

# North Carolina Weatherization Assistance Program Training and Technical Assistance (T&TA) Plan



United States Department of Energy

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NC Department of Environmental Quality,  
State Energy Office

## **Purpose**

Workforce development is one of the nationwide program priorities of the U.S. Department of Energy (DOE) Weatherization Assistance Program (WAP). The WAP seeks to grow a highly skilled, diverse, and well-trained workforce to meet the increased demand for energy efficiency retrofits in low-income households.

The purpose of the North Carolina (NC) Weatherization Assistance Program (WAP) Training and Technical Assistance (T&TA) Plan is to establish expectations for training requirements for the NC weatherization workforce to deliver high-quality weatherization services according to standard specifications, and to provide training guidance and resources. It also provides guidance on availability and usage of T&TA funds. This is in alignment with and part of the U.S. Department of Energy (DOE) WAP Quality Work Plan, as described in Weatherization Program Notice (WPN) 22-4, to support and verify quality work, and as required by 10 CFR 440.12(b)(7).

## **The Weatherization Process and Rules**

*Program Managers* and *Weatherization Administration staff* conduct outreach to find potential clients. After a household applies, Weatherization Administration staff verify income and eligibility. Within 30 days, the Subgrantee must send a written approval or denial. Eligible clients are placed on a waiting list based on a priority score, with higher scores served first. Ineligible applicants must receive the reason for denial and information on how to appeal the decision.

After a client is approved, an energy audit is scheduled. The *Energy Auditor* evaluates the home and interviews the client to understand:

- How the client uses the home
- Daily routines and lifestyle patterns
- Comfort and energy concerns.

The Energy Auditor also completes health and safety checks on combustion appliances, when applicable. They assess the home's thermal envelope (the "shell"), run a blower door test to measure the building's air leakage rate, and use an infrared scan to identify missing or uneven wall insulation. They then inspect the attic to confirm insulation levels and locate major air leakage areas.

If the home needs repairs that fall outside the weatherization scope, the program defers the home until the owner corrects the issues or another program can address them.

A licensed HVAC subcontractor evaluates, cleans, and tunes the primary heating/cooling system in the home. If a repair or replacement is needed and the client is eligible, the Heating and Air Repair and Replacement Program is used to address the issue.

For standard homes, data collected onsite (building sq. ft., air leakage rate, insulation levels, etc.) along with estimated costs are used in conjunction with the computerized energy audit or Priority List of Measures to develop a detailed work order that will save the maximum amount of energy for any given investment. Work orders generated specify health and safety work, heating and distribution system efficiency improvements, and air sealing and insulation work. The shell work is completed by either agency-staffed crews or agency-hired subcontractors. A work order is given to the *Crew Leader and/or Subcontractor*, and trained *Retrofit Installers* are dispatched to the home to install energy efficiency measures.

Upon completion of all work, a *Quality Control Inspector* performs a final inspection using the initial energy audit, work orders, and all invoices submitted. This inspection is done to ensure workmanship of the highest quality and to ensure the program is charged for work that was completed. The client and the inspector sign off that the work has been done.

Once the home is inspected, the invoices are paid, and the job is closed. The *Weatherization Program Manager* routinely monitors local staff and subcontractor work to ensure proper administrative oversight.

### **Training Needs Assessment**

Given the technical complexity and ongoing updates to the NC WAP, T&TA are high priority. New Subgrantee staff receive introductory training annually, supplemented by courses provided in response to Subgrantee needs, and DOE or NCDEQ mandates.

Training needs are determined through a combination of assessments and NC WAP monitoring. When monitoring identifies deficiencies, NC WAP may require specific training to be completed as part of corrective action.

### **Availability and Use of Training and Technical Assistance Funds**

#### DOE Annual Formula WAP

Annual WAP subgrantees receive a portion of their annual budget for T&TA to maintain a qualified workforce capable of providing the highest quality of weatherization services. Subgrantees must follow the policies and procedures for allowable costs outlined in the annual [North Carolina Weatherization Assistance Plan](#), as well as the Weatherization Billing Allowable guidance distributed by NC WAP.

Training courses to support program delivery through the NC WAP's preferred training provider are available to all NC WAP weatherization agencies *free of registration costs through March 2027*. Weatherization agencies are encouraged to take advantage of such offerings through the NC WAP preferred training provider, Everblue, through March 2027. WAP agencies are still responsible for costs related to traveling to the training location (in the case of in-person trainings), including lodging, meals, and transportation.

WAP agencies have the flexibility to choose other providers, with the added registration costs however, as well as choosing to attend conferences or workshops. Annual WAP subgrantees may enroll in courses through Everblue beyond March 2027, but they will need to use their T&TA funds to pay for training registration costs.

#### DOE Infrastructure Investment and Jobs Act (IIJA) WAP

IIJA subgrantees must follow the policies and procedures for allowable costs outlined in [North Carolina IIJA Weatherization Assistance Plan](#). Unlike the annual WAP, IIJA weatherization agencies do not have T&TA funds.

Training courses to support IIJA program delivery are available to all NC weatherization agencies *free of registration costs through the NC WAP's preferred training provider through March 2027*.

Weatherization agencies are encouraged to take advantage of such offerings through the NC WAP preferred training provider through March 2027. WAP agencies are still responsible for costs related to traveling to the training location (in the case of in-person trainings), including lodging, meals, and

transportation.

WAP agencies have the flexibility to choose other providers, with the added registration costs, as well as choosing to attend conferences or workshops. IJJA WAP subgrantees may enroll in courses through Everblue beyond March 2027, but they will need to use their Administration funds to pay for training registration costs.

### **T&TA for Subcontractors**

Subgrantees may pay for training-related expenditures for *NC WAP-approved subcontractors*, specifically relating to lodging, meals, and transportation for subcontractors to attend weatherization training through Everblue, at no registration costs (through March 28 2027). Training expenses are only allowable for subcontractors that have a fully executed Subcontractor Agreement with Subgrantees. Courses that are required for subcontractors to renew/maintain trade licenses are not allowable.

Subgrantees unsure if a particular training for a subcontractor is allowable should contact the NC WAP before funds are committed. Annual WAP Subgrantees are required to use state per diem rates based on the provisions of the *“North Carolina Weatherization Assistance Plan.”* IJJA WAP Subgrantees are required to use the state per-diem rates based on the provisions of the *“North Carolina IJJA Weatherization Assistance Plan.”*

Subcontractors must submit an invoice for the training indicating the persons in attendance, certificates of successful completion (if applicable), dates of travel, departure and arrival times, and daily breakdown of expenses. Subcontractors cannot receive per diem for meals that are already included in the cost of training. All expenses must be supported by receipts, except for meal per diem.

### **Training Pathways, Required and Recommended Courses**

The following training pathways have been established through the NC WAP preferred weatherization training provider, Everblue, to provide a structured and guided route for learners in the weatherization network to gain specific skills related to their job title or career pathway. This sequence of courses ensures that individuals build a solid foundation before moving on to a more advanced career level or pathway.

Pathway Name	Required Courses	OJT	BPI Building Science Principles (BSP)	Weatherization 101	Weatherization Finance	Customer Service	Introduction to ASHRAE 62.2	Introduction to Heat Pump	Asbestos Awareness	EPA RRP Lead Safe Renovator – Initial	OSHA 10	Retrofit Installer Technician (Shell / Mechanical focus)	BPI Infiltration and Duct Leakage (IDL)	BPI Building Analyst Technician (BA-T)	Crew Leader II: Leadership and Conflict Resolution (Crew Leader Skills Training)	BPI Building Analyst Professional (BA-P)	HEP Energy Auditor (EA)	Weatherization Assistant v10 (WAweb)	HEP Quality Control Inspector (QCI)
	Pathway Total / Individual Total (hours). Includes OJT	30	16	4	4	4	2	1	2	8	10	40	10	24	4	10	48	24	24
<b>Weatherization Administration</b>																			
Weatherization Administration	29	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weatherization Program Management	52	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Weatherization Field</b>																			
Retrofit Installer Technician	114	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crew Leader	152	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Energy Auditor	237	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Quality Control Inspector (QCI)	261	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

In order to deliver the highest quality weatherization service in accordance with standard work specifications, it is a focus of the NC WAP to upskill the weatherization workforce by leveraging available IJJA funds. *The goal is for subgrantee and subcontractor staff in the various weatherization roles listed above to have completed all required courses and passed associated exams, and to maintain or improve their qualifications over time through continuing education and professional development. The NC WAP is offering a window of time through March 2027, for Subgrantee and subcontractor staff to complete the required courses above.* Time extensions may be requested on a case by case basis. Staff without the required coursework and exams completed by then will not be authorized to charge their labor to WAP until properly credentialed. NC WAP will consider relevant, documented weatherization and energy efficiency experience when evaluating training and certification requirements for staff and crew who have not yet completed all required credentials. This approach ensures that experienced workers are appropriately recognized for prior field experience, technical knowledge, and demonstrated competencies. Staff with qualifying experience may be eligible for modified training pathways, competency assessments, challenge exams, or accelerated certification timelines, as allowed under program guidelines and applicable funding requirements. All determinations will be documented and maintained in accordance with program monitoring, quality assurance, and compliance standards. See table below for more information.

<b>Weatherization Administration</b>	
<b>3+ Years Experience</b>	<b>Classes Waived</b>
	Weatherization 101
	Introduction to Heat Pumps

<b>Weatherization Field</b>	
<b>3+ Years Experience</b>	<b>Classes Waived</b>
	Weatherization 101
	Introduction to ASHRAE 62.2
	Introduction to Heat Pumps
	Asbestos Awareness
	Retrofit Installer Technician

\*Industry Certifications (BPI, LEAD, and OSHA) cannot be waived

Everblue continuously collaborates with subgrantees to identify evolving training needs and share training calendars. Some of the courses in the career pathways above, as well as additional offerings, are available through other North Carolina training providers. WAP agencies may elect to use alternative providers; however, doing so may result in additional registration costs. Everblue’s training is delivered online and at multiple locations throughout North Carolina to reduce travel requirements and minimize administrative and financial burden for subgrantees and subcontractors.

### **Course Offerings and Registration**

The most up-to-date information from Everblue related to course schedules, training locations, and registration, can be found at <https://everbluetraining.com/get/north-carolina-weatherization->

[training/](#). Course descriptions for each class can be found at the end of this document.

**Pre-Apprenticeship**

Individuals aspiring to work in the NC WAP should consider starting in the Energy Efficiency Pre-Apprenticeship program. This hands-on training opportunity will provide the education and on-the-job training necessary to become a home energy efficiency professional.

The Energy Efficiency Pre-Apprenticeship provides the opportunity to earn skills such as:

- inspect appliances inside and outside of the home;
- perform tests to check how well appliances work;
- identify opportunities to improve energy efficiency;
- suggest appliance upgrades;
- physically install replacements and improvements; and
- help families save money on their energy bills.

While there are no prerequisites to join this program, NC WAP requires interested individuals to complete an application and interview process to gauge interest and commitment into the program. More information can be found at <https://nc.apprenticeship.everbluetraining.com/>.

Participants should expect to attend training for 4 weeks. Training is a combination of online training, face-to-face instruction, and hands-on training at one of North Carolina’s weatherization training centers.

**Weatherization Administration**

Weatherization administration staff support program staff by providing foundational knowledge of building science, weatherization program operations, customer engagement, finance, and required program systems. This pathway strengthens agency capacity by ensuring administrative personnel understand field processes, compliance requirements, and reporting expectations.

Below is a list of the required and recommended training for this role.

Courses and Exams	Format	Duration
Required		
1) BPI Building Science Principles Training and Exam	Webinar	16 hours
2) Weatherization 101	Webinar	4 hours
3) Weatherization Finance	Webinar	4 hours
4) Customer Service	Webinar	4 hours
5) Introduction to Heat Pumps	Blended	1 hour
Recommended (optional)		
N/A		

**Weatherization Program Management**

The Weatherization Program Management pathway is for individuals working in a management role within an agency (subgrantee), or subcontractor. These individuals are responsible for overseeing WAP operations, coordination, finance, and compliance. This pathway focuses on program-level understanding, full staff oversight, and alignment with reporting, performance, and monitoring requirements.

Below is a list of the required and recommended training for this role.

Courses and Exams	Format	Duration
Required		
1) BPI Building Science Principles Training and Exam	Webinar	16 hours
2) Weatherization 101	Webinar	4 hours
3) Weatherization Finance	Webinar	4 hours
4) Customer Service	Webinar	4 hours
5) Weatherization Assistant v10 (WAweb) Training	Webinar	24 hours
Recommended (optional)		
Introduction to ASHRAE 62.2	Webinar	2 hours

### Retrofit Installer Technician

The Retrofit Installer Technician (also known as crew member, housing technician, and carpenter) is an entry level position that is primarily responsible for installing energy efficiency measures (air sealing, duct sealing, insulation installation, etc.). This pathway develops field staff competency in the installation of weatherization and energy efficiency measures through a combination of classroom instruction, hands-on training, and on the job training (OJT). Emphasis is placed on safety, building science principles, and proper installation techniques to ensure quality and consistency. This position is part of subgrantee staff and/or subcontractor staff. A full summary of the Retrofit Installer Technician Job Task Analysis (JTA) can be found at <https://docs.nrel.gov/docs/fy12osti/51671.pdf>.

Below is a list of the required and recommended training for this role. In some cases, OJT is required before a formal class. OJT must be documented in the On the Job Training Form found at the end of this plan. OJT can be offered by the subgrantee.

Courses and Exams	Format	Duration
Required		
On the Job Training	In Person	30 hours
1) BPI Building Science Principles Training and Exam	Webinar	16 hours
2) Weatherization 101	Webinar	4 hours

3) Customer Service	Webinar	4 hours
4) Asbestos Awareness Training and Exam	Webinar	2 hours
5) EPA RRP Lead Safe Renovator (Initial) Training and Exam	Blended	8 hours
6) OSHA 10 Training and Exam	On Demand	10 hours
7) Retrofit Installer Technician (Shell / Mechanical focus) Training	Blended	50 hours
Recommended (optional)		
Introduction to ASHRAE 62.2	Webinar	2 hours
BPI Infiltration & Duct Leakage (IDL)	Blended	10 hours
Weatherization Installer Badges	On Demand	Varies

### Crew Leader

The Crew Leader (also known as foreman) is the job that is primarily responsible for supervising and assisting in the retrofitting activities. Crew Leaders are trained to oversee installations, manage crews, and ensure work meets program standards and specifications. The Crew Leader is responsible for quality control, testing procedures, documentation, and conducting a final walk-through to ensure that all work is completed in a satisfactory manner. This pathway prepares experienced field staff to lead weatherization crews by integrating advanced training with leadership, supervision, and safety management. This position is part of subgrantee staff and/or subcontractor staff. A full summary of the JTA can be found at: <https://docs.nrel.gov/docs/fy19osti/73578.pdf>.

Below is a list of the required and recommended training for this role. In some cases, OJT is required before a formal class. OJT must be documented in the On the Job Training Form. OJT can be offered by the Grantee or the Subgrantee.

Courses and Exams	Format	Duration
Required		
On the Job Training	In Person	30 hours
1) All Training Required Under Retrofit Installer Technician		124 hours
2) BPI Infiltration & Duct Leakage (IDL) Training and Exam	Blended	10 hours
3) BPI Building Analyst Technician (BA-T) Training and Exam	Blended	24 hours
4) Crew Leader II: Leadership and Conflict Resolution (Crew Leader Skills Training)	Webinar	4 hours
Recommended (optional)		
Introduction to ASHRAE 62.2	Webinar	2 hours

## Energy Auditor and Quality Control Inspector Certifications

The DOE Guidelines for Home Energy Professionals (HEP) project helps establish a national residential energy upgrade industry and a skilled and credentialed workforce. The project creates standard work specifications, advanced professional certifications for workers, and accredited training programs.

The Building Performance Institute (BPI) approves HEP Energy Auditor (EA) and Quality Inspector (QCI) candidates, issues HEP certifications, and tracks HEP continuing education. BPI requires candidates to apply for HEP certifications. This application documents a candidate's education, training, and work experience and must be approved by BPI before a candidate can take a HEP examination. The application should be submitted at least 60 days before a candidate would like to take an exam. Candidates cannot take an exam for the same HEP classification more than 3 times in a 12-month period. Applications and prerequisite criteria can be found at <https://www.bpi.org/certified-professionals/energy-auditor/>.

Subgrantees must ensure that staff in positions requiring certification meet the applicable requirements by the deadlines established in this Training Plan. If an individual is not certified by the within six months of hire, NC WAP will review the circumstances and, in coordination with the subgrantee, determine appropriate next steps on a case-by-case basis. Options may include allowing the individual to continue in the role while completing certification within an agreed-upon timeframe or reassigning the individual to duties that do not require certification until certification is obtained.

### Energy Auditor (EA)

The Energy Auditor (also known as auditor) is the job that is primarily responsible for evaluating the health and safety issues, durability, comfort, and energy use of a residential building. The Energy Auditor conducts advanced diagnostic tests, gathers and analyzes data, and creates energy models to draw conclusions and make recommendations to the client for improvements. This pathway emphasizes diagnostic testing, data collection, health and safety, and preparation for nationally recognized auditor certifications. This position is typically found at the subgrantee level but may be subcontracted out. A full summary of the JTA can be found at: <https://www.nrel.gov/docs/fy23osti/85300.pdf>.

Below is a list of the required and recommended training for this role. In some cases, OJT is required before a formal class. OJT must be documented in the On the Job Training Form. OJT can be offered by the Grantee or the Subgrantee.

Courses and Exams	Format	Duration
Required		
On the Job Training	In Person	30 hours
1) All Training Required Under Crew Leader		162 hours
2) Introduction to ASHRAE 62.2	Webinar	2 hours
3) Introduction to Heat Pumps	Webinar	1 hour

4) HEP Energy Auditor (EA)	Blended	48 hours
5) BPI Building Analyst Professional (BA-P) Training and Exam	On Demand	10 hours
6) Weatherization Assistant v10 (WAweb) Training	Webinar	24 hours
Recommended (optional)		
Multifamily Building Analyst Training and Exam	On Demand	12 hours

### Quality Control Inspector (QCI)

The Quality Control Inspector (also known as final inspector) is the job that is primarily responsible for ensuring the completion, appropriateness, and quality of energy upgrade work by conducting a methodical inspection of the building and performing safety and diagnostic tests. QCIs ensure compliance with DOE and NC WAP standards, support continuous improvement, and protect program integrity through rigorous quality assurance practices. This pathway provides advanced training for experienced professionals responsible for independent inspection and verification of completed weatherization work. This position is typically found at the subgrantee level but may be subcontracted out. A full summary of the JTA can be found at <https://www.nrel.gov/docs/fy23osti/85789.pdf>.

Below is a list of the required and recommended training for this role. In some cases, OJT is required before a formal class. OJT must be documented in the On the Job Training Form. OJT can be offered by the Grantee or the Subgrantee.

Courses and Exams	Format	Duration
Required		
On the Job Training	In Person	30 hours
All Required Training Under Energy Auditor		247 hours
1) HEP Quality Control Inspector (QCI) Training and Exam	Webinar	24 hours
Recommended (optional)		
N/A		

### Multifamily Building Analyst

The Multifamily Building Analyst (also known as multifamily auditor) is the job that is primarily responsible for evaluating the health and safety issues, durability, comfort, and energy use of a multifamily residential buildings. The Multifamily Building Analyst conducts advanced diagnostic tests, gathers and analyzes data, and creates energy models to draw conclusions and make recommendations to the client for improvements. This position is typically found at the subgrantee level but may be subcontracted out. A full summary of the JTA can be found at: <https://docs.nrel.gov/docs/fy14osti/60447.pdf>

Below is a list of the required and recommended training for this role. In some cases, OJT is required

before a formal class. OJT must be documented in the On the Job Training Form. OJT can be offered by the Grantee or the Subgrantee.

Courses and Exams	Format	Duration
Required		
On the Job Training	In Person	30 hours
1) Building Science Principles Training and Exam	Live Webinar	16 hours
2) BPI Building Analyst Technician (BA-T) Training and Exam	Blended	24 hours
3) Weatherization Assistant v10 (WAweb) Training	Live Webinar	24 hours
4) Multifamily Building Analyst Training and Exam	On Demand	12 hours
Recommended (optional)		
N/A		

**Multifamily Quality Control Inspector**

The Multifamily Quality Control Inspector is the job that is primarily responsible for ensuring that program standards and quality have been met in weatherized multifamily dwellings. In accordance with WPN 22-4, Quality Control Inspectors signing off on work in multifamily buildings must have an active Quality Control Inspector certification and successfully complete a comprehensive training program based on the National Renewable Energy Laboratory Multifamily Quality Control Inspector JTA. This position is typically found at the subgrantee level but may be subcontracted out. A full summary of the- Multifamily Quality Control Inspector position can be found at:

<https://www.nrel.gov/docs/fy14osti/60537.pdf>

Below is a list of the required training and timeline for completion. In some cases, OTJ is required before a formal class. OTJ must be documented in the On the Job Training Form found at the end of this plan. OJT can be offered by the Grantee or the Subgrantee.

Courses and Exams	Format	Duration
Required		
On the Job Training	In Person	30
All Required Training Under Multifamily Building Analyst		106 hours
All required Training Under Quality Control Inspector		271 hours
1) Multifamily Quality Control Inspector Training and Exam	On Demand	24 hours
Recommended (optional)		
N/A		

### Ongoing Continuing Education and Professional Development

It is important to engage in continuing and professional education to improve skills and knowledge and ensure the continuous quality of the NC WAP network. Continuing education courses are created and updated regularly to maintain better adaptability to industry changes and the environment.

Course	Format	Recommended Retake
OSHA 10 Refresher	Online	Every 3-5 years
Asbestos Awareness	Online	Annually
Lead RRP Refresher	Blended	In accordance with EPA requirements
Other Course Offerings as available	Various	-

## North Carolina Weatherization Assistance Program ON THE JOB TRAINING FORM – RETROFIT INSTALLER TECHNICIAN - Example

Job Description: The Retrofit Installer Technician (also known as crew member, housing technician, and carpenter) is an entry level position that is primarily responsible for installing energy efficiency measures (air sealing, duct sealing, insulation installation, etc.). The following items are key abilities that shall be covered in on the job training (OJT). Select training topics from the list below.

Subgrantee \_\_\_\_\_ Date of Training: \_\_\_\_\_

Select Topic(s):

Hook up to fall protection	Review scope of work	Identify duct leaks	Remove roofing system
Put on PPE	Report items not on scope	Seal ducts leaks	Flash new penetrations
Lock out/tag out protocol	Control dust and debris	Confirm ducts support	Inventory tools used
Set up ladder/scaffolding	Identify leaks and bypasses	Confirm duct insulation	Inventory materials used
Inspect jobsite for hazards	Seal air leaks	Install wind baffles	Clean jobsite
Follow LSW practices	Identify for code violations	Install blocking	Participate in debrief
Install moisture barrier	Verify flashing	Install vertical insulation	Interact with client
Report bulk moisture	Install flashing	Install horizontal insulation	Other:

Showed WxTV video on Attic Prep & Insulation  
 Presented Sections 1 & 4 of Installer/Technician Fundamentals 2.0 from www.WAPTAC.org  
 Reviewed relevant air sealing, duct sealing, and air sealing sections of the NC Installation Standards  
 Demonstrated capping a chase, sealing balloon framing, flagging junction boxes, and placing depth markers  
 Observed trainee capping a chase, sealing balloon framing, flagging junction boxes, and placing depth markers.

Select how **each** Topic(s) was covered below (observation, demonstration, quiz, etc.)

Will cover ducts and flashing at W001-15 on March 13, 2026  
 Trainee will do Lead Safe Work Practices Training the week of March 24, 2026.

Describe any planned follow-up and target date:

As the Instructor, I have covered the topics indicated above in the manner specified and the trainee has demonstrated basic competency. As the Trainee, I certify that I have received training on the topics above.

Instructor's Information:

\_\_\_\_\_  
\_\_\_\_\_

Trainee's Information:

\_\_\_\_\_  
\_\_\_\_\_

## North Carolina Weatherization Assistance Program ON THE JOB TRAINING FORM – RETROFIT INSTALLER TECHNICIAN

Job Description: The Retrofit Installer Technician (also known as crew member, housing technician, and carpenter) is an entry level position that is primarily responsible for installing energy efficiency measures (air sealing, duct sealing, insulation installation, etc.). The following items are key abilities that shall be covered in on the job training (OJT). Select training topics from the list below.

Subgrantee \_\_\_\_\_ Date of Training: \_\_\_\_\_

**Select Topic(s)**

<input type="checkbox"/> Hook up to fall protection	<input type="checkbox"/> Review scope of work	<input type="checkbox"/> Identify duct leaks	<input type="checkbox"/> Remove roofing system
<input type="checkbox"/> Put on PPE	<input type="checkbox"/> Report items not on scope	<input type="checkbox"/> Seal ducts leaks	<input type="checkbox"/> Flash new penetrations
<input type="checkbox"/> Lock out/tag out protocol	<input type="checkbox"/> Control dust and debris	<input type="checkbox"/> Confirm ducts support	<input type="checkbox"/> Inventory tools used
<input type="checkbox"/> Set up ladder/scaffolding	<input type="checkbox"/> Identify leaks and bypasses	<input type="checkbox"/> Confirm duct insulation	<input type="checkbox"/> Inventory materials used
<input type="checkbox"/> Inspect jobsite for hazards	<input type="checkbox"/> Seal air leaks	<input type="checkbox"/> Install wind baffles	<input type="checkbox"/> Clean jobsite
<input type="checkbox"/> Follow LSW practices	<input type="checkbox"/> Identify for code violations	<input type="checkbox"/> Install blocking	<input type="checkbox"/> Participate in debrief
<input type="checkbox"/> Install moisture barrier	<input type="checkbox"/> Verify flashing	<input type="checkbox"/> Install vertical insulation	<input type="checkbox"/> Interact with client
<input type="checkbox"/> Report bulk moisture	<input type="checkbox"/> Install flashing	<input type="checkbox"/> Install horizontal insulation	Other:

Select how **each** Topic(s) was covered below (observation, demonstration, quiz, etc.)

Describe any planned follow-up and target date

As the Instructor, I have covered the topics indicated above in the manner specified and the trainee has demonstrated basic competency. As the Trainee, I certify that I have received training on the topics above.

Instructor’s Information:

Trainee’s Information:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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## North Carolina Weatherization Assistance Program ON THE JOB TRAINING FORM – CREW LEADER

Job Description: The Crew Leader (also known as foreman) is the job that is primarily responsible for supervising and assisting in the retrofitting activities. Crew Leaders are trained to oversee installations, manage crews, and ensure work meets program standards and specifications. The Crew Leader is responsible for quality control, testing procedures, documentation, and conducting a final walk-through to ensure that all work is completed in a satisfactory manner

Subgrantee \_\_\_\_\_ Date of Training: \_\_\_\_\_

**Select Topic(s):**

<input type="checkbox"/> Identify required paperwork	<input type="checkbox"/> Visually inspect job	<input type="checkbox"/> Revise work order if needed	<input type="checkbox"/> Document material usage
<input type="checkbox"/> Develop work schedule	<input type="checkbox"/> Confirm prerequisite work	<input type="checkbox"/> Monitor safety practices	<input type="checkbox"/> Document man hours
<input type="checkbox"/> Evaluate energy audit	<input type="checkbox"/> Develop site safety plan	<input type="checkbox"/> Monitor resources	<input type="checkbox"/> Document lead renovator
<input type="checkbox"/> Evaluate work order	<input type="checkbox"/> Review job with client	<input type="checkbox"/> Verify material usage	<input type="checkbox"/> Document job photo
<input type="checkbox"/> Identify materials needed	<input type="checkbox"/> Answer client questions	<input type="checkbox"/> Verify end of day clean up	<input type="checkbox"/> Document change orders
<input type="checkbox"/> Identify staff needed	<input type="checkbox"/> Protect interior of home	<input type="checkbox"/> Verify completed work	<input type="checkbox"/> Lead crew debrief
<input type="checkbox"/> Identify PPE needed	<input type="checkbox"/> Test in/interim readings	<input type="checkbox"/> Test out	<input type="checkbox"/> Submit all documentation
<input type="checkbox"/> Set client expectations	<input type="checkbox"/> Execute work order	<input type="checkbox"/> Complete clean up	Other: _____

Select how **each** Topic(s) was covered below (observation, demonstration, quiz, etc.)

Describe any planned follow-up and target date

As the Instructor, I have covered the topics indicated above in the manner specified and the trainee has demonstrated basic competency. As the Trainee, I certify that I have received training on the topics above.

Instructor's Information:

Trainee's Information:

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## North Carolina Weatherization Assistance Program ON THE JOB TRAINING FORM – ENERGY AUDITOR

Job Description: The Energy Auditor (also known as auditor) is the job that is primarily responsible for evaluating the health and safety issues, durability, comfort, and energy use of a residential building. The Energy Auditor conducts advanced diagnostic tests, gathers and analyzes data, and creates energy models to draw conclusions and make recommendations to the client for improvements. This pathway emphasizes diagnostic testing, data collection, health and safety, and preparation for nationally recognized auditor certifications.

Subgrantee \_\_\_\_\_ Date of Training: \_\_\_\_\_

Select Topic(s):

<input type="checkbox"/> Establish client relations	<input type="checkbox"/> Get building measurements	<input type="checkbox"/> Collect door data	<input type="checkbox"/> Evaluate H&S
<input type="checkbox"/> Represent the organization	<input type="checkbox"/> Collect appliance data	<input type="checkbox"/> Collect foundation data	<input type="checkbox"/> Evaluate structural integrity
<input type="checkbox"/> Maintain professionalism	<input type="checkbox"/> Collect H&S data	<input type="checkbox"/> Collect roof data	<input type="checkbox"/> Scan walls with IR camera
<input type="checkbox"/> Collect building information	<input type="checkbox"/> Collect ventilation data	<input type="checkbox"/> Perform blower door test	<input type="checkbox"/> Determine if SHPO needed
<input type="checkbox"/> Review energy consumption	<input type="checkbox"/> Identify building insulation	<input type="checkbox"/> Perform duct test	<input type="checkbox"/> Select measures to be done
<input type="checkbox"/> Document building history	<input type="checkbox"/> Collect attic data	<input type="checkbox"/> Evaluate appliances	<input type="checkbox"/> Generate work order
<input type="checkbox"/> Visual inspection building	<input type="checkbox"/> Collect window data	<input type="checkbox"/> Evaluate HVAC system	<input type="checkbox"/> Discuss job in Crew Leader
<input type="checkbox"/> Collect base load data	<input type="checkbox"/> Collect wall data	<input type="checkbox"/> Perform combustion tests	Other: _____

Select how **each** Topic(s) was covered below (observation, demonstration, quiz, etc.)

Describe any planned follow-up and target date

As the Instructor, I have covered the topics indicated above in the manner specified and the trainee has demonstrated basic competency. As the Trainee, I certify that I have received training on the topics above.

Instructor's Information:

Trainee's Information:

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## North Carolina Weatherization Assistance Program ON THE JOB TRAINING FORM – QUALITY CONTROL INSPECTOR

Job Description: The Quality Control Inspector (also known as final inspector) is the job that is primarily responsible for ensuring the completion, appropriateness, and quality of energy upgrade work by conducting a methodical inspection of the building and performing safety and diagnostic tests. QCI's ensure compliance with DOE and NC WAP standards, support continuous improvement, and protect program integrity through rigorous quality assurance practices.

Subgrantee \_\_\_\_\_ Date of Training: \_\_\_\_\_

**Select Topic(s)**

<input type="checkbox"/> Maintain professionalism	<input type="checkbox"/> Review all invoices	<input type="checkbox"/> Determine pass/fail of work	<input type="checkbox"/> Document work w/ photos
<input type="checkbox"/> Review client file	<input type="checkbox"/> Review lead renovator	<input type="checkbox"/> Determine work complete	<input type="checkbox"/> Have client sign off on job
<input type="checkbox"/> Review scope of work	<input type="checkbox"/> Review SHPO	<input type="checkbox"/> Verify no missed measures	<input type="checkbox"/> Sign off on job
<input type="checkbox"/> Review energy audit	<input type="checkbox"/> Verify account coding	<input type="checkbox"/> Document deficiencies	Other: _____

Select how **each** Topic(s) was covered below (observation, demonstration, quiz, etc.)

Describe any planned follow-up and target date

As the Instructor, I have covered the topics indicated above in the manner specified and the trainee has demonstrated basic competency. As the Trainee, I certify that I have received training on the topics above.

**Instructor's Information:**

**Trainee's Information:**

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## North Carolina Weatherization Assistance Program ON THE JOB TRAINING FORM – MULTIFAMILY BUILDING ANALYST

Job Description: The Multifamily Building Analyst (also known as auditor) is the job that is primarily responsible for evaluating the health and safety issues, durability, comfort, and energy use of a multifamily residential building. The Multifamily Building Analyst conducts advanced diagnostic tests, gathers and analyzes data, and creates energy models to draw conclusions and make recommendations to the client for improvements.

Subgrantee \_\_\_\_\_ Date of Training: \_\_\_\_\_

**Select Topic(s):**

Establish client relations	Get building measurements	Collect door data	Evaluate H&S
Represent the organization	Collect appliance data	Collect foundation data	Evaluate structural integrity
Maintain professionalism	Collect H&S data	Collect roof data	Scan walls with IR camera
Collect building information	Collect ventilation data	Perform blower door test	Determine if SHPO needed
Review energy consumption	Identify building insulation	Perform duct test	Select measures to be done
Document building history	Collect attic data	Evaluate appliances	Generate work order
Visual inspection building	Collect window data	Evaluate HVAC system	Discuss job in Crew Leader
Collect base load data	Collect wall data	Perform combustion tests	Other: _____

Select how **each** Topic(s) was covered below (observation, demonstration, quiz, etc.)

Describe any planned follow-up and target date

As the Instructor, I have covered the topics indicated above in the manner specified and the trainee has demonstrated basic competency. As the Trainee, I certify that I have received training on the topics above.

Instructor’s Information:

Trainee’s Information:

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## North Carolina Weatherization Assistance Program ON THE JOB TRAINING FORM – MULTIFAMILY QUALITY CONTROL INSPECTOR

Job Description: The Multifamily Quality Control Inspector is the job that is primarily responsible for ensuring that program standards and quality have been met in weatherized multifamily dwellings. In accordance with WPN 22-4, Quality Control Inspectors signing off on work in multifamily buildings must have an active Quality Control Inspector certification and successfully complete a comprehensive training program based on the National Renewable Energy Laboratory Multifamily Quality Control Inspector job task analysis.

Subgrantee \_\_\_\_\_ Date of Training: \_\_\_\_\_

### Select Topic(s)

<input type="checkbox"/> Maintain professionalism	<input type="checkbox"/> Review all invoices	<input type="checkbox"/> Determine pass/fail of work	<input type="checkbox"/> Document work w/ photos
<input type="checkbox"/> Review client file	<input type="checkbox"/> Review lead renovator	<input type="checkbox"/> Determine work complete	<input type="checkbox"/> Have client sign off on job
<input type="checkbox"/> Review scope of work	<input type="checkbox"/> Review SHPO	<input type="checkbox"/> Verify no missed measures	<input type="checkbox"/> Sign off on job
<input type="checkbox"/> Review energy audit	<input type="checkbox"/> Verify account coding	<input type="checkbox"/> Document deficiencies	Other: _____

Select how **each** Topic(s) was covered below (observation, demonstration, quiz, etc.)

Describe any planned follow-up and target date

As the Instructor, I have covered the topics indicated above in the manner specified and the trainee has demonstrated basic competency. As the Trainee, I certify that I have received training on the topics above.

Instructor's Information:

Trainee's Information:

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<h1 style="text-align: center;">WPN 22-4 Quality Work Plan Updates</h1> <h2 style="text-align: center;">Glossary of Resources</h2>	Introduction/background	Section 1: SWS	Section 2: Inspections	Section 3: Workforce Training
<a href="#">10 CFR 440 [complete]</a>	X			
<a href="#">Guidelines for Home Energy Professionals Project</a>	X			
<a href="#">WAP Grantee Manager's Training Toolkit</a>	X	X	X	X
<a href="#">WAP Training and Technical Assistance Clearinghouse</a>	X	X	X	X
<a href="#">SWS</a>		X		
<a href="#">SWS Field Guide Photos [Flickr pool]</a>		X		
<a href="#">WAP T&amp;TA Planning &amp; Reporting Template</a>		X		
<a href="#">BPI Certified Professionals Search</a>			X	
<a href="#">BPI HEP Quality Control Inspector Certification Overview</a>			X	
<a href="#">BPI HEP Energy Auditor Certification Overview</a>			X	
<a href="#">Guidelines for Home Energy Professionals (HEP) Certifications</a>			X	
<a href="#">Weatherization Monitoring [Videos, Resources]</a>			X	
<a href="#">WPN 20-4: Weatherization Assistance Program Monitoring Procedures</a>			X	
<a href="#">Accreditation - Why an Accredited Training Program? [Video]</a>			X	X
<a href="#">Accreditation - Flexibility with Accredited Training [Video]</a>			X	X
<a href="#">IREC-Accredited Training Providers Registry</a>			X	X
<a href="#">JTA - Crew Leader - Single Family</a>			X	X
<a href="#">JTA - Energy Auditor - Single Family</a>			X	X
<a href="#">JTA - Energy Auditor - Multifamily</a>			X	X
<a href="#">JTA - Quality Control Inspector - Single Family</a>			X	X
<a href="#">JTA - Quality Control Inspector - Multifamily</a>			X	X
<a href="#">Competency Model - Energy Auditor and Quality Control Inspector [U.S. Department of Labor]</a>				X
<a href="#">Competency Model - Installer and Crew Leader [U.S. Department of Labor]</a>				X
<a href="#">Contractor Training and Technical Assistance Retention Agreement Template</a>				X
<a href="#">Green Buildings Career Map</a>				X
<a href="#">Installer Badges Toolkit for On the Job Training</a>				X
<a href="#">Installer Badges Toolkit for On the Job Training [Video]</a>				X
<a href="#">Installer Badges Toolkit Fact Sheet</a>				X
<a href="#">IREC Accreditation - Key Documents for Candidates</a>				X
<a href="#">IREC Credentials and How to Apply</a>				X
<a href="#">IREC Credentials - FAQ</a>				X
<a href="#">O*NET Summary Report for Weatherization Installers and Technicians [U.S. Department of Labor]</a>				X
<a href="#">WAP Request for Proposals Toolkit for Training &amp; Technical Assistance Services</a>				X

## **Course Descriptions**

### **Asbestos Awareness**

Equips professionals with the knowledge to identify and handle asbestos-containing materials safely, minimizing health risks and ensuring compliance with regulations. This training is crucial for preventing exposure and protecting both workers and building occupants from the serious health hazards associated with asbestos. This course is approved for 1 BPI CEU.

### **BPI Building Science Principles (BSP)**

Introduces fundamental building science concepts, including heat transfer, air flow, and moisture dynamics, providing a common technical foundation for all weatherization roles. During this introductory course, you'll learn how the systems in a homework assignment together to affect energy use, thermal comfort, and indoor air quality. This course is approved for 4 BPI CEUs.

### **BPI Building Analyst Technician (BA-T)**

Prepares participants to conduct residential building science-based diagnostic tests and home performance data collection. This includes combustion safety and carbon monoxide testing, blower door testing, and interior/exterior home inspection. This course is approved for 7.5 BPI CEUs.

### **BPI Building Analyst Professional (BA-P)**

Prepares experienced auditors to perform comprehensive whole-house energy assessments in accordance with BPI professional standards. A BA-P uses energy modeling software to model the energy upgrade potential of a home and to develop a scope of work. BA-P professionals use the data collected from diagnostic tests to determine how a homeowner can improve the energy efficiency of their home, lower their energy bills, and create a healthier/safer space. This course is approved for 2.5 BPI CEUs.

### **BPI Infiltration and Duct Leakage (IDL)**

Focuses on advanced air leakage and duct testing techniques to improve diagnostic accuracy and retrofit outcomes. This course teaches you how to measure, analyze, and reduce air infiltration and duct leakage using industry-standard BPI testing methods to improve comfort, energy performance, and building durability. This course is approved for 2.13 BPI CEUs.

### **BPI Multifamily Building Analyst**

The BPI Multifamily Building Analyst program is for professionals who work with multifamily buildings to improve their energy efficiency, comfort, and safety. This certification focuses on the unique characteristics and challenges associated with multifamily buildings, such as their varied occupancy, multiple units, and complex systems. This course is approved for 4 BPI CEUs.

### **Crew Leader II: Leadership and Conflict Resolution (Crew Leader Training)**

Builds leadership, communication, and conflict resolution skills for crew leaders managing field teams.

### **Customer Service**

Focuses on effective communication, client interaction, and professionalism to support positive customer experiences and successful program delivery.

### **EPA RRP Lead Safe Renovator – Initial**

Delivers EPA-required training on lead-safe work practices to protect occupants and workers during renovation and weatherization activities. This course is approved for 6 BPI CEUs.

### **EPA RRP Lead Safe Renovator – Refresher**

Provides refresher training to maintain EPA Lead Safe Renovator certification and reinforce compliance with lead safety requirements. This course is approved for 2.5 BPI CEUs.

### **HEP Energy Auditor (EA)**

Provides training aligned with Home Energy Professional standards for residential energy auditing. Offered by the Building Performance Institute and supported by the U.S. Department of Energy and the National Renewable Energy Laboratory, the Home Energy Professional (HEP) Energy Auditor Certification is one of the industry's highest credentials for home energy auditing. This course is approved for 9.5 BPI CEUs.

### **HEP Quality Control Inspector (QCI)**

Prepares participants to perform independent inspections and verify compliance with program and technical standards. A QCI is a residential energy efficiency professional who ensures the completion, appropriateness, and quality of energy upgrade work by conducting a methodological audit/inspection of the building, which includes performing safety and diagnostic tests and observing the work. This course is approved for 9.88 BPI CEUs.

### **Introduction to ASHRAE 62.2**

Introduces residential ventilation standards and requirements to support occupant health and safety, which are critical for creating healthier living environments. This course not only covers the latest standards and requirements but also enhances your skills in selecting and implementing effective ventilation systems for various building projects. This course is approved for 1 BPI CEU.

### **Introduction to Heat Pumps**

Introduces heat pump technology, system types, and basic operation within residential energy efficiency and weatherization contexts.

### **Multifamily Quality Control Inspector (QCI)**

Multifamily Quality Control Inspector training provides the skills needed to assess and verify the quality of energy efficiency upgrades in multifamily buildings. This training ensures that projects meet industry standards, enhancing building performance and ensuring that energy-saving measures are properly implemented for long-term benefits. This course is approved for 18 BPI CEUs.

### **OSHA 10**

Covers foundational occupational safety and health standards applicable to construction and weatherization work. The OSHA 10 Construction Safety Training is a fundamental safety training

program developed by the Occupational Safety and Health Administration (OSHA) in the United States. It is designed to provide entry-level construction workers with essential knowledge about workplace safety and health hazards, ensuring they understand how to prevent accidents and injuries on the job.

### **Retrofit Installer Technician**

Delivers in-depth technical instruction on the installation of shell and mechanical energy efficiency measures, supported by hands-on practice. A Retrofit Installer Technician specializes in implementing energy-efficient upgrades in buildings, ensuring the proper installation and functionality of energy-saving measures. Their Crew Leader counterparts oversee weatherization and energy upgrade projects, focusing on project planning, quality control, safety, and effective communication with teams and clients. This course is approved for 12.5 BPI CEUs.

### **Weatherization 101**

Provides an overview of the Weatherization Assistance Program (WAP), including program objectives, eligible measures, and the roles and responsibilities of staff and contractors. Participants will learn about their specific roles within the program, understand the importance of their contributions to energy efficiency and support for low-income households, and gain insights into how their work makes a difference. This course is approved for 2 BPI CEUs.

### **Weatherization Assistant v10 (WAweb)**

Trains participants on the use of the WAweb system for data entry, reporting, and program documentation. WAweb training empowers professionals with the skills to efficiently utilize cutting-edge software for energy audits and building assessments, enhancing the accuracy and effectiveness of weatherization projects. This course is approved for 12 BPI CEUs.

### **Weatherization Finance**

Provides a comprehensive overview of financial aspects related to weatherization programs focusing on understanding funding sources, budgeting techniques, and cost principles for weatherization projects.