Retrofit Mechanical Installers who pass license test out and do not have certification. IHCDA will fund the first certification testing. Subrecipients must receive IHCDA approval to receive additional funds to support further in the event the first test is a failure. IHCDA in conjunction with INCAA has developed and established the Indiana Skills Verification (ISV). INCAA acts as the IREC-accredited WAP Training Provider and is the sole source of certification and policy surrounding ISV, including credentials, training pathways, and CEU requirements.
Subgrantee/Local Required Credentials. Examples Include: • Contractor Licensing
Specialty contractors who complete work units which results in changes to exhaust systems, ventilation systems or the tightening of the unit are required to complete a Daily Safety Test Out (DSTO) training from a WAP Training Provider and are required to complete a DSTO form upon the day of the install. A representative from the subrecipient may also complete the DSTO at the end of each specialty contractor workday when applicable. IHCDA recommends all specialty contractors be placed under a contract with subrecipients before starting work.
Industry Required Credentials. Examples Include: • Equipment/Material Manufacture Certification • Vendor Certification
N/A
Process for Maintaining Workforce Credentials
All professionals must be certified by a WAP Training Provider that mandates at least 8 CEUs annually for recertification. Record of CEUs must be tracked by the subrecipient for all weatherization staff, crews, and contractors. Subrecipients must track the training connected to the claimed CEUs for review at time of monitoring. This tracking must include documentation verifying completion of the training, who performed the training and the topic of training.
How Credentials Are Tracked
IHCDA will verify training records and qualifications of all WAP Professionals annually. Subrecipients must be prepared to provide training documentation whenever it is requested by IHCDA. Training

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records must contain clear documentation and verification that the required and appropriate training was attended and completed. It is the responsibility of the subrecipient to identify within the client file each individual who entered the unit.

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 subgrantees to improve the following:

- Costs & 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
- 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
- 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, Quality Control Inspector, Crew Leader and Retrofit Installer Shell). INCAA received their 5 year re-accreditation on May 29, 2024. INCAA has adopted and utilizes the NREL installer badge 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, QCI and Program Management trainings are positional trainings required for QCIs and Program Managers, but not required for an Energy Auditor.

Indiana will continue to work with WAP Statewide 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:

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

Tier 2 Training
Individual subject matter trainings:

- 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
- 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

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- 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 HVAC 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 building 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

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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 Weatherization Workers
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 workers and clients. When to safely proceed with weatherization work or when to decline the home until serious conditions have been eliminated.

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

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 sub-grantees are required to have a written Injury and Illness Prevention Program.

Training Provider
Subrecipients may train at the WAP Training Provider location or have on-site T&TA provided by staff directly upon request. At the beginning of each DOE program year, subrecipients are required to submit a list of all in-house and contractor Weatherization 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 Weatherization Program Managers to attend all SAMMs and administrative meetings provided by IHCDA. It is recommended that Financial staff and other Weatherization Program staff also attend. If a Wx 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 field staff/contractors to all Quarterly Technical Trainings (QTT). Violating this requirement will reviewed in monitoring and brought up to the Weatherization 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
- State Association Conference

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IHCDA also participates in Bimonthly NASCSP Region 4 meetings held online.
Other, please specify:

The below schedule details the specific trainings as detailed in Section 4. These trainings are revised annually and provided to the network at least once through the Program Year (July 1 – June 30).

Training Topic	Training Category	Training Type	Requirement Type	Training Provider
Quality Control Inspector	Technical	Specific	Elective, Positional	INCAA
Energy Auditor	Technical	Specific	Elective, Positional	INCAA
Retrofit Installer Shell	Technical	Specific	Elective, Positional	INCAA
Crew Leader	Technical	Specific	Elective, Positional	INCAA
Moisture Assessment	Technical	Specific	Mandatory	INCAA
Daily Safety Test Out	Technical	Specific	Elective, Positional	INCAA
Retrofit Installer Mechanical	Technical	Specific	Elective, Positional	INCAA
Introduction to Weatherization	Technical	Comprehensive	Mandatory	INCAA
OSHA 10	Technical	Specific	Mandatory	INCAA
Lead Safe Work Practices	Technical	Specific	Mandatory	INCAA
Applying ASHRAE 62.2 – 2016	Technical	Specific	Mandatory	INCAA
Optimizing Weatherization Resources	Technical	Specific	Mandatory	INCAA
Program Management	Technical	Specific	Elective, Positional	INCAA
SWS	Technical	Specific	Mandatory	INCAA
Client Education	Technical	Specific	Mandatory	INCAA
CAZ Pressure Diagnostics	Technical	Specific	Mandatory	INCAA
NEAT/MHEA/MulTEA training	Technical	Specific	Elective	INCAA
Mechanical Systems for Auditors	Technical	Specific	Elective	INCAA
Electric Furnace and Heat Pump Inspections	Technical	Specific	Elective	INCAA
Vent Systems and Combustion Air Requirements	Technical	Specific	Mandatory	INCAA
Boiler Inspections	Technical	Specific	Elective	INCAA
Carbon Monoxide and Combustion Analysis	Technical	Specific	Mandatory	INCAA
Oil Furnace Training	Technical	Specific	Mandatory	INCAA
New Furnace Installation Inspections	Technical	Specific	Elective	INCAA

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Costs & Budgets	Programmatic	Specific	Elective	Hutson Homes
Production	Programmatic	Specific	Elective	Hutson Homes
Compliance	Programmatic	Specific	Elective	Hutson Homes

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 sub-grantees 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).
22% of T&TA funding is allocated to monitoring.
Other, please specify

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
Subrecipients provide the occupants with the information and tools they need to protect the weatherization materials installed and actively participate in saving energy in their units. Providing client education is mandatory. The client education must include but is not limited to the education required in WPN 22-7 and the Health & Safety Plan. Additionally, education about energy use and energy conservation must be shared with each household throughout the weatherization process. Materials can be found at Intelligent Weatherization, NASCSP, and EPA.
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

Specific conditions described in the Client Education sections of the Health & Safety Plan

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