



BUILDING
PERFORMANCE
INSTITUTE, INC.

**BPI Small Homes
Certification**

Policies & Procedures Manual

**RAISING THE BAR IN BUILDING
PERFORMANCE CONTRACTING**

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Vision of BPI

To be the global leader in developing a highly professional building performance industry.

Mission of BPI

To ensure that the professional bar for excellence in building performance contracting is established and maintained at the appropriate level by creating and regularly updating technical requirements through an open, transparent consensus development process.

To measure the knowledge, skills and competency of individuals, and to evaluate the organizations impacting building performance using an integrated certification, accreditation and quality assurance program designed to support the building performance contracting industry.

To offer added value support services that promote and stimulate infrastructure development with an emphasis placed on education and outreach, in regard to the benefits of the building performance industry.

Motto of BPI

First, do no harm...to life, limb or property.

Slogan of BPI

Raising the Bar in Building Performance Contracting

Acknowledgements

The Building Performance Institute, Inc. would like to thank those who support the BPI national expansion and all of the dedicated professionals who have participated in the development of this document.

Disclaimer

BPI will make a reasonable effort to keep the most up to date version of this document posted at www.bpi.org. Before participating in any available service through BPI it is recommended that you check with BPI to ensure that you have based your decision to proceed on the most up-to-date information available. BPI reserves the right to modify the documents prior to accepting any application.

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Terms and Definitions

BPI Certification – A rigorous, credible, and defensible written and field examination process administered to individuals by BPI or its affiliates, to prove knowledge, skills and professional competency in the building performance industry designations.

BPI Certified Professional – An individual who successfully passes the BPI written and field examination requirements for certification.

BPI Knowledge Essential Task List (KETL) – The comprehensive list of knowledge, skills and tasks an individual is expected to demonstrate mastery of, in order to earn BPI certification. **PLEASE NOTE:** BPI is replacing its current Knowledge and Skills Areas for Testing with the KETL's as they are updated and available for each designation.

BPI Recognized Training – Formal building science based instruction that has been proven to have pertinent elements in its curriculum that aligns with the BPI KETL and BPI National Standards.

Quality Management System – The set of policies and procedures an organization commits to follow to ensure the delivery of quality building performance contracting services which includes, but is not limited to, quality planning, quality control, quality assurance and quality improvement.

Quality Planning – The preparatory actions organizations undergo to determine the impact that their decisions and actions will have on their quality management system.

Quality Improvement – Changes in the quality management system made when an alteration to one or more of the processes is necessary, as is indicated by ongoing feedback.

Quality Control – The observation techniques and activities used internally by an organization to evaluate the effectiveness of their quality management system and to provide feedback that may result in quality improvements.

Quality Assurance – The observation techniques and activities used externally by an organization to evaluate the effectiveness of their quality management system and to provide feedback that may result in quality improvements.

BPI Quality Assurance Provider – An independent third party entity qualified by BPI to deliver quality assurance services.

BPI Accredited Organization – An entity that complies with certain requirements set by BPI that is intended to enhance the delivery of consistent, quality focused building performance services.

BPI National Standards – The set of technical protocols and procedures that have been developed through an open, transparent, consensus based process and when followed, may achieve satisfactory levels of building performance.

BPI Quality Assurance Program – A set of requirements used to ensure conformance to certain requirements established by BPI.

BPI Accreditation – A credentialing process for business organizations, administered by BPI, that evaluates certain business practices, technical operations and quality management systems necessary to ensure that building performance can be delivered.

BPI Affiliate – An organization with appropriate staff and other resources that is qualified by BPI to deliver services to expand the network of building performance industry professionals.

BPI Written Examination Proctor - An individual qualified by BPI to deliver written examinations on behalf of a BPI Affiliate.

BPI Field Examiner - An individual qualified by BPI to deliver field examination services on behalf of a BPI Affiliate.

Introduction to BPI

Building Performance Institute, Inc. (BPI) is a recognized global leader, supporting the development of a highly professional building performance industry through individual and organizational credentialing and a rigorous quality assurance program. BPI offers the following:

- certification of individuals in evaluation, mechanical, envelope and multi-family designations
- accreditation of organizations committed to using a quality management system
- quality assurance to verify conformance and provide feedback
- affiliation of organizations capable of providing localized delivery of BPI services
- open, transparent, consensus developed national technical standards based on sound building science

BPI, in cooperation with the building performance industry stakeholders, are able to establish a professional performance bar at an appropriate level that ensures the consistent delivery of exceptional building performance service to those entrusting the BPI brand.

Headquartered in the Saratoga Technology + Energy Park (STEP) in Malta, New York, BPI is now supported by organizations around the globe. BPI originated in 1993 by a group of building tradesman, product manufacturers, and a number of public program professionals. Their vision was to create a resource for independent, third-party verification of worker skills in the weatherization industry and building trades. In 1996, the first certifications were issued for weatherization auditors and installation personnel. Since that time, BPI has expanded its capabilities to serve not only the weatherization industry, but also the growing building performance contracting industry from both a residential and multifamily buildings perspective.

Introduction to BPI Small Homes Certifications

These policy and procedures provide important information about the certification process for candidates, BPI Accredited Organizations employing certified professionals, BPI Affiliates offering examinations and weatherization programs and various entities using or considering BPI credentialing services.

The BPI Certification designations that are trade related (i.e., Mechanical and Envelope series) are not intended to take the place of any available trade industry certifications that are typically focused on service and installation knowledge and skills. BPI Certifications are focused on a candidate proving their ability to evaluate and to optimize the performance of improvements in installation and in the operation and service of building systems. BPI Certifications also ensure that the candidate understands the interaction of specific building systems with other building systems so that it does not create conditions that are harmful to life, limb or property.

This document covers the BPI certifications available in the residential small homes designation areas, envelope, evaluation, and mechanical, as illustrated in the certification model diagram on the following page. Each certification designation offered by BPI is developed through an open, transparent, credible, defensible process to ensure that the knowledge, skills and competencies, essential for earning the credential, are properly evaluated through a series of written and field exams.

BPI also offers a complete set of multifamily certifications. To create awareness about the availability of these designations, the multifamily certifications are illustrated in the chart on the following page. The specific details about the multifamily certifications will be provided in a separate document. For more information about multifamily designations, contact BPI.

BUILDING PERFORMANCE INSTITUTE, INC. SMALL HOMES CERTIFICATION MODEL (Typically 1-4 residential unit buildings) <small>*Future Designations</small>				
Small Homes Comprehensive Services Professional*				
			Mechanical Professional	
Building Analyst Professional	Envelope Professional	Manufactured Housing Professional	Heating Professional	A/C or Heat Pump Professional
EVALUATION DESIGNATION	ENVELOPE DESIGNATIONS		MECHANICAL DESIGNATIONS	

BUILDING PERFORMANCE INSTITUTE, INC. MULTIFAMILY BUILDINGS CERTIFICATION MODEL (Typically 5+ residential units) <small>*Future Designations</small>			
Multifamily Comprehensive Services Professional*			
Multifamily Building Analyst Professional	Energy Efficient Multifamily Building Operations Professional	Multifamily Hydronic Heating System Design Professional	Multifamily Advanced Heating Plant Technician
MULTIFAMILY BUILDING DESIGNATIONS			

BPI Certified professionals work in a highly professional industry. BPI has determined, through a job task analysis process, that building performance professionals have a much wider range of knowledge, skills and competencies in which they are responsible for, than their counterparts working in certain disciplines that do not focus attention on works that impact the whole building.

Earning BPI Certification is challenging, but once achieved, the professional has a credential that becomes a powerful tool to assist in communicating their capabilities with employers and potential customers. The certification process also provides individuals with valuable feedback on areas where they could enhance their professional accuracy through further study or practical experience. Statistical information will be gathered during the certification process and will be used to provide trainers with feedback on areas where more emphasis may need to be focused.

General Requirements for BPI Certification Candidates

Certification Eligibility

BPI Certification programs are operated in accordance with Title VI, of the Civil Rights Act of 1964, that states no person shall, on the grounds of race, color or national origin, be excluded from participation in, be denied the benefits of, or be subject to discrimination under any program or activity receiving federal financial assistance. BPI accepts and awards individual and organizational

credentials regardless of membership or membership status in any organization, association, program or group. BPI has no members and is not a membership organization.

While no formal experience or training is a prerequisite to participate in most examinations, it is strongly recommended that a candidate seek training and have some experience in the building performance industry before attempting any BPI certification designations. BPI does have prerequisite examination requirements before attempting certain senior or advanced level certifications. BPI does not require that its written examinations be attempted before field examinations; however, both written and field examinations must be passed prior to earning any BPI Certification.

Steps for BPI Certification

1. Review the Policies & Procedures for BPI Certification
2. Review the Primary Knowledge Areas Chart, Knowledge Essential Task Lists (KETL) and the BPI National Standards for each certification designation being considered
3. Determine if training is required prior to attempting certification
*While BPI does not require training prior to attempting certification, candidates seeking training may find BPI Recognized Training listed at www.bpi.org. BPI does not directly perform **ANY** training services. It is not a requirement to use BPI Recognized Training. Individuals completing training typically perform better on BPI examinations.*
4. Submit a candidate application form:
 - a. Candidates who are attempting to earn a BPI certification for the first time and who have not earned any other designation, should register for the new written examination and the new field examination. In addition to the field examination, candidates will be administered a **100 question** written examination that covers certain fundamentals of building science, as well as, knowledge specific to the designation being attempted
 - b. Candidates who are attempting to earn subsequent BPI certification(s) and who have earned one or more BPI certifications, or have completed a **100 question** exam while attempting to earn another designation during this examination session, should register for the new written examination(s) and the new field examination(s). In addition to field examinations, candidates will be administered a **50 question** written examination focused on the knowledge specific to the designation(s) the candidate is attempting
5. Schedule your exam(s)
6. Complete the applicable exams successfully, with a passing rate of 70% or higher

Recertification Requirements

Recertification is required every three years and can be completed three different ways:

1. **Option #1:** Complete and submit **30 units** of qualified continuing education and successfully pass a field examination only for each designation
2. **Option #2:** Complete and submit **10 - 29 units** of qualified continuing education and successfully pass a **50 question** written examination and field examination for each designation
3. **Option #3:** Complete and submit less than **10 units** of qualified continuing education and successfully pass a **100 question** written examination and a field examination for each designation

Steps for Renewing BPI Certification

1. Participate in qualifying continuing education prior to the expiration date of certification. Qualifying continuing education may include:
 - a. BPI Recognized Training

These policies and procedures were ratified by the BPI Board of Directors on May 17, 2006 and are effective July 1, 2006. Entities shall transition to these new requirements as prescribed by BPI in a transition plan available at www.bpi.org.

- b. Training completed where a candidate can demonstrate satisfactorily to BPI that it aligns with the Primary Knowledge Areas, Knowledge Essential Task Lists (KETL) and the BPI National Standards
2. Submit a candidate application form:
 - a. Candidates who desire to renew BPI Certification for each designation with **30 or more units** of continuing education shall be required to register for, and to successfully pass, a renewal field examination only
 - b. Candidates who desire to renew BPI Certification with **10-29 units** of continuing education shall be required to register for, and to successfully pass, a renewal field examination and a **(50) question** renewal written examination
 - c. Candidates who desire to renew BPI Certification with less than **10 units** of continuing education shall be required to register for, and to successfully pass, a renewal field examination and a **(100) question** renewal written examination
 - d. Candidates who earn certain advanced level designations shall not be required to meet the continuing education unit requirements of the lower level certifications, in addition to the advanced level requirements in the same designation family, provided that the candidate does not let their certifications lapse
3. Schedule your exam(s)
4. Complete the applicable exams successfully, with a passing rate of 70% or higher

Award of Certification Credentials

Award of BPI Certification credentials shall be made once candidates successfully pass required examinations and complete any additional requirements, including, but not limited to, making payments or arrangements and submission of any applicable documentation.

Each BPI Certified professional will receive:

- Photo identification badge with candidate identification number
- Certificate for each certification earned
- BPI Certified uniform patches with supporting regalia, indicating each certification awarded and each certification earned

Additional logo branded merchandise is available for purchase through www.bpi.org

Please Note: Proper use of the BPI brand is detailed in the BPI Brand Use Policies & Procedures.

Examination Specifications, Ability Levels and Technical Resources

Candidates should familiarize themselves with the examination specifications provided. Candidates should become very familiar with the primary knowledge areas for each certification which are detailed on the following page. In addition, the Knowledge and Skills Areas for Testing are being replaced by the Knowledge Essential Task List (KETL) and are available through www.bpi.org. The BPI National Standards are available as an important resource for certification preparation. Before applying for or attempting any of the BPI certification examinations, each candidate is strongly encouraged to review these documents. It is the candidate's responsibility to prepare for, and understand the technical material, that may be examined on the BPI Certification examinations. BPI Staff and its Affiliate representatives may provide general guidance on the format and general subject areas of exams but shall never disclose specific information, including examination questions that might compromise the integrity of the examination or the certification credentialing process.

Building Performance Institute, Inc. Knowledge Areas for Certification Designations

Building Analyst Professional	Envelope Professional	Manufactured Housing Professional	Heating Professional	A/C or Heat Pump Professional
Building Science (Fundamentals)	Building Science (Intermediate)	Building Science (Intermediate)	Building Science (Intermediate)	Building Science (Intermediate)
Buildings and their Systems (Fundamentals)	Envelope Systems and their interaction with other building systems (Intermediate)	Manufactured Housing Systems and their interaction with other Manufactured Housing systems (Intermediate)	Heating Systems and their interaction with other building systems (Intermediate)	A/C or Heat Pump Systems and their interaction with other building systems (Intermediate)
Measurement and Verification of Building Performance (Fundamentals & Applications)	Measurement and Verification of Building Performance (Intermediate Knowledge and Application)	Measurement and Verification of Building Performance (Intermediate Knowledge and Application)	Measurement and Verification of Building Performance (Intermediate Knowledge and Application)	Measurement and Verification of Building Performance (Intermediate Knowledge and Application)
BPI National Standards & Project Specifications (Fundamentals & Application)	BPI National Standards & Project Specifications (Intermediate Knowledge and Application)	BPI National Standards & Project Specifications (Intermediate Knowledge and Application)	BPI National Standards & Project Specifications (Intermediate Knowledge and Application)	BPI National Standards & Project Specifications (Intermediate Knowledge and Application)
Analyzing Building Systems (Fundamentals)	Optimizing Building Envelopes and their interaction with Building Systems (Intermediate Knowledge and Applications)	Optimizing Manufactured Housing Systems and their interaction with Building Systems (Intermediate Knowledge and Applications)	Optimizing Heating Systems and their interaction with Building Systems (Intermediate Knowledge and Applications)	Optimizing A/C & Heat Pump Systems and their interaction with Building Systems (Intermediate Knowledge and Applications)
Professional Ethics, Conduct & Communications (Fundamentals)	Professional Ethics, Conduct & Communications (Fundamentals)	Professional Ethics, Conduct & Communications (Fundamentals)	Professional Ethics, Conduct & Communications (Fundamentals)	Professional Ethics, Conduct & Communications (Fundamentals)

Building Analyst Professional Certification Examination Specification

This certification is intended for those individuals who conduct building performance audits, including measurement and verification services with related building analysis. Individuals may also specify, sell, and coordinate and/or install certain building performance work.

This certification covers the following knowledge areas which is expanded on in the current BPI Knowledge and Skills Area for Testing, which is being replaced by the Knowledge Essential Task List (KETL) and the BPI National Standards.

Knowledge Area	Written	Field
Building Science (Fundamentals)	15%	10%
Buildings and their Systems (Fundamentals)	15%	20%
Measurement & Verification of Building Performance (Fundamentals/Application)	20%	40%
BPI National Standards and Project Specifications (Fundamentals/Application)	25%	30%
Analyzing Building Systems (Fundamentals/Application)	20%	0%
Professional Ethics, Conduct and Communications (Fundamentals)	5%	10%

PATHS TO EARN BPI BUILDING ANALYST PROFESSIONAL CERTIFICATION	
BPI Building Analyst Professional 100 Question Written Examination plus BPI Building Analyst Professional Field Examination equals BPI Certified Building Analyst Professional	HERS Certification plus BPI Building Analyst Professional 50 Question Written Examination plus BPI Building Analyst Professional Field Examination Equals BPI Certified Building Analyst Professional

Written Examination		Field Examination	
X	Open book using only written BPI National Standards	X	Open book using any non-electronic references
X	70% passing score required	X	70% passing score required
X	100 question written examination as illustrated	X	Hands on field practical examination required for all individuals attempting certification or recertification
X	50 question written examination as illustrated		
X	2 hour time limit for 100 question examination	X	1.5 hour time limit on practical examination
X	1.5 hour time limit for 50 question examination		
X	Recertification required every three years		
X	HERS certified individuals may earn the BPI Building Analyst Professional certification by passing the 50 question BPI written exam and the BPI field examination, with acceptable proof of HERS certification.		
X	This certification may be attempted directly without earning other BPI Certifications		

Envelope Professional Certification Examination Specification

This certification is intended for those individuals who optimize installation, operation and maintenance, as well as, measure and verify the performance of envelope systems and address their interaction with other building systems from a building science perspective.

This certification covers the following knowledge areas, which is expanded on in the current BPI Knowledge and Skills Area for Testing, which is being replaced by the Knowledge Essential Task List (KETL) and the BPI National Standards.

Knowledge Area	Written	Field
Building Science (Intermediate)	15%	0%
Envelope Systems and their interaction with other building systems (Intermediate)	15%	35%
Measurement and Verification of Building Performance (Intermediate Knowledge and Application)	20%	25%
BPI National Standards and Project Specifications (Intermediate Knowledge and Application)	20%	0%
Optimizing the Installation, Operation and Maintenance of Envelope Systems (Fundamentals /Application)	25%	40%
Professional Ethics, Conduct and Communications (Fundamentals)	5%	0%

PATHS TO EARN BPI ENVELOPE PROFESSIONAL CERTIFICATION	
BPI Envelope Professional 100 Question Written Examination plus BPI Envelope Professional Field Examination equals BPI Certified Envelope Professional	Any other BPI Certification plus BPI Envelope Professional 50 Question Written Examination plus BPI Envelope Professional Field Examination equals BPI Certified Envelope Professional

Written Examination		Field Examination	
X	Open book using only written BPI National Standards	X	Open book using any non-electronic references
X	70% passing score required	X	70% passing score required
X	100 question written examination as illustrated	X	Hands on field practical examination required for all individuals attempting certification or recertification
X	50 question written examination as illustrated		
X	2 hour time limit for 100 question examination	X	1.5 hour time limit on practical examination
X	1.5 hour time limit for 50 question examination		
X	Recertification required every three years		
X	This certification may be attempted directly without earning other BPI Certifications		

Manufactured Housing Professional Certification Examination Specification

This certification is intended for those individuals who optimize installation, operation and maintenance, as well as, measure and verify the performance of manufactured housing systems and address their interaction with other building systems from a building science perspective.

This certification covers the following knowledge areas, which is expanded on in the current BPI Knowledge and Skills Area for Testing, which is being replaced by the Knowledge Essential Task List (KETL) and the BPI National Standards.

Knowledge Area	Written	Field
Building Science (Intermediate)	15%	0%
Manufactured Housing systems and their interaction with other building systems (Intermediate)	15%	35%
Measurement and Verification of Building Performance (Intermediate Knowledge & Application)	20%	25%
BPI National Standards and Project Specifications (Intermediate Knowledge and Application)	20%	0%
Optimizing Manufactured Housing Systems and their interaction with Building Systems (Intermediate Knowledge and Applications)	25%	40%
Professional Ethics, Conduct and Communications (Fundamentals)	5%	0%

PATHS TO EARN BPI MANUFACTURED HOUSING PROFESSIONAL CERTIFICATION	
BPI Manufactured Housing Professional 100 Question Written Examination plus BPI Manufactured Housing Professional Field Examination equals BPI Certified Manufactured Housing Professional	Any other BPI Certification plus BPI Manufactured Housing Professional 50 Question Written Examination plus BPI Manufactured Housing Professional Field Examination equals BPI Certified Manufactured Housing Professional

Written Examination		Field Examination	
X	Open book using only written BPI National Standards	X	Open book using any non-electronic references
X	70% passing score required	X	70% passing score required
X	100 question written examination as illustrated	X	Hands on field practical examination required for all individuals attempting certification or recertification
X	50 question written examination as illustrated		
X	2 hour time limit for 100 question examination	X	1.5 hour time limit on practical examination
X	1.5 hour time limit for 50 question examination		
X	Recertification required every three years		
X	This certification may be attempted directly without earning other BPI Certifications		

Heating Professional Certification Examination Specification

This certification is intended for those individuals who optimize installation, operation and maintenance, as well as, measure and verify the performance fossil fuel based heating systems and address their interaction with other building systems, from a building science perspective.

This certification covers the following knowledge areas, which is expanded on in the current BPI Knowledge and Skills Area for Testing, which is being replaced by the Knowledge Essential Task List (KETL) and the BPI National Standards.

Knowledge Area	Written	Field
Building Science (Intermediate)	15%	0%
Heating Systems and their interaction with other building systems (Intermediate)	15%	35%
Measurement and Verification of Building Performance (Intermediate Knowledge and Application)	20%	25%
BPI National Standards and Project Specifications (Intermediate Knowledge and Application)	20%	0%
Optimizing the Installation, Operation and Maintenance of Building Systems (Fundamentals/Application)	25%	40%
Professional Ethics, Conduct and Communications (Fundamentals)	5%	0%

PATHS TO EARN BPI HEATING PROFESSIONAL CERTIFICATION		
BPI Heating Professional 100 Question Written Examination plus BPI Heating Professional Field Examination equals BPI Certified Heating Professional	Any other BPI Certification plus BPI Heating Professional 50 Question Written Examination plus BPI Heating Professional Field Examination equals BPI Certified Heating Professional	NATE Heating Service Certification plus BPI Heating Professional 50 Question Written Examination plus BPI Heating Professional Field Examination equals BPI Certified Heating Professional

Written Examination		Field Examination	
X	Open book using only written BPI National Standards	X	Open book using any non-electronic references
X	70% passing score required	X	70% passing score required
X	100 question written examination as illustrated	X	Hands on field practical examination required for all individuals attempting certification or recertification
X	50 question written examination as illustrated		
X	2 hour time limit for 100 question examination	X	1.5 hour time limit on practical examination
X	1.5 hour time limit for 50 question examination		
X	Recertification required every three years		
X	NATE Oil or Gas Service certified technicians may earn the BPI Heating Professional certification by passing the 50 question BPI written exam and the BPI field examination, with acceptable proof of NATE certification		
X	This certification may be attempted directly without earning other BPI Certifications		

Air Conditioning or Heat Pump Professional Certification Examination Specification

This certification is intended for those individuals who optimize installation, operation and maintenance, as well as, measure and verify the performance of refrigerant based mechanical systems, either heating or cooling type, and address their interaction with other building systems, from a building science perspective.

This certification covers the following knowledge areas, which is expanded on in the current BPI Knowledge and Skills Area for Testing, which is being replaced by the Knowledge Essential Task List (KETL) and the BPI National Standards. In addition, the NATE Knowledge Areas of Technical Expertise should be reviewed.

Knowledge Area	Written	Field
Building Science (Intermediate)	15%	0%
A/C or Heat Pump Systems and their interaction with other building systems (Intermediate)	15%	35%
Measurement and Verification of Building Performance (Intermediate Knowledge and Application)	20%	25%
BPI National Standards and Project Specifications (Intermediate Knowledge and Application)	20%	0%
Optimizing the Installation, Operation, and Maintenance of Building Systems (Fundamentals/Application)	25%	40%
Professional Ethics, Conduct and Communications (Fundamentals)	5%	0%

PATH TO EARN BPI A/C OR HEAT PUMP PROFESSIONAL CERTIFICATION

40 CFR Section 608 Type II or Universal
plus
 BPI A/C or Heat Pump Professional 50 Question Written Examination
plus
 NATE AC Service **or** NATE Heat Pump Service
 100 Question Written Examination
plus
 BPI A/C or Heat Pump Professional Field Examination
equals
 BPI Certified A/C or Heat Pump Professional

Written Examination		Field Examination	
X	Open book using only written BPI National Standards	X	Open book using any non-electronic references
X	70% passing score required	X	70% passing score required
X	100 question written examination as illustrated	X	Hands on field practical examination required for all individuals attempting certification or recertification
X	50 question written examination as illustrated		
X	Time limit for 100 question examination by NATE		
X	1.5 hour time limit for 50 question examination	X	1.5 hour time limit on practical examination
X	BPI Recertification required every three years (NATE requirements are separate from BPI)		
X	NATE A/C or Heat Pump Service written examination is required to earn this designation		
X	40 CFR Section 608, Type II or Universal, Safe Handling of Refrigerants certification is a prerequisite		
X	NATE A/C or Heat Pump Service certified technicians may earn the BPI A/C or Heat Pump Professional certification by passing the 50 question BPI written exam and the BPI field examination, with acceptable proof of NATE certification in Air Conditioning or Heat Pump Service		
X	This certification may be attempted directly without earning other BPI Certifications		

Pre-Certification Training

While BPI strongly encourages formal training prior to attempting any examinations, it is not a prerequisite. BPI does not directly develop or conduct training for certification candidates.

BPI Recognized Training

BPI Recognized Training is training that has been proven to align with the BPI Knowledge Areas, BPI Knowledge Essential Task List (KETL), and BPI National Standards and has been approved by BPI. This training will also provide a BPI Certified professional an opportunity to earn the units necessary for their recertification or prepare candidates to attempt BPI certification. BPI Recognized Training is made available by industry organizations such as BPI Affiliates or other supporters of BPI. Organizations that perform BPI Recognized Training, and whose schedules are submitted to BPI, can be found on the BPI website at www.bpi.org.

Submission of Application for Certification

Upon meeting the requirements in the examination specifications, applications for Certification/Recertification may be submitted at any time. BPI recommends that candidates plan to allow up to **eight weeks** for scheduling of their examinations. If candidates complete a training before attempting an examination, BPI recommends that candidates apply to BPI for certification prior to training to reduce any wait times.

Applications should be mailed to:

Building Performance Institute, Inc
107 Hermes Road, Suite 110
Malta, NY 12020
Attention: Application for Certification

Fax applications to: 518-899-1622 **Attention:** Application for Certification

Email applications to: info@bpi.org **Attention:** Application for Certification

Candidates Requesting Special Accommodations

In conformance with the Americans with Disabilities Act (ADA), arrangements for persons with disabilities will be provided upon request. Required documentation must be submitted to BPI and/or a BPI Affiliate no later than **four weeks** prior to your scheduled test date.

Time Limits for Completing Certification

From the time any Candidate Application for certification or renewal is logged at BPI, candidates shall have no more than **12 months** total elapsed time for completion of the certification process for each designation. Candidates who fail to comply with this timeframe will be required to retake all relevant exams at the market prices.

Written Examination Fees

Fees for written examinations provided by BPI are detailed in a separate fee schedule. These fees must be paid in advance. Contact the BPI headquarters at 1-877-274-1274 to pay using a major credit card or remit a check payable to BPI. Affiliate fees for examinations may vary from affiliate to affiliate. BPI does not set these prices nor does BPI collect these examination fees. When attempting certification through an affiliate, consult your affiliate for the applicable fees.

(Please note: Payment for examination services is due in full regardless of whether a candidate passes or fails examinations. Results shall not be given until payment is received by BPI or payment arrangements have been made.)

Field Examination Fees

Fees for field examinations provided by BPI are detailed in a standard fee schedule. These fees must be paid in advance. Contact the BPI headquarters at 1-877-274-1274 to pay using a major credit card or remit a check payable to BPI. Affiliate fees for examinations may vary from affiliate to affiliate. BPI does not set these prices nor does BPI collect these examination fees. When attempting certification through an affiliate, consult your affiliate for the applicable fees.

(Please note: Payment for examination services is due in full regardless of whether a candidate passes or fails examinations. Results shall not be given until payment is received by BPI or payment arrangements are made.)

Scheduling of Examinations

Examinations may be scheduled by:

- a. Directly contacting BPI or the BPI Affiliate to set up a mutually convenient time and location
- b. The candidate responding to an announced examination session by BPI or a BPI Affiliate
- c. The candidate contacting BPI directly via email at info@bpi.org
- d. The candidate contacting BPI directly via telephone at 1-877-274-1274
- e. The candidate contacting directly any BPI Affiliate that serves their area via telephone or email; a list of affiliates can be found on the BPI website, www.bpi.org

All examinations scheduled are subject to cancellation and/or rescheduling fees.

Test dates arranged through BPI must be guaranteed by credit card or another form of pre-payment.

Cancellation or Rescheduling of Examinations

In the event of a rescheduled or cancelled appointment the following fees apply:

(Please note: Circumstances, out of the control of the candidate, will be evaluated on a case by case basis.)

Cancellations

Fourteen (14) calendar days or more prior to date:	25% of examination fees
Thirteen (13) calendar days to 72 hours prior to date:	50% of examination fees
Less than 72 hours prior to date:	75% of examination fees

Rescheduling

Fourteen (14) calendar days or more prior to date:	No fee
Thirteen (13) calendar days to 72 hours prior to date:	25% of examination fees
Less than 72 hours prior to date:	50% of examination fees

(Please note: This policy may only be applicable for BPI Staff scheduled examinations, affiliates may or may not use this same schedule or charge the stated rescheduled or cancelled fees.)

Weather/Travel Conditions

BPI recognizes the possibility of adverse weather conditions or travel conditions that may impact the scheduled testing sessions. In such instances, BPI will accommodate the candidate(s) as much as is feasibly possible. If the situation results in a postponement, the candidate or the organization will not be held responsible for rescheduling fees, and a rescheduled date will be determined. BPI will not hold field examinations if the conditions result in an unsafe work environment or unsafe travel conditions.

Equipment Problems

BPI recognizes the possibility for unforeseen equipment failures. This does not include gross equipment abuse or failure to have equipment properly serviced. In such instances, BPI will

accommodate the candidate as much as possible. If the situation results in a postponement or a significant test anomaly, the candidate or the organization will not be held responsible. A rescheduled date will be determined. BPI will not hold field examinations if the conditions result in an unsafe work environment or unsafe travel conditions.

Examination Time Limits

Certification candidates shall use the times, as listed in the examination specifications and in the proctor scripts that accompany the examinations, to complete the elements. It is a candidates right to have the full allotted time for each examination. This does not preclude a session from ending early if a candidate is completed early.

Examination Candidates Rights

Candidates have the following examination-taker rights.

(Reference Source: *Joint Committee on Testing Practices* as modified by BPI in italics)

As a test-taker, you have the right to:

- a. Be informed of your rights and responsibilities as a *examination*-taker
- b. Be treated with courtesy, respect and impartiality, regardless of your age, disability, ethnicity, gender, national origin, religion, sexual orientation or other personal characteristics
- c. Be tested with measures that meet professional standards and are *appropriately*, given *in* the manner in which the *examination* results will be used
- d. Receive a brief oral or written explanation prior to testing *regarding* the purpose(s) for testing, the kind(s) of *examinations* to be used, if the results will be reported to you or to others and the planned use(s) of the results. If you have a disability, you have the right to inquire and receive information about testing accommodations. If you have difficulty in comprehending the language of the test, you have *the* right to *inquire* in advance of testing whether any accommodations may be available to you. *BPI shall allow the candidate, at his or her expense, to have an interpreter present at either a written or a field examination, provided that the interpreter is a bona fide interpreter that is engaged in that profession and that is pre-approved by BPI*
- e. Know in advance of testing when the *examination* will be administered and when *the examination* results will be available to you. *Also*, if there is a fee for testing services that you are expected to *provide*
- f. Have your test administered and your *examination* results interpreted by appropriately trained individuals who follow professional codes of ethics
- g. Know if a *examination* is optional; *and also* learn of the consequences of taking or not taking the *examination*, fully completing the test or canceling the scores. You may need to ask questions to learn these consequences
- h. Receive a written or oral explanation of your *examination* results, within a reasonable amount of time after testing and in commonly understood terms. *The BPI policy on examination processing is covered in a later section*
- i. Have your test results kept confidential to the extent allowed by law
- j. Present concerns about the testing process or your results; and also receive information about procedures that will be used to address such concerns.

Expectations for Field Performance Examination Sites

Test homes or labs for BPI field examinations must have appropriate systems. Ideally, buildings should be less than 2,500 square feet and must be unfamiliar to the candidate. New construction buildings, that are not ready for occupancy, are typically not good candidate locations for BPI

examinations. Laboratory environments can be used for testing on some designations, provided that all elements can be tested.

Materials and Equipment to Bring to the Field Exam Sites

All certification candidates shall plan to bring the equipment, tools, materials and instruments necessary to complete tasks outlined in the Knowledge Essential Task List for their particular certification designation, unless alternative arrangements have been made in advance. With proper advance notice, BPI or BPI Affiliates may be able to supply appropriate equipment, in the event that the candidate does not have their own. BPI does not supply basic tools and materials. The following list should serve as a basic guide and is not to be considered all inclusive. Some items are not required for certain certification designations. All applicable instruments should be calibrated according to manufacturer instructions.

- Fan Assisted, Whole House Pressurization Device
- Fan Assisted, Duct Pressurization Devices
- Digital micro-manometer
- Pressure probes
- Hoses w/connectors
- Pressure Pan
- Digital Carbon Monoxide Analyzer
- Combustion Analyzer
- Digital Thermometer
- Thermocouples
- Gas Leak Detection Device
- Refrigerant Gauges
- Sling Psychrometer
- Pressure and Temperature Chart
- Superheat/Sub Cooling Calculators
- Diagnostic Smoke

Examination References – Open Book/Closed Book

All BPI written examinations are knowledge-based examinations and shall be closed book, with the exception of an unmarked set of BPI National Standards. (**Exception:** *NATE Air Conditioning or Heat Pump examinations may not be conducted with any references at this time*). Any formulas, charts, graphs, tables or other materials needed for testing candidates will be provided as part of the examination booklet.

All BPI field examinations are open book. Field reference materials, including a current set of BPI National Standards, may be used.

Candidates may bring only standard non-graphing calculators. No computers, PDA's, cell phones, pagers or other communication devices are permitted for the BPI examinations.

Examination Scoring

All BPI examinations are processed at BPI Headquarters or through a test administration service. Candidates will typically receive their results four to six weeks after completing the examination, provided that all fees have been remitted and requirements have been met. Candidates may directly call BPI to determine if they have passed or failed however, specific scores and detailed results shall not be provided via telephone.

Retesting upon an Examination Failure

Candidates failing to successfully complete an examination may retake the examination two times within 12 months from the initial examination date. After the 12th month from the initial examination date, candidates must reapply as a new candidate to attempt the certification again. All fees will be in accordance with fee schedules.

Examination Review Requests

BPI will honor hand scoring requests made by individuals who question examination results. BPI will honor requests for in-person written examination reviews. Upon request, the candidate, at his or her own expense and at a mutually acceptable time, may travel to the BPI headquarters to review an examination question(s) that is challenged. The individual may not see their answer or the correct answer for the question. The individual may not record via any means the questions or the answers. BPI shall make any final determinations as to the questions validity using any method it deems appropriate and shall adjust scores for the candidate(s) that are positively affected by any change in the question. Those affected negatively shall not be impacted.

Confidentiality of Information

BPI and BPI Affiliates shall adhere to all policies and procedures regarding candidate confidentiality and shall not release any information regarding any candidate or certified professional without obtaining prior written permission. Forms for this purpose are provided as part of the application. This disclosure form is intended to assist BPI and the BPI Affiliate to protect your information.

Certification Renewal Reminder

BPI will send out reminders for those candidates whose certifications are set to expire in **120 days** prior to the date of their expiration.

Certification Renewal Requirements

Certifications are valid for **three years** from the date the certification is awarded. Within the final six months of the third year of certification, candidates who desire to maintain their certified status will be required to complete a field performance examination, as well as, demonstrate that they have met or exceeded the required continuing education units for each certification designation. If the continuing education units (CEU) requirement is not met, candidates will be required to retake the written examination for the appropriate certification designations impacted. This shall be in addition to their field performance examinations.

Certification Renewal Window

Certified candidates may take field performance verification examinations for renewal up to **six months** prior to their date of their expiration. Regardless of the date of the renewal examination, within that grace period, the new certification period begins from the date of expiration of the candidate's initial certification, unless that date has been modified by BPI. ***(Please Note: Candidates who renew their certifications more than **six months** prior to their expiration date will have their new certification period begin immediately upon renewal.)***

Notice of Contact Information Changes

If a BPI Certified Professional has changed contact information they must notify BPI within **30 days**. Failure to communicate this information may result in missing important correspondence and could be grounds for suspension of a certification credential. All contact information changes may be sent via email to info@bpi.org, by fax to 518-899-1622 or by calling 1-877-274-1274.

Disciplinary Policies

Standards of conduct, such as ethical standards and policies and procedures for disciplinary action, are established and approved by BPI. Grounds for suspension or revocation of certification credentials shall include, but not be limited to:

1. Termination as a result of the period of certification that expires without renewal
2. Evidence of falsification of any information on any documents
3. Evidence of intentional misrepresentation in respect to the certification held
4. Willful violation of the BPI certification policies and procedures

These policies and procedures were ratified by the BPI Board of Directors on May 17, 2006 and are effective July 1, 2006. Entities shall transition to these new requirements as prescribed by BPI in a transition plan available at www.bpi.org.

5. Willful brand use policy violations that are determined to be false and misleading
6. Conviction, incarceration or indictment by legal authorities

Examination Security

Examinations are highly confidential materials. Any attempts to willfully compromise the integrity of the examination, the examination process or the certification process shall be taken seriously; offenders may be prosecuted to the fullest extent of the law. In addition, any certification credential may be revoked immediately if a breach is proven to have been made by a certified individual.

Appeals of Disciplinary Actions

Candidates, who wish to appeal a certification decision that is made by BPI, must do so in writing.

Appeals Handling

1. Individuals notified of a decision by BPI shall be provided specific reasons for the disciplinary action being taken.
2. Individuals shall submit in writing to BPI, a letter requesting a review of the appeal of the action made by BPI, including specific supporting documentation that substantiates the reason BPI should reconsider their action.
3. As to their request for appeal, BPI shall have a maximum of **30 days** to review the matter internally and respond to the individual with a formal written response.
4. After appealing, individuals that still disagree with the final decision made by BPI may opt to move to arbitration at their own expense.

Candidate Photographs

Candidates must provide to BPI an electronic photograph, of suitable quality, for insertion on the candidate's certification wallet card. Electronic photographs must be labeled with the candidate's name. Non-electronic photographs may be submitted with the candidate's application, prior to the exam, with the exam or after the exam. Candidates who do not have photographs taken at the examination sessions may submit a photograph to BPI directly via email to info@bpi.org. Individual certification credentials shall not be issued until the photographs are received.



Application for BPI Certification

Candidate and employment information is required. **Please fill in all information.** Your application will not be considered unless all information is completed, signed, and dated. An **email address is requested** in order to send up-to-date information in a timely and effective manner.

CANDIDATE INFORMATION

Name: _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone: () _____

Email: _____

EMPLOYER INFORMATION

Business Name: _____

Business Address: _____

City: _____ State: _____ ZIP: _____

Phone: () _____

Email: _____

Website: _____

SEND ALL MY CORRESPONDENCE TO:	Home	Employer
<i>Please check one</i>	<input type="checkbox"/>	<input type="checkbox"/>

Please indicate below each examination that this application covers:

CERTIFICATIONS	100 Question Written Exam*	50 Question Written Exam*	Field Exam
Building Analyst Professional			
Envelope Professional			
Heating Professional			
A/C or Heat Pump Professional			
Manufactured Housing Professional			
Multifamily Building Analyst			
Multifamily Energy Efficient Building Operations			
Multifamily Hydronic Heating System Designer			
Multifamily Advanced Heating Plant Technician			

*100 Question Written Exam is given to first-time candidates; also is given in certain instances to BPI certified professionals with insufficient CEU's. 50 Question Written Exam is given to BPI Certified professionals already holding an active BPI certification, see Small Homes Policies & Procedures.

ADDITIONAL QUESTIONS	Yes	No
Are You HERS Certified?		
Are You NATE Certified?		
Are you a CFR 608?		

Certain information may be released to (please indicate each item applicable below):

AUTHORIZATION TO RELEASE INFORMATION			
	Indicate Name of Each	Yes	No
Employer on Application:			
Affiliate:			
Program Implementer:			
Training Provider:			
Consumer Public*:	N/A	√	N/A

*Authorized with Certification (As Detailed Below)

By earning a BPI credential, I consent to give BPI permission to respond to consumer public queries about my certification status and make available, via a search tool on www.bpi.org, certain information including: Full Name, City/State of Employment, Certification Number, Expiration Dates, and Designations earned. By completing the additional Authorization sections above, I authorize the Building Performance Institute, Inc. to release certain additional information only to those specifically indicated above (not including the consumer public): Pass/Fail Results, Notices of Certification Renewal, and Accumulated Continuing Education Units.

I understand that BPI may, at its discretion, post or remove the consumer public information on www.bpi.org. BPI is not authorized to post or disseminate any other information beyond that stated, such as employer, home address, or telephone number.

The consumer public authorization shall remain in effect as long as BPI maintains records about certification. The special authorization shall remain in effect until BPI receives and acknowledges written notification withdrawing the authorization. The special authorization is completely voluntary and may be withdrawn. BPI does not condition award of your certification on receiving this special authorization. However, some programs may require release of this information in order to process or receive incentives, or for participation in their programs. This is not a BPI requirement.

Credential holders who change their address or employment are responsible for notifying BPI of these changes and verifying the changes have been updated after notice. BPI reserves the right to suspend an individual's certification credential when the holder does not notify BPI of changes.

I certify that all information in this application and the accompanying documentation is true and correct, and I am authorized to obligate the organization to this agreement.

X

Signature **Date**

PLEASE SUBMIT THIS REQUEST BY MAIL, FAX, OR EMAIL

Mail to:	Building Performance Institute, Inc. 107 Hermes Rd., Suite 110 Malta, NY 12020
Fax to:	(518) 899-1622 or toll free (866) 777-1274
Email to:	info@bpi.org

SAMPLE QUESTIONS

The following are samples of the format of written questions that might appear on the BPI examinations.

- 1) Which of the following systems would typically require a blower with a 1200 cfm output?
 - a. 2-ton ac system
 - b. 3-ton ac system
 - c. 5-ton ac system
 - d. 7.5-ton ac system

- 2) Air flows from a 6-inch duct and the duct is restricted to 4-inches. Which of the following would occur?
 - a. The air velocity increases
 - b. The air velocity decreases
 - c. The cubic feet per minute increases
 - d. The cubic feet per minute decreases

- 3) On a typical 120 volt three prong electrical receptacle, the hot wire should be:
 - a. The narrow slot
 - b. The wide slot
 - c. Both the narrow and wide slots
 - d. The round slot

- 4) On startup, a natural gas heating system has “cold air” blowing from the registers. What could be the problem?
 - a. Burner manifold pressure is too high.
 - b. Supply duct runs are too short.
 - c. Blower “ON” delay is set too short.
 - d. Blower “ON” delay is set too long.

BPI CERTIFICATION EXAMINATION DEVELOPMENT & MAINTENANCE PROCESS

Below is a brief overview of the process that BPI uses to develop and maintain its certification credentials. All review and development of the BPI certification examinations has been assisted, in the creation of, by the BPI Technical Committee, which is comprised of Subject Matter Experts from across the country.

Identify Job Designations

- define testing audience
- define test candidates expected competency level
- define test purpose
- define the job designation criteria
- draft preliminary test specifications

Conduct a Job Task Analysis

- identify and document requirements to perform the job designation
- compile into a Knowledge Essential Task List (KETL)

Establish the Test Areas to Be Covered and Method of Examination

- review the draft test specification and make adjustments based on the KETL feedback
- determine the percentage of knowledge and skills to be tested through written examinations, field performance examination or other testing methods

Item Development

- conduct test item writing sessions
- perform a technical, psychometric and language review of each test item

Test Construction and Validation

- conduct pre-tests of examinations
- perform a statistical analysis
- adjust the test scoring parameters based on pre-tests

Test Implementation

- full-scale test availability

Ongoing Job Designation and Test Maintenance

- statistical performance review
- ongoing test item analysis, review, development and strengthening as industry changes
- periodic job task analysis reviewed every 5-7 years
- update Knowledge Essential Task List every 5-7 years

All examinations being conducted by BPI and its Affiliates are to be conducted using BPI developed proctor scripts. The examinations and the test items developed are reviewed by an open, transparent, consensus based Technical Committee. Every reasonable attempt is made to ensure that the examinations and the test items are psychometrically and statistically valid and referenced to appropriate technical standards. This ensures the BPI Certification exams are highly credible and defensible.