



**B**UILDING  
**P**ERFORMANCE  
**I**NSTITUTE, INC.

**BPI Affiliate**

**Policies & Procedures Manual**

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**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](http://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.

**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.

## **Application Steps for BPI Affiliation**

BPI Affiliation is open to any organization that can attest to meeting *all* of the obligations required of a BPI Affiliate. The steps to apply for affiliation are on the BPI website ([www.bpi.org](http://www.bpi.org)), under [Training Affiliates > Become an Affiliate](#).

## **Application Steps for BPI Written Examination Proctors and BPI Field Examiners**

Application for BPI Written Examination Proctors and BPI Field Examiners is open to any individual(s) that can attest to meeting the obligations required of a BPI Written Examination Proctor and/or BPI Field Examiner. Once these steps are completed a formal notice of approval and authorization shall be provided. The following are the steps to apply.

1. Agree to all obligations for proctors and examiners as listed in the section below by completing the self assessment, signing the initial application and submitting the document to BPI for review and approval;
2. Meet the following obligations of BPI Written Examination Proctors and Field Examiners.
  - a. The BPI Written Examination Proctor or BPI Field Examiner shall agree to disclose a contractual or direct employment relationship with a BPI Affiliate(s) whom they shall serve;
  - b. The BPI Written Examination Proctor or BPI Field Examiner shall agree to attest to receipt, review and understanding of the proctor and field examiner script and checklist of requirements on the application/self assessment form;

- c. The BPI Written Examination Proctor or BPI Field Examiner shall agree to sign application form indicating a willingness to conform with these obligations and to assist the BPI Affiliate in conforming with their obligations, as applicable;
- d. The BPI Written Examination Proctor or BPI Field Examiner shall agree that individual(s) applying to conduct field examinations are responsible for initial certification and renewal fees, as applicable and understand that there are no application fees for applying to become a BPI Written Examination Proctor or BPI Field Examiner;
- e. Certification in relevant designations in which a BPI Field Examiner will be conducting examinations must be earned in advance unless working with a BPI Conditional Affiliate to earn requisite certification(s);
- f. Certification is not required for BPI Written Examination Proctors;
- g. BPI Field Examiners shall score not less than 80% on relevant written examinations<sup>1</sup>;
- h. BPI Field Examiners shall score not less than 90% on relevant field examinations<sup>1</sup>;
- i. Written Examination Proctors and BPI Field Examiners shall complete orientation with BPI staff (may be conducted via teleconference).

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<sup>1</sup> Written Examination Proctors and Field Examiners who have previously qualified will retain their status until recertification. Each individual must meet or exceed the new requirements upon recertification in order to remain qualified. This does not require retaking written examinations so long as the certification does not lapse.



## Affiliate Agreement

**THIS AFFILIATE AGREEMENT** (the “Agreement”) is entered into by and between **[enter BPI Affiliate name]**, a [State of Incorporation] corporation with an address and principal place of business at **[enter BPI Affiliate address]** (“Affiliate”), and **Building Performance Institute, Inc.** (“BPI”), a New York not-for-profit corporation, with an address at Saratoga Technology + Energy Park, 107 Hermes Road, Suite 110, Malta, NY 12020 and is effective as of the date this Agreement is signed by BPI as indicated in the signature block below (the “Effective Date”). Affiliate is approved to start providing services on the Effective Date **[if applicable: or [fill in approval date] (the “Approval Date”) whichever is later]**.

**WHEREAS**, Affiliate desires to conduct certain training, refer to nationally recognized BPI standards and protocols, administer BPI examinations, and provide qualified candidates with access to nationally recognized certification and recertification credentials available through BPI, and BPI is willing to provide certain resources and services to the Affiliate.

**NOW THEREFORE**, for good and valuable consideration and in consideration of the mutual covenants and obligations herein, the parties hereto agree as follows:

1. The parties agree to the BPI Affiliate Agreement Standard Terms and Conditions (the “Affiliate Terms and Conditions”) in effect on the Effective Date for the Initial Term and, thereafter, as in effect on the first day of the applicable Renewal Term. BPI’s current Affiliate Terms and Conditions are posted to BPI’s website [www.bpi.org](http://www.bpi.org) and such terms are incorporated herein by reference.
2. For purposes of the Agreement, “Business Locations” will mean the above-listed address and the following business locations of the Affiliate: \_\_\_\_\_
3. Fees payable by Affiliate during the Term of the Agreement (including but not limited to Testing Fees) will be invoiced and payable in accordance with the Affiliate Terms and Conditions.
4. If BPI-related marketing or public relations opportunities arise during the Term of this Agreement, BPI may contact the following person: \_\_\_\_\_ (name) \_\_\_\_\_ (title) \_\_\_\_\_ (email address) \_\_\_\_\_ (telephone number).

**WHEREFORE**, the parties have executed this Agreement as of the Effective Date.

**Building Performance Institute, Inc:**  
**Signed:** \_\_\_\_\_  
**Name:** Jeffrey S. Hiscox  
**Title:** Chief Operating Officer  
**Date:** \_\_\_\_\_

**Affiliate:**  
**Signed:** \_\_\_\_\_  
**Name:** \_\_\_\_\_  
**Title:** \_\_\_\_\_  
**Date:** \_\_\_\_\_

# **BPI Affiliate Agreement Standard Terms and Conditions**

## **1. BPI Services**

1.1 **Affiliate Services.** During the Term of this Agreement, BPI will provide Affiliate with the products and services provided to BPI Affiliates as more particularly described in the Affiliate Services Schedule in effect on the Effective Date of this Agreement and, thereafter, on the first day of any Renewal Term. All such services and products will be provided on a non-exclusive basis. BPI's current Affiliate Services Schedule is posted to BPI's website [www.bpi.org](http://www.bpi.org) and such schedule, as it may be amended from time to time, is incorporated herein by reference.

1.2 **Additional Services.** Upon request, BPI may provide additional consulting or promotional services and/or materials to Affiliate for BPI-related activities. All additional services will be provided on a fee-for-service basis, plus travel, in accordance with a written scope of work signed by both parties. All fees for additional services and products (including estimated reimbursable out-of-pocket expenses) will be pre-paid unless otherwise agreed to by the parties in writing.

1.3 **Confidentiality.** BPI agrees that Affiliate's student lists ("Affiliate Information") will be used only for purposes of exercising its rights and obligations pursuant to this Agreement and will not be disclosed to any third party without prior written consent. BPI agrees to treat Affiliate Information with the same degree of care it accords to its own confidential information. BPI's obligations hereunder will terminate when the BPI can document that such information: (a) was in the public domain at the time it was communicated to BPI by Affiliate; (b) entered the public domain subsequent to the time it was communicated to BPI by Affiliate through no fault of BPI; or (c) was in BPI's possession free of any obligation of confidence at the time it was communicated to BPI by Affiliate, as shown by contemporaneous written records.

## **2. Affiliate Services**

2.1 **Educational Services.** Affiliate agrees to administer written and field examinations in accordance with BPI's then-current Examination Policies and Procedures. BPI's current Examination Policies are posted to BPI's website [www.bpi.org](http://www.bpi.org) and such policies, as they may be amended from time to time, are incorporated herein by reference. Affiliate agrees to discontinue all BPI-related examination services, at its own expense, immediately upon termination or expiration of this Agreement.

2.2 **Promotional Services.** Affiliate agrees to promote BPI certification, accreditation, quality assurance, and standards in communications with candidates and prospective candidates. For this limited purpose, BPI hereby grants Affiliate a limited, non-exclusive, non-transferable license to use BPI Intellectual Property during the Term of this Agreement subject to BPI's then-current Brand Use Policy. Upon termination or expiration of this Agreement, Affiliate will immediately discontinue all use of BPI Intellectual Property and, within five (5) days thereafter, will return any BPI materials (including but not limited to testing and marketing materials) to BPI at Affiliate's expense. BPI's current Brand Use Policy is posted to BPI's website [www.bpi.org](http://www.bpi.org) and such policy, as it may be amended from time to time, is incorporated herein by reference.

## **3. Separation of Training and Examination Activities**

3.1 **Separation of Training and Exam Activities.** The BPI Affiliate shall demonstrate to BPI and candidates how the training it provides is independent of the evaluation and certification of the candidates that are being trained, if the BPI Affiliate carries out written testing and field evaluation activities on behalf of that BPI certification. This is to ensure that confidentiality and impartiality are not compromised so that BPI, as the certification body, can conform to the requirements of ISO-17024: [ISO/IEC 17024:2003(E), Section 4.2.5]

“The certification body shall not offer or provide training, or aid others in the preparation of such services, unless it demonstrates how training is independent of the evaluation and certification of persons to ensure that confidentiality and impartiality are not compromised.”

3.2 BPI shall not provide training to candidates in preparation for certification, to maintain a clear separation of training and examination activities in accordance with ISO-17204 requirements.

#### **4. Affiliate Duties**

4.1 **Insurance Requirements.** Affiliate has obtained and agrees to maintain the following minimum insurance coverage throughout the Term of this Agreement: (a) general liability insurance that meets the local jurisdictional requirements or \$1 million, whichever is greater; and (b) workers’ compensation insurance that meets jurisdictional requirements. On or before the Effective Date, Affiliate will name BPI as a certificate holder under its general liability insurance policy and agrees to submit proof of the requisite insurance coverage periodically upon request.

4.2 **Business Locations.** Affiliate represents and warrants that all Business Locations will satisfy the Business Location Guidelines throughout the Term of this Agreement. BPI’s current Guidelines are posted to BPI’s website [www.bpi.org](http://www.bpi.org) and such Guidelines, as they may be amended from time to time, are incorporated herein by reference. Additional Business Locations may be added only through an amendment to this Agreement and, in such an event, additional fees may apply. Affiliate is responsible for all costs associated with use of Business Locations.

4.3 **Payment Terms.** BPI will issue invoices to the Affiliate for fees due and payable pursuant to this Agreement. Affiliate agrees to pay all such fees within thirty (30) days after receipt of an invoice. BPI’s current Fee Schedule and Return Policy are posted to BPI’s website [www.bpi.org](http://www.bpi.org) and are, as they may be amended from time to time, incorporated herein by reference. Affiliate is solely responsible for payment of all state, local or federal taxes, however designated, levied on any fees payable to BPI pursuant to this Agreement. Upon termination or expiration of this Agreement, BPI agrees to issue a final invoice to Affiliate as soon as practicable and Affiliate agrees to pay such final invoice within thirty (30) days thereafter. BPI invoices are payable upon presentation, and amounts remaining overdue for more than thirty (30) days will be subject to an interest charge of 1.5 percent per month from the date of the invoice, or the highest rate permissible by law, whichever is less. If the Affiliate objects to any portion of an invoice, the Affiliate will notify BPI of its objection within ten (10) days of the date of the invoice, and the parties will promptly make a good faith effort to settle the disputed portion of the invoice. No interest will accrue on such disputed portion of the invoice until the dispute is resolved. The Affiliate will in any event pay the portion of the invoice that is not in dispute within such thirty (30) day period. BPI reserves the right to suspend or terminate services if Affiliate invoices are not timely paid, in which event BPI will not be liable for any resulting loss, damage or expense connected with such suspension or termination. The remedies provided for in this section are in addition to, and not in lieu of, any other rights or remedies available to BPI at law or in equity."

4.4 **Non-Compete.** During the Term of this Agreement and for a period of two (2) years thereafter, Affiliate will not directly or indirectly engage in the development or delivery of certification, accreditation, or quality assurance services that compete with products and services offered by BPI without first obtaining written consent from BPI, which consent may be granted or withheld in BPI’s reasonable discretion.

4.5 **Examination Materials.** Affiliate understands and agrees that, as between BPI and Affiliate, BPI will retain full and complete ownership of all copyrighted materials provided by BPI to be used in the certification examination process (“BPI Materials”). Affiliate is hereby granted a right and license to use the BPI Materials for the sole purpose of conducting certification examinations. Any unauthorized use of these materials is prohibited and will be deemed a material breach of the Agreement. All BPI Materials will be returned to BPI immediately upon termination or expiration of this Agreement. BPI will have the right to seek injunctive relief to prevent any unauthorized use or threatened use of the BPI Materials.

4.6 **Certification Authority.** Affiliate understands and agrees that BPI has the sole authority to award, revoke, or change the conditions of certification as the authorizing certification body.

**5. Term and Termination** This Agreement will commence on the Effective Date and continue for a period of one (1) year (the “Initial Term”). The Agreement will renew automatically for successive one (1) year periods (each a “Renewal Term”) unless either party notifies the other in writing of its desire not to renew at least sixty (60) days prior to the end of the then-current Term. BPI may terminate this Agreement upon ten (10) days prior written notice if: (1) Affiliate breaches a material provision of this Agreement and fails to cure such breach within thirty (30) days after receiving written notice thereof. For purposes of this Agreement and without limitation, Affiliate’s failure to timely pay BPI invoices for two (2) or more consecutive billing cycles will be deemed a material breach of this Agreement. This Agreement will automatically terminate in the event that Affiliate ceases to conduct business in the normal course, makes an assignment for the benefit of its creditors or becomes a party to any judicial or administrative proceeding in bankruptcy, receivership, or reorganization for the benefit of its creditors.

**6. Representations and Warranties** Affiliate represents and warrants that:

a. Affiliate, its employees, agents and independent contractors, will abide by BPI’s policies and procedures that are referenced in this Agreement and will protect the confidentiality and integrity of the BPI examination process including but not limited to safeguarding passwords, logins, and other written and electronic testing materials before, during and after the examination period.

b. All individuals performing services on behalf of Affiliate will be experienced and qualified

c. Affiliate will provide all services and undertake to perform all obligations hereunder in a manner consistent with the best-of-industry standards established by BPI.

d. Affiliate will immediately report to BPI any known violations of this Agreement that will or could affect the integrity of the Affiliate’s BPI-related program(s).

e. Affiliate has and will maintain all licenses, certificates and insurance (including workers’ compensation and general liability) that are required by law for Affiliate to carry on its business and perform its obligations under this Agreement.

f. Any materials submitted by Affiliate for BPI review will not infringe upon or violate any third party intellectual property rights.

g. That Affiliate’s execution and delivery of this Agreement and the performance of Affiliate’s obligations hereunder do not conflict with or violate any requirement of applicable law and do not conflict with, violate, breach, constitute a default, or require any consent under any contractual obligation or court or administrative order by which Affiliate is bound.

h. That candidate certification information will be treated as strictly confidential and will not be released to any third party unless and until Affiliate has received written consent from the candidate.

i. That Affiliate does not and will not discriminate against on the basis of race, color, creed, national origin, gender, sexual orientation, religion, age, disability, or other legally protected status, in admission to, access to, or operations of its programs, services, or activities or with respect to hiring decisions. No person will, 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 programs or activities provided for in this Agreement.

**7. Disclaimer of Warranty EXCEPT AS OTHERWISE EXPRESSLY PROVIDED FOR HEREIN, BPI MAKES NO WARRANTIES, EXPRESS OR IMPLIED, AS TO ANY MATTER WHATSOEVER INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.**

**8. Limitation of Liability** The aggregate liability of BPI under this Agreement to Affiliate will not exceed the total payments actually received by BPI from the Affiliate under this Agreement for the Term during which the alleged liability accrued. Unless otherwise specifically provided for herein, neither party will be liable for any special, incidental, indirect, or consequential damages under this Agreement, however caused, even if such party is advised of the possibility of such damages in writing.

**9. Indemnification** To the fullest extent permitted by law, Affiliate will defend, indemnify, and hold harmless BPI, its officers, directors, agents, and employees (“BPI Parties”), from and against any and all third party claims, demands, actions, suits, liabilities, costs or expenses (including attorneys’ fees) of claims arising, directly or indirectly, out of Affiliate’s negligence, intentional misconduct or breach of this Agreement including but not limited the breach of any representations or warranties herein.

**10. Terms Confidential** The parties agree that the terms of this Agreement are confidential and will not be disclosed to any third party without prior written consent, which consent may not be unreasonably withheld.

**11. Third Party Beneficiaries** This Agreement will not inure to the benefit of any person or entity that is not a party to the Agreement.

**12. Good Faith** The parties will attempt, in good faith, to quickly and efficiently resolve any disputes between the parties.

**13. Relationship of Parties** Nothing contained herein will be construed to create a partnership, joint venture, or agency relationship between BPI and Affiliate. In no event will either party have the authority to enter into an agreement or undertake an obligation on behalf of the other party.

**14. Assignment** Neither party may assign this Agreement or any of its rights or obligations hereunder to any third party without first obtaining the written consent of the other party which consent will not be unreasonably withheld.

**15. Severability** In the event that a provision of this Agreement is determined by a court with jurisdiction to be unenforceable or invalid, this Agreement will not be rendered unenforceable or invalid as a whole, rather, in such event, the subject provision will be changed and interpreted so as to best accomplish the objectives of the parties within the limits of applicable law.

**16. Electronic Communications** The parties understand and agree that one of the primary means of communication between the parties will be through electronic mail. To that end, each party agrees to: (a) maintain the capability to transmit and receive electronic mail and to view information through the Internet; (b) consistently monitor electronic mail received from the other party; (c) inform the other party of changes in electronic mail addresses for personnel assigned to work on BPI-related projects; and (d) maintain an appropriate level of security with respect to electronic communications. Affiliate expressly understands and acknowledges that BPI policies and procedures will be updated periodically throughout the Term of this Agreement and Affiliate agrees that posting such revised policies to BPI’s website [www.bpi.org](http://www.bpi.org) is sufficient notice to Affiliate of the revisions. BPI will use reasonable efforts to provide Affiliate with periodic updates on relevant changes to policies and procedures through electronic mail or periodic newsletters. Notice of any changes to the Affiliate Terms and Conditions will be provided pursuant to Section 16 (Notices).

**17. Notices** Except as otherwise specifically provided herein, whenever notice is required or permitted, such notice will be provided in writing and will be deemed given when delivered by hand or three (3) business

days after the date mailed by United States mail, certified mail, return receipt requested, postage prepaid, and addressed to the parties at the addresses set forth in the Agreement. Notice may also be given by electronic mail or telefacsimile but will be deemed delivered only upon receipt of a non-automated communication from the recipient acknowledging receipt. Either party may change its address for notification purposes upon prior written notice.

**18. Force Majeure** Neither party will be liable to the other for any delay or failure to perform due to causes beyond its reasonable control, including but not limited to power or telecommunications shutdowns, strikes, shortages, government orders or acts of God. Performance times will be considered extended for a period of time equivalent to the time lost because of any such delay.

**19. Amendments** Except as otherwise specifically provided for herein, no amendment or modification of the Agreement will be binding unless in writing and signed by both parties.

**20. No Waiver** No custom, practice or failure of either party to exercise any right granted or to insist upon strict compliance with obligations hereunder will constitute a waiver of that party's right to exercise any such right or to demand strict compliance.

**21. Survival** All provisions of this Agreement relating to non-competition, confidentiality, intellectual property rights and indemnification will survive the termination or expiration of this Agreement for a period of two (2) years. Payment provisions of this Agreement will survive the termination or expiration of this Agreement to the extent necessary to carry out the intentions of the parties.

**22. Section Headings** The section headings in this Agreement are included for convenience of reference only and will not be deemed to define, limit, or otherwise affect the construction of any provision contained in this Agreement.

**23. Counterparts** This Agreement may be executed in any number of counterparts and either party may execute any such counterpart, each of which when executed and delivered will be deemed to be an original and all of which taken together constitute one and the same instrument. This Agreement will become binding when one or more counterparts taken together have been executed and delivered by all parties.

**24. Governing Law and Venue** This Agreement will be governed and construed in accordance with the internal laws of the State of New York, without regard to its principles of conflicts of law. Venue of any action arising hereunder will rest exclusively in the State of New York, County of Saratoga.

**25. Entire Agreement** The Agreement supersedes all prior and contemporaneous representations, understandings or agreements between the parties, whether oral or written, and constitutes the entire agreement between the parties relating to the subject matter hereof.

## Affiliate Application

Please fill in all information. Your application will not be considered unless all information is complete, signed and dated. An email address is requested in order to receive the most up to date information in a timely and effective manner from BPI.

Affiliate Business Information		
Legal Business Name:		
Business Address (No P.O. Box):		
Business City:	State:	Zip Code:
Business Phone:	Fax:	
Email:	Web Site:	
Primary Contact Name:		
Phone:	Email:	
Billing Contact and Address:		

Self Assessment			
1. Do you understand all of the affiliate services and duties for BPI affiliation?	Yes	No	N/A
2. Do you have internal staff qualified to conduct online exams?	Yes	No	N/A
3. Do you have internal staff qualified to conduct field exams?	Yes	No	N/A
4. Will you outsource any written or field exams?	Yes	No	N/A
5. Have you received/reviewed the procedures for online exams?	Yes	No	N/A
6. Have you received/reviewed the procedures for field exams?	Yes	No	N/A
7. Do you want your affiliate information on the BPI Web site?	Yes	No	N/A
8. Do you have access to proper online exam facilities?	Yes	No	N/A
9. Do you have access to proper field/lab exam facilities?	Yes	No	N/A
10. Do you have access to building performance test equipment?	Yes	No	N/A

Please indicate all examination types that you would like to offer:				
<input type="checkbox"/> Building Analyst	<input type="checkbox"/> Envelope	<input type="checkbox"/> Heating	<input type="checkbox"/> A/C and Heat Pump	<input type="checkbox"/> Manufactured Housing
<input type="checkbox"/> Multifamily Building Analyst	<input type="checkbox"/> Multifamily Energy Efficient Building Operations	<input type="checkbox"/> Multifamily Hydronic Heating System Designer	<input type="checkbox"/> Whole House Air Leakage Control Installer (WH-ALC)	<input type="checkbox"/> Whole House Air Leakage Control Installer-Crew Chief (WH-ALC-CC)

Please submit this request with applicable fees and supporting documents to:		
<p style="text-align: center;"><b>Standard U.S. Mail:</b>                  Building Performance Institute, Inc.                  107 Hermes Rd., Suite 110                  Malta, NY 12020                  Attention: Affiliation Application</p>	<p><b>Email or online:</b>  <a href="mailto:affiliation@bpi.org" style="color: blue; text-decoration: underline;">affiliation@bpi.org</a></p>	<p><b>Fax:</b>  <b>518-899-1622</b>                  or  <b>1-866-777-1BPI</b></p>

I certify that all information included in this application and the accompanying documentation is true and correct.

Signature	Job Title	Date
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## BPI Proctor Application

Online and Field Proctors must submit the *Proctor Application* and *Code of Ethics* listing the affiliate(s) for which they will test, along with a JPG color photo for their proctor ID card. Online Proctors must participate in a webinar orientation with BPI staff prior to offering exams. Field proctors must be certified in the same designation(s) of the exam(s) that they administer, participate in a webinar orientation with BPI staff, and complete a site visit orientation with BPI staff prior to offering tests.

Please read all documents and fill in all information. Your application will not be considered unless all information is complete, all forms are signed and dated, and a *brief biography/resume that lists your qualifications in relation to building science* has been submitted. An email address is required in order to receive the most up-to-date information in a timely and effective manner from BPI.

<b>Proctor Information - If you have a BPI ID, you must list it here:</b>				
Application for:	Online Proctor	Field & Online Proctor		
First Name:		Last Name:		
Home Address:				
City:	State:	Zip Code:	Country:	
Phone:		Fax:		
Email:		Cell Phone:		

*All correspondence will be sent to a proctor's home address.*

<b>Employer/Company Information:</b>		
Business Name:		
Title:		
Business Address:		
Business City:	State:	Zip Code:
Business Phone:		Business Fax:
Email:		Website:

**Please list the affiliate(s) for which you will provide services:** \_\_\_\_\_  
 \_\_\_\_\_

<b>Please read and initial the following that apply:</b>	<b>Initials:</b>
1. I have read and understand the proctor procedures for online exams.	
2. I have read and understand the proctor procedures for field exams.	
3. I agree to participate in all required orientations.	
4. I give BPI permission to notify the affiliates I test for of my certification expirations.	

<b>Please indicate all certification(s) you currently hold:</b>				
<input type="checkbox"/> Building Analyst	<input type="checkbox"/> Envelope	<input type="checkbox"/> Heating	<input type="checkbox"/> A/C & Heat Pump	<input type="checkbox"/> Manufactured Housing
<input type="checkbox"/> Multifamily Building Analyst	<input type="checkbox"/> Multifamily Energy Efficient Building Operator (MF BO)	<input type="checkbox"/> Multifamily Hydronic Heating System Designer (MF HH)	<input type="checkbox"/> Whole House Air Leakage Control Installer (WH-ALC)	<input type="checkbox"/> Whole House Air Leakage Control Installer-Crew Chief (WH-ALC-CC)

I certify that all information included in this application and the accompanying documentation is true and correct.

\_\_\_\_\_  
 Signature Date

## BPI Code of Ethics

The Building Performance Institute and its Affiliate Organizations are committed to promoting the highest level of professionalism, integrity, and ability available in the residential contracting certification industry.

This code of professional ethics and conduct for BPI trainers and proctors (heretofore referred to as “Representatives”) is designed to foster trust and mutual respect among those working in the industry as well as the public at large. It is not intended to discourage fair and healthy competition within the industry, but to increase the esteem of the credentials and the individuals who have earned them. We consider industry relationships critical to the industry’s success.

Minimum standards of conduct in these areas are contained herein:

1. **Guiding Principles** – Each Representative shall strive to uphold, practice, teach, and endorse BPI’s Guiding Principles for Building Performance Contractors:
  - a. *Do no harm to occupants, workers, or houses*
  - b. *Identify and resolve potential health and safety issues*
  - c. *Recommend cost-effective home improvements*
  - d. *Install measures effectively and safely*
  - e. *Test in and test out*
  - f. *Consider the worst-case scenario*
  - g. *Apply “house as a system” principles*
  - h. *Document your work*
2. **Professionalism** – Each Representative of BPI shall conduct business in a manner displaying the highest degree of professional behavior. Representatives shall speak truthfully and act in accordance with accepted principles of honesty and integrity. Representatives shall endeavor to understand and fairly represent their individual scope of knowledge and ability to perform services.
3. **Responsibility to Candidates** – Each Representative shall diligently and honestly pursue the legitimate objectives of the training and certification process. No Representative shall place his or her own needs and desires above those of the candidate in the performance of services for the candidate. National, State or Provincial, and Local (Municipal) laws as well as regulations, codes, and ordinances shall be strictly adhered to in the performance of training and certification activities. Each candidate shall be treated fairly and consistently and afforded the same opportunities as all other candidates.
4. **Integrity of Training and Testing** –
  - a. Trainers shall strive to uphold the integrity of the certification process by providing each student with comprehensive training for each skill required for the relevant job designation. Trainers may not utilize any prior knowledge of the examination content or structure to adjust or edit the content of the training subject matter. “Training to the test” is expressly prohibited.
  - b. Proctors shall remain impartial during the course of both the written and performance examination and may not coach or lead the candidate. Examination periods may not be used as training opportunities.
5. **Confidentiality** – Each Representative shall maintain as confidential each candidate’s personal documentation and examination results. Candidate names and contact information may not be distributed to outside vendors or agencies without the express written permission of the candidate. Each Representative shall uphold the confidentiality of all BPI examination materials including written examinations, performance examination score sheets, and proctor guidelines and instruction manuals.

Proctors shall comply with all security procedures related to administration and handling of written exams as identified in the Proctor Guidelines.

- 6. **Fair Dealing** – Each Representative shall endeavor to deal fairly with his or her clients, contractors, competitors, vendors, employer, and employees. No Representative shall take unfair advantage of anyone through manipulation, concealment, abuse of privileged information, misrepresentation of material facts, or any other unfair dealing practice.
- 7. **Continuing Education** – Each Representative shall endeavor to remain knowledgeable in the subject material of his or her designation by taking courses and seminars, reading industry periodicals, and consulting and sharing information within the industry network in the individual’s area. Representatives shall maintain current BPI certification in the job areas they perform work in.
- 8. **Compliance with Laws** – Each Representative shall comply with all National, State and Provincial, and Local (Municipal) laws and regulations, as well as any human rights statutes concerning training, proctoring of examinations, and oversight of contracting work related to BPI certification activities.

**BPI Trainer/Proctor Code of Ethics Agreement**

I have received a copy of the BPI Code of Ethics for Trainers and Proctors and have fully reviewed the articles contained therein. Furthermore, I have read all associated Proctor documents and I understand and agree to comply as appropriate. I agree to comply with the requirements set forth in the BPI Code of Ethics for Trainers and Proctors when engaging in BPI related training and/or certification activities.

- I would like my name to be added to the BPI Technical Committee. I understand that participation on the BPI Technical Committee is strictly voluntary and I may request to be removed from this list at any time.
- I do not wish to participate in the BPI Technical Committee at this time.

Print Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Affiliated Organization:  
\_\_\_\_\_

## Exam Session Request Form

Please fill in all information. Your application may not be considered unless all information is complete, signed and dated. An email address is required in order to receive confirmation about your order from BPI.

Affiliate and Proctor Information	
Affiliate Name:	Affiliate ID Number:
Contact for Session:	
Phone:	Email:
Written (Paper) Test Proctor:	Proctor ID Number:

Written Exam Session Information		
Written Exam Date:	Public Session	Private Session
Written Exam Location:		
Address:		
City:	State:	Zip Code:
Ship Written Exams to:	Affiliate HQ	Written Exam Location Above

Please indicate the required quantity of each exam type needed (paper exams only)					
	Building Analyst	Envelope	Heating	A/C and Heat Pump	Manufactured Housing
Written (50)					
Written (100)					
	Multifamily Building Analyst	Multifamily Energy Efficient Building Operations			
Written (75)					

\*The Multifamily Building Analyst Practical exam *must* be taken online; a paper exam is not available.

Please submit this request with applicable fees and supporting documents to:		
<b>Standard U.S. Mail:</b> Building Performance Institute, Inc. 107 Hermes Rd., Suite 110 Malta, NY 12020 Attention: Exam Session Request Form	<b>Email or Online:</b> <a href="mailto:testing@bpi.org" style="color: blue; text-decoration: underline;">testing@bpi.org</a>	<b>Fax:</b> 518-899-1622 or 1-866-777-1BPI

I certify that all information included in this application and the accompanying documentation is true and correct.

Signature \_\_\_\_\_

Date \_\_\_\_\_



# 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 (\*If self-employed, this section still needs to be completed.)

Business Name: \_\_\_\_\_

Business Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: (    ) \_\_\_\_\_

Email: \_\_\_\_\_

Website: \_\_\_\_\_

Please indicate below each examination that this application covers:

Certifications	100 Question Online Exam*	50 Question Online Exam*	Field Exam
Building Analyst Professional			
Envelope Professional			
Heating Professional			
A/C or Heat Pump Professional			
Manufactured Housing Professional			

\*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.

Multifamily Certifications	75 Question Online Exam	Field Exam
Multifamily Building Analyst		
Multifamily Energy Efficient Building Operations		

Air Sealing Installer Certifications	Field Exam
Residential Building Envelope Accessible Areas Air Leakage Control Installer	
Residential Building Envelope Whole House Air Leakage Control Installer	
Residential Building Envelope Whole House Air Leakage Control Crew Chief Installer	

All Air Sealing Installer Certifications listed above require only a field exam.

Additional Questions	Yes	No	ID#
Are You HERS Certified?			
Are You NATE Certified?			
Are you a CFR 608?			

If yes, you must submit proof with the application.

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](http://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.

**OPT OUT: Certified Professionals will have their company name, city, state, telephone number, and email address listed on the BPI website unless this box is checked. If you do not complete the Employer Information section on the front page of this application, your listing will not appear.**

I understand that BPI may, at its discretion, post or remove the consumer public information on [www.bpi.org](http://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.**

The proctor for your field exam may be subject to a Quality Assurance visit by either a BPI staff member onsite or a video recorded exam session to ensure BPI policies and ANSI/ISO requirements are met and testing remains equitable. This evaluation is of the proctor, not the test taker, and will not interfere with your exam. BPI conducts these visits to the benefit of both the test taker and the proctor.

I certify that all information in this application and the accompanying documentation is true and correct.

**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:	<a href="mailto:info@bpi.org">info@bpi.org</a>