



Crew Leader

CERTIFICATION SCHEME HANDBOOK



Notice

Anyone interested in becoming BPI certified as an Crew Leader, will need to know the scope of the certification and all requirements.

This certification scheme handbook outlines the knowledge, skills and abilities needed for individuals to be certified as an Crew Leader.

Information in this scheme handbook represents the policies at the date of publication for the BPI Crew Leader certification. Information in this scheme handbook supersedes information contained in any previous published documents.

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Acknowledgements

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Disclaimer

Eligibility standards, exam content, exam standards, fees, and guidelines are subject to change. BPI will keep the most up-to-date version of this document posted at www.bpi.org. Prior to participating in any available service through BPI, check to ensure that you have based your decision to proceed on the most up-to-date information available. BPI reserves the right to modify documents prior to accepting any application.

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1. About BPI

Founded in 1993, the Building Performance Institute (BPI) is the nation's premier certification and standard-setting organization for home performance professionals. BPI is accredited by the American National Standards Institute, Inc. (ANSI) as a developer of American National Standards and as a certifying body for personnel credentials. BPI develops the technical standards for home energy audits and for energy efficiency, health, and safety improvements. From these standards, BPI develops rigorous online and field exams resulting in one of BPI's 14 professional certifications. BPI understands the importance of impartiality in carrying out its certification activities, manages conflict of interest, and ensures the objectivity of its certification activities.

BPI also offers 3 programs ([BPI GoldStar Contractor](#) for companies, [Rating Program](#) for raters, and [BPI Product Listing](#) for manufacturers) and one certificate ([Building Science Principles](#)). BPI Certified Professionals hold over 18,000 active certifications supported by 130 BPI Test Centers and 340 Proctors. BPI has BPI Goldstar Contractors across the country.

BPI is a 501(c)3 corporation registered in the state of New York. The corporation was incorporated on January 18, 1996 and the corporation number is 14-1789014. The objective of the corporation is to provide credentialing for individuals and corporations involved in the residential retrofit industry. BPI is headquartered in Malta, NY.

2. BPI Certification Schemes

BPI offers individual certification in a number of areas in the residential retrofit industry.

The certification schemes are developed and then reviewed on an on-going basis by scheme committees made up of subject matter experts – individuals with the credentials and experience within the industry. The scheme committee review statistics, industry changes and current certification scheme requirements on a regular basis.

Industry input on each certification scheme is encouraged. The scheme committee members will seek input from external sources including, but not limited to:

- industry associations
- professional groups
- government agencies
- consumer/owner advocacy groups

The certification outlined in this scheme handbook is for Crew Leaders who are involved in the retrofit of existing residential buildings. For a full listing of certifications, see the www.bpi.org website.

For individuals to become BPI CL certified, successful completion of a multiple-choice exam to confirm the candidate's knowledge and skills and a two-part practicum evaluation is required to confirm the candidate's abilities.

To be certified by BPI, the candidate is not required by BPI to undergo any specific training, whether that would be on-site job training or classroom training, however, prerequisite criteria must be met. BPI does not approve any training programs. It is up to the individual to decide what training they want to

take and where to take it, as it is solely their decision.

The requirements for this certification will be reviewed every five years and modified as required by the scheme committee with input from the residential retrofit industry. Modifications to the certification scheme will be made by BPI on the basis of the non-compliance cases, feedback from industry and technical changes to materials, components, systems, building codes or other relevant items.

3. Outline of the Crew Leader Certification

This certification scheme handbook outlines the knowledge, skills and abilities requirements for the Crew Leader certification.

The scheme defines the scope of the Crew Leader certification as the following; A crew leader is a residential energy efficiency professional who is responsible for supervising the retrofitting activities specified in the scope of work. A committee of subject matter experts (SMEs) considered to be experts in the field created the Crew Leader Job Task Analysis (JTA).

This document is intended to include all of the tasks a crew leader may perform, as well as the knowledge, skills, and abilities required to do these tasks.

Please note that certification is not a license to practice. All certified persons must comply with applicable federal, state and local laws and regulations governing the profession.

4. Preparing for Certification

There are prerequisites to take the exams that, if successful, will lead to certification. Before you register for the exam:

- Download the latest version of the CL scheme handbook from www.bpi.org
- Read and understand all information contained in the BPI CL scheme handbook
- Refer to the Functions & Tasks section contained in the CL sheme handbook to be sure that you understand and can perform the tasks required for this certification
- Obtain reference materials for the multiple-choice and/or field exams and study well in advance of taking the exam
- Download the *BPI Application for Crew Leader Certification* from www.bpi.org and submit to HEPCertification@bpi.org. *Application processing could take several weeks before a candidate will receive an approval letter to take the exam. It is recommended that a candidate submit their application at least thirty (30) days prior to the scheduled exam date. Please do NOT schedule your exam date(s) until you receive your approval letter from BPI.*

4.1 Prerequisites

All items below are required prior to taking the multiple-choice and/or field certification exams:

- Education: GED/high school diploma OR equivalent education from another country, OR
 - state career readiness certificate (with a minimum score of 3 in each work key), OR
 - additional industry specific experience as explained below.
- Must have OSHA 30 certification

- Industry specific experience [i.e., work in the Weatherization Assistance Program (WAP), building performance, or building science industries]
 - 4,000 hours **or**
 - 2,000 hours if you pass the BPI Retrofit Installer Technician certification with a minimum of a 1,000 hours as a certified BPI Retrofit Installer Technician **AND**;
 - if you do not have the education prerequisite requirement above, 1,000 additional hours must be in a home performance program funded by a state, utility or other agency with specific compliance standards. A letter must be provided by the employer in that program verifying the use of compliance standards and your competency on the job.
- Building science coursework for 100 hours that is mapped back to the established Job Task Analysis (JTA - training whose content can be matched against and aligned with the content of the JTA for the certification)

You must obtain a minimum of **15 points** from any combination of activities below:

- Building experience (general maintenance, framing, roofing, drywall, siding, etc.); **maximum of 10 points**
 - **5 points** for each 1,000 hours
- Relevant building science coursework / training; **maximum of 10 points**
 - **5 points** for every 50 hours
- Industry certifications (RESNET, BPI, NATE, EPA) other certifications also considered; **maximum of 10 points**
 - **5 points** per certification

Candidates for certification must bring the approval letter sent by BPI to the Test Center where the exams will be administered as proof of meeting the prerequisite criteria. **Candidates will not be permitted to take any exam(s) without providing the approval letter to the Test Center.**

4.2 Special Testing Accommodations

Candidates in need of special testing accommodations, such as a language barrier, or arrangements for persons with disabilities, should submit the appropriate forms as noted in Appendix (D and E).

It is highly recommended that you submit your request for accommodation at least 30 days prior to your preferred exam date.

4.3 Proof of Identity

Candidates must provide valid photo identification prior to taking the exam. Please make sure that when registering for the exam, the name used is the same that is listed on the valid photo ID.

Examples of acceptable forms of photo ID are:

- driver's license
- passport
- military identification
- employee identification card

4.4 Certification Fees and Scheduling

BPI certification exams are provided through BPI Test Centers. Please reach out to a local BPI Test Center for fees and scheduling details of exams, as they will vary from Test Center to Test Center. To locate a BPI Test Center, please go to the BPI website (www.bpi.org) and select **Locator** from the top of the page.

4.5 Field Testing Environment

In order to ensure fairness in testing each field exams must be conducted at a site that incorporates the minimum criteria listed below. Field exams conducted at a site that does not meet these minimum criteria will be void. While it is the proctor's responsibility to find a suitable site, the candidate should also be aware of these requirements to avoid potential testing issues.

- At minimum one atmospherically vented combustion appliance
- A test site capable of supporting blower door testing and diagnostics
- A ducted distribution system
- Must have a bathroom exhaust fan
- Must NOT be a potentially hazardous environment (including but not limited to asbestos – like material, mold and mildew in excess of 10 square feet of surface area, etc)

Please be aware that during the performance exam the proctor may ask questions in relation to line items on the field exam form for clarification purposes only. Proctors should not be asking any other type of questions, and are NOT permitted to ask questions unrelated to, or above and beyond the scope of the line items on the field exam form. If a candidate feels that they were asked questions that were inappropriate, please complete the [Complaint Form](#) located at www.bpi.org.

5. Multiple-choice Exams

For the Crew Leader certification, a multiple-choice test instrument will be administered in order to ensure competency in the critical tasks defined by BPI.

The multiple-choice exam is comprised of one hundred (100) questions to cover knowledge and skills and will be timed at two (2) hours (2 hrs). The multiple-choice exam consists of multiple versions, each determined to have its own minimum passing score through psychometric analysis and the Modified Angoff standard-setting procedure. The results page during the online exam session will indicate whether a candidate was successful or not based on the version they were administered.

Candidates may challenge the CL online exam up to six (6) times in a one-year period. The one-year period begins after the first unsuccessful attempt of the exam, after which time a candidate will have five (5) more attempts to successfully challenge the exam. There is a cost for each exam. BPI permits twelve (12) months to complete the certification process from the time a candidate takes the first exam. Candidates who do not complete the certification process within the one-year period must retake both the online and field exams.

This exam is a closed-book exam with the exception of BPI Standards, which are available online via the testing site at the time of the exam (no marked copies of the standards will be permitted during the

multiple-choice exam). Any papers used to take notes, create diagrams, or record diagnostic results (scrap paper) may not leave the testing environment. All papers must be handed to the proctor to be destroyed.

Future discussion or disclosure of the content of the exam, orally or in writing, or by any other means, is prohibited. Theft or attempted theft of exam items is punishable to the fullest extent of the law. Candidates will be observed at all times by a BPI approved Proctor while taking the exam. This includes direct observation by the BPI approved Proctor, as well as audio and video recording of the exam. The participation in irregular behavior during the exam may result in the invalidation of the results of the exam, termination of status, civil liability, criminal prosecution, or other appropriate sanctions.

6. Practicum (Field) Evaluation (Abilities)

A practical evaluation to determine the candidates' abilities has been developed by BPI in order to ensure competency in the critical tasks defined by BPI. This will provide documented evidence that the candidates have the appropriate abilities.

The practicum evaluation exam is constructed where candidates are requested to perform a task. Their abilities are then evaluated based on a predetermined set of criteria.

The candidates will follow the outline in the functions and tasks section in this document.

The practicum evaluation exam consists of two (2) components resulting in a combined score; a field section and a thirty-five (35) question multiple-choice computer based exam. The field component includes three (3) distinct props that candidates will complete work on. Two (2) of the props will be depressurized by approximately 75 Pa by the proctor. These depressurized props are single attempt only and any sign of smoke movement within the prop will indicate a failure on the prop, however, not necessarily on the entire exam. Candidates will also be required to perform diagnostic testing as outlined in the exam blueprint.

The time limit for the multiple-choice computer based portion of the practicum exam is 1 hour (1hr). This exam is closed-book.

The time limit for the field portion of the practicum exam is three (3) hours and thirty (30) minutes (3 1/2 hrs). This exam is an open-book exam (the only reference not permitted is assistance). Any papers used to take notes, create diagrams, or record diagnostic results (scrap paper) may not leave the testing environment. All papers must be handed to the proctor to be destroyed.

The combined passing score for the combined practicum evaluation exam components as described above is 78%.

Candidates may challenge the CL field exam up to six (6) times in a one-year period. The one-year period begins after the first unsuccessful attempt of the exam, after which time a candidate will have five (5) more attempts to successfully challenge the exam. There is a cost for each exam. BPI permits twelve (12) months to complete the certification process from the time a candidate takes the first exam. Candidates who do not complete the certification process within the one-year period must retake both the online and field exams.

The practicum evaluation is administered through BPI Test Centers at various locations across the United States. Please go to the BPI website (www.bpi.org) and select **Locator** at the top of the page to find a BPI Test Center near you.

7. Functions and Tasks

The Knowledge, Skills, and Abilities required for this exam are below.

- Knowledge, typically shown on online or verbal exam
- Skill, typically shown on online exam, diagram, or interactive tool
- Ability, typically demonstrated on prop or in house

SAFE WORK PRACTICE SKILLS	
Knowledge of:	
•	U.S. Department of Energy (DOE) program regulations/policy and Environmental Protection Agency (EPA) guidelines for asbestos, lead, mold, and other health hazards
•	Material Safety Data Sheets
•	Occupational Safety and Health Act (OSHA) standards
•	Ladder safety
•	Fall protection
•	Personal protective equipment
•	Respiratory protection
•	Safe motor vehicle operation
•	Power-operated tools and machinery used on the job site
•	Fire prevention
•	Permit-required confined spaces
•	OSHA 30 Construction Safety Outreach Training
•	Other worker-related OSHA standards (e.g. scaffolding, aerial lifts)
Demonstrate the ability to:	
•	Select and use the appropriate Personal Protection Equipment for a particular task
•	Safely use basic hand and power tools
•	Use a basic first aid kit to treat common job-site injuries
•	Work lead safe
•	Identify serious mold conditions
•	Assess work area safety hazards
•	Use CPR, first aid and AED as required
GENERAL KNOWLEDGE, SKILLS AND ABILITIES	
Knowledge of:	
•	Federal, state and local codes, regulations and requirements
•	Building science (e.g. heat, moisture, pressure flow; ventilation; thermal and pressure boundary)
•	Building techniques and terminology (e.g. critical junctures, flooring systems, crawl spaces, roof framing, mechanical systems)
•	Building materials (e.g. dry wall, insulation, house wrap, windows)
•	Retrofit techniques (e.g. air tightening, duct sealing, insulation)
•	What certifications are required for each job task
•	Material inventory and availability

•	Material performance
•	All activities being performed by crews and contractors on site
Ability to:	
•	Read and interpret the audit report
•	Integrate information from multiple sources
•	Estimate time required to complete each component of the work scope
•	Sequence required tasks
•	Assess crew member and contractor capabilities
•	Estimate job and personnel requirements based on conditions
•	Estimate amount of materials needed to complete job
•	Communicate at an appropriate level (e.g. technical to layman level, language barriers)
•	Relate well with others in tactful and professional manner
•	Conduct oneself in an ethical manner
•	Identify materials and methods appropriate for the current job
•	Job coach and relay retrofit techniques appropriately
•	Install appropriate containment zones with best practices
•	Perform and record all diagnostic procedures (e.g. blower door, manometer, duct blower, combustion analyzer)
•	Assess skills and recommend additional formal training for crew and contractors
•	Manage multiple operations and/or tasks on the job site
•	Use construction math (e.g. measure and compute area, volume, circumference)

8. Crew Leader Exam Blueprint (multiple-choice)

Duties and Tasks		
A		Develop and/or Review the Work Order
	1	Identify and disperse necessary paperwork (e.g. permits, releases, lead based paint EPA requirements, historic preservation, etc)
	2	Read, evaluate and discuss with relevant others (auditor, coordinator, program manager, etc) both audit and homeowner concerns
	3	Develop strategy for corrective actions necessary to achieve goals
	4	Develop production schedule for crews and subs
B		Identify materials and staffing needs
	1	Identify skill sets of individuals necessary for job(i.e. crew and contractors
	2	Identify total hours and number of individuals necessary to safely complete the job
	3	Identify, obtain and maintain tools, equipment and materials necessary to complete job
	4	Identify Personal Protective Equipment (PPE) necessary for job
C		Develop plan to execute work order on site
	1	Establish rapport and expectations with homeowner
	2	Conduct interior and exterior visual home inspection review with crew in order to confirm with client the completion of any prerequisite work
	3	Conduct interior and exterior visual home inspection review with crew in order to perform initial job site safety inspection
	4	Conduct interior and exterior visual home inspection review with crew in order to develop site-specific safety plan to address any unsafe conditions and possible hazards and inform crew
	5	Conduct interior and exterior visual home inspection review with crew in order to document pre-existing conditions (e.g. cracked window, cracked ceiling and walls)

6	Conduct interior and exterior visual home inspection review with crew in order to ensure work areas are accessible and scoped properly
7	Conduct interior and exterior visual home inspection review with crew in order to identify need for job change orders
8	Conduct interior and exterior visual home inspection review with crew in order to adjust work schedule as needed
9	Conduct informative walk through with homeowner to explain what crew will be doing and answer questions and concerns
10	Conduct informative walk through with homeowner to verify specific homeowner issues (allergies, valuable items, etc)
11	Conduct informative walk through with homeowner to obtain all necessary sign-offs before work begins
D	Prepare house to execute work
1	Protect interior/exterior of house (e.g. with drop cloths, poly, Tyvek booties, pressurization)
2	Set up proper containment, if necessary
3	Test in (e.g. blower door, room to room pressure tests, IR scans, combustion appliances)
4	Revise work order if necessary to reflect current conditions
E	Execute work order and manage project
1	Monitor safety practices for employees, contractors and job site
2	Communicate with and support crew to ensure job efficiency (e.g. unforeseen circumstances, materials and tools not originally specified)
3	Document work progression and work order changes with photos and notes
4	Maintain quality control
5	Clean up containment zones as necessary
6	Communicate with homeowner as necessary
7	Monitor use of resources (e.g. materials, manpower)
8	Verify that installers track and document material usage
9	Actively mentor crew (e.g. safety, work practices, professionalism)
10	Monitor contractor for job site compliance
11	Conduct daily final walk through to verify that all components of that day's work scope have been completed and cleaned up appropriately
F	Job Finalization Activities
1	Walk through to verify that all components of the work scope have been completed
2	Test out (e.g. blower door, IR scans, worst-case draft, combustion testing)
3	Complete clean up
4	Final walk through with homeowner/responsible party
G	Final Documentation
1	Obtain homeowner / responsible party job-completion sign-off signature
2	Complete all final job documentation (e.g. materials, man hours, photos, time sheets, certified renovator signatures, information for inspectors)

9. Crew Leader Exam Blueprint (field)

Duties and Tasks	
A	Develop and/or Review the Work Order
1	Identify and disperse necessary paperwork, (e.g. permits, releases, lead based paint EPA requirements, historic preservation, etc.)
2	Read, evaluate and discuss with relevant others (auditor, coordinator, program manager, etc.) both audit and homeowner concerns

	3	Develop strategy for corrective actions necessary to achieve goals
	4	Develop production schedule for crews and subs
B		Identify materials and staffing needs
	1	Identify skill sets of individuals necessary for job (i.e. crew and contractors)
	2	Identify total hours and number of individuals necessary to safely complete the job
	3	Identify, obtain and maintain tools, equipment and materials necessary to complete job
	4	Identify Personal Protective Equipment (PPE) necessary for job
C		Develop plan to execute work order on site
	2	Conduct interior and exterior visual home inspection review with crew in order to confirm with client the completion of any prerequisite work
	3	Conduct interior and exterior visual home inspection review with crew in order to perform initial job site safety inspection
	4	Conduct interior and exterior visual home inspection review with crew in order to develop site-specific safety plan to address any unsafe conditions and possible hazards and inform crew
	5	Conduct interior and exterior visual home inspection review with crew in order to document pre-existing conditions (e.g. cracked window, cracked ceiling and walls)
	6	Conduct interior and exterior visual home inspection review with crew in order to ensure work areas are accessible and scoped properly
	7	Conduct interior and exterior visual home inspection review with crew in order to identify need for job change orders
	8	Conduct interior and exterior visual home inspection review with crew in order to adjust work schedule as needed
	9	Conduct informative walk through with homeowner to explain what crew will be doing and answer questions and concerns
	10	Conduct informative walk through with homeowner to verify specific homeowner issues (allergies, valuable items, etc.)
	11	Conduct informative walk through with homeowner to obtain all necessary sign-offs before work begins
D		Prepare house to execute work order
	1	Protect interior/exterior of house (e.g. with drop cloths, poly, Tyvek booties, pressurization)
	2	Set up proper containment, if necessary
	3	Test in (e.g. blower door, room to room pressure tests, IR scans, combustion appliances)
	4	Revise work order if necessary to reflect current conditions
E		Execute work order and manage project
	1	Monitor safety practices for employees, contractors and job site
	2	Communicate with and support crew to ensure job efficiency (e.g. unforeseen circumstances, materials and tools not originally specified)
	3	Document work progression and work order changes with photos and notes
	4	Maintain quality control
	5	Clean up containment zones as necessary
	6	Communicate with homeowner as necessary
	7	Monitor use of resources (e.g. materials, manpower)
	8	Verify that installers track and document material usage
	9	Actively mentor crew (e.g. safety, work practices, professionalism)
	10	Monitor contractor for job site compliance
	11	Conduct daily final walk through to verify that all components of that day's work scope have been completed and cleaned up appropriately

F	Job finalization activities	
	1	Walk through to verify that all components of the work scope have been completed
	2	Test out (e.g. blower door, IR scans, worst-case draft, combustion testing)
	3	Complete clean up
	4	Final walk through with homeowner/responsible party
G	Job finalization activities	
	1	Obtain homeowner/ responsible party job-completion sign-off signature
	2	Complete all final job documentation (e.g. materials, man hours, photos, time sheets, certified renovator signatures, information for inspectors)

10. Standards of Reference

All BPI exams are based on a mixture of industry practices, axiomatic¹ concepts, and major standards of references. No singular source exists that could touch upon every aspect for what is considered testable. Conversely, there is no limit to the potential useful material found in print and online.

- BPI – Building Analyst Professional
- ASHRAE 62.2-2010
- Standard Work Specification (SWS) – <https://sws.nrel.gov/>

11. Exam Security

Exams are highly confidential materials. Any attempts to willfully compromise the integrity of the exam, the exam 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.

12. Granting

In order to receive CL certification, the candidate must meet all prerequisite requirements, as well as successfully complete both the multiple-choice (online) and combined practical (field) exams.

12.1 Notification of Exam Results and Certification

When exam results have been processed, the candidate will be notified via email that their exam results are ready to view. To view exam results, the candidate must log in to their [Candidate Account](#).

The BPI Certified Professional will be notified once BPI certification has been awarded. At that time, a temporary certificate can be downloaded and printed from their [Candidate Account](#). BPI will mail the Certified Professional a certification packet containing a printed certificate, a photo identification card, and patches. Certified Professionals should allow up to thirty (30) days after certification for their packet to arrive by mail.

The certificate will expire three (3) years from the date of initial certification.

¹ An axiomatic concept is something implicit that requires no proof or explanation (e.g. – the sum of 2 and 2 is 4, or gravity states that if you drop something, it will fall to a lower level).

The photo identification certification card contains, but is not limited to:

- name of the Certified Professional
- BPI ID number
- BPI's name and logo
- reference to a certification scheme (name of certification)
- date when certification expires

12.2 Time Limits for Completing Certification

BPI permits twelve (12) months to complete the certification process from the time a candidate takes the first exam. Candidates may challenge the CL online and combined field exam(s) up to six (6) times (each) in a one-year period. The one-year period begins after the first unsuccessful attempt of the exam, after which time a candidate will have five (5) more attempts to successfully challenge that particular exam.

Candidates that do not successfully complete the CL online and combined field exams and achieve certification within the one-year period, must wait for the one-year anniversary of the first unsuccessful attempt to challenge the exam(s) again.

12.3 Confidentiality of Information

BPI and BPI Test Centers 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 Test Center to protect the candidate's or Certified Professional's information.

13. Home Energy Professional Certification Renewal

13.1 Crew Leader Certification Renewal

BPI Certified Professionals who hold the Crew Leader certification will be required to renew their certification every three (3) years.

The certification renewal requirements for the BPI certified Crew Leader must be completed prior to the current certification expiration date. The Certified Professional will receive courtesy email notifications at 120, 90, 60 and 30 days reminding them of their certification expiration. Certified Professionals will be allowed to start the certification renewal process six (6) months prior to expiration, and if successful, will have the next renewal date as three (3) years from the current certification expiration date. If certification renewal is completed more than six (6) months in advance, the expiration date will change to the date of last successful exam.

Certification Renewal: when a BPI Certified Professional successfully attempts to renew their Crew Leader certification on or before their current certification expiration date within the confines of the BPI Certification Renewal requirements as outlined below.

To be eligible for certification renewal, BPI certified Crew Leaders:

- may accumulate a minimum of twenty-four (24) qualifying* continuing education units (CEUs) over the three (3) years of certification in order to bypass the online exam, OR
- successfully challenge the online exam that is current at the time of renewal.

***Qualifying CEUs are defined as any educational trainings/sessions that align with the Functions and Task (knowledge, skills and abilities) section in the Crew Leader certification scheme handbook.**

In addition to either accumulating the minimum number of qualifying CEUs **OR** successfully completing the corresponding online exam, the Certified Professional must successfully complete the field exam that is current at the time of renewal. There is no allowance for bypassing the field exam in order to renew the Crew Leader certification.

By completing certification renewal, all BPI certified Crew Leaders are re-attesting to the Code of Ethics located in the Crew Leader scheme handbook (Appendix B).

Initial Certification Renewal Scenarios		Certification Result:
If individual completes:	Plus one of the items below:	
Field Exam (Successful)	Online Exam (Successful)	Certification Renewal Completed
Field Exam (Successful)	Relevant CEUs (bypass online exam)	Certification Renewal Completed

As part of the certification renewal process, BPI will review the certified Crew Leader's file for any open complaints. Should there be any open complaints at the time of expiration, BPI will not award certification renewal. The certification of the individual will be withdrawn or revoked due to the certified person's negligent refusal to follow the certification scheme requirements.

13.2 Home Energy Professional Certification Reissuance

Any unsuccessful attempt at certification renewal will end the current certification. Please refer to the table below for details about the different Certification Reissuance Requirements.

Certification Reissuance: when a BPI Certified Professional attempts to renew their Crew Leader certification on or within six (6) months prior to their current certification expiration date, **AND is unsuccessful on one (1) of the renewal exams in the above chart**, the current certification will end and be deactivated. If the candidate can then successfully challenge that unsuccessful exam within a one-year period, as outlined in the chart below, the certification will be reissued

A candidate will have five (5) more attempts to successfully challenge the exam. There is a cost for each exam. BPI permits twelve (12) months to complete the certification process from the time a

candidate takes the first exam. Candidates who do not complete the certification process within the one-year period must retake both the online and field exams.

*** CEUs may only be accumulated for renewal; if the certification ends due to an unsuccessful online exam, CEUs cannot be accumulated towards certification reissuance.**

***Certification Reissuance is not considered a renewal of the original certification.**

Initial Certification Renewal Scenarios		Certification Result:
If individual completes:	Plus one of the items below:	
Field Exam (Successful)	Online Exam (Unsuccessful)	Current certification is deactivated. Candidates will have one (1) year from the date of the successful field exam to successfully challenge the online exam to complete the certification. New certification date will be the date of the successful online exam.
Online Exam (Successful)	Field Exam (Unsuccessful)	Current certification is deactivated. Candidates will have one (1) year from the date of the successful online exam to successfully challenge the field exam to complete certification. New certification date will be the date of the successful field exam.
Relevant CEUs (bypass online exam)	Field Exam (Unsuccessful)	Current certification is deactivated. Candidates will have one (1) year from the date of the unsuccessful field exam to complete the certification. New certification date will be the date of the successful field exam.

By becoming BPI QCI certified, Certified Professionals are automatically re-attesting to BPI's Code of Ethics.

14. Surveillance

Surveillance of the Certified Professional is established to ensure compliance to the policies and procedures for which the certification was granted. The certification of the individual may be withdrawn or revoked due to Certified Professional's negligent refusal to follow the certification scheme requirements or failure to take appropriate corrective action as required by BPI.

15. File Review

The Certification Department will conduct a file review of Certified Professionals that have complaints filed against them. The review of the Certified Professional's file activities includes confirmation that any complaints against the Certified Professional have been resolved.

16. Corrective / Preventative Action

The corrective / preventative action shall include one of the following and is determined on a case by case basis at the discretion of BPI:

Level One: A corrective action will be given when the infraction is considered minor in nature. A written warning shall be sent to the Certified Professional about the nature of the infraction along with the required corrective action. The written warning shall become part of the Certified Professional's record.

Level Two: A corrective action will be given when the infraction is considered major in nature and requires proof. A written warning is sent to the Certified Professional about the infraction. The Certified Professional is required to submit documented proof that the infraction has been corrected. The written warning and response will become part of the Certified Professional's record.

17. Withdrawal of Certification

Should the BPI certified Crew Leader not maintain certification by not being able to fulfill the obligation of the certification due to illness, disability, change of profession, etc., the certification will be withdrawn at the request of the Certified Professional. BPI must be notified immediately if a Certified Professional may not be able to, or is no longer able to, fulfill the requirements of the certification.

BPI reserves the right, on a case by case basis, to withdraw a person's BPI Certification(s) at its discretion. Reasons for withdrawal of a BPI Certification include, but are not limited to:

- Failure to meet certification renewal criteria as outlined in Section 13
- Failure to take steps to submit the requested information of a corrective action as outlined in Section 16
- Failure to follow the BPI Energy Auditor Code of Ethics and/or Code of Conduct
- Failure to follow BPI Standards that align with the certification's JTA's, when applicable

In the event the BPI Crew Leader certification is withdrawn; the BPI Manager of Client Relations will review the Certified Professional's record and send confirmation of the withdrawal within thirty (30) days and provide a written statement in regard to steps that must be taken if the candidate requests the certification be reinstated.

Use of the BPI logo or brand and representation of being BPI certified must cease immediately if a certification is withdrawn, revoked, or expired.

18. Appeal Procedure

Individuals who wish to file an appeal of a decision on certification, against the results of an CL exam, or regarding the suspension of the CL certification, must do so in writing.

Appeal Process for Exam Review

To contest the results of an CL exam, the candidate must follow the procedures, below:

1. A request for review must be made within thirty (30) days from the date of the exam. The request for review may be made in the following manner:
 - a. Submit the Exam Grade Appeal Form via the [BPI website](#):
Go to www.bpi.org and hover over **About Us** at the top of the page, select **Contact Us**. Enter your information and choose **Exam Grade Appeal** from the **Category** dropdown box.
 - b. Send a letter via registered mail to:
Building Performance Institute, Inc.
Attn: Appeals
107 Hermes Road, Suite 210
Malta, NY 12020
 - c. Send an email to Complaints@bpi.org
2. The request for review must specifically state the reasons why the candidate believes the initial decision should be modified or overturned and provide information on the issue; or include a specific reference where required procedures were not followed.
3. The review will be carried out by the Quality Assurance (QA) Department. Review results will be forwarded to the Director, who will provide the decision to the candidate, via email, within thirty (30) days of receiving the request for appeal.

Appeal Process for Suspension of Certification

For a review of suspension or withdrawal of certification, the Certified Professional must follow the procedures, below:

1. A request for review must be made within thirty (30) days from the date of the suspension or withdrawal of certification. The request for review may be made in the following manner:
 - a. Submit the Complaint Form via the [BPI website](#):
Go to www.bpi.org and hover over **About Us** at the top of the page, select **Contact Us**. Enter your information and choose **Complaint Form** from the **Category** dropdown box.
 - b. Send a letter via registered mail to:
Building Performance Institute, Inc.
Attn: Appeals
107 Hermes Road, Suite 210
Malta, NY 12020
 - c. Send an email to Complaints@bpi.org
2. The request for review must specifically state the reasons why the Certified Professional believes the initial decision should be modified or overturned and provide new information on the issue; or include a specific reference where required procedures were not followed.
3. The review will be carried out by the Quality Assurance (QA) Department. Review results will be forwarded to the Director, who will provide the decision to the candidate, via email, within thirty (30) days of receiving the request for appeal.

19. Complaints

BPI recognizes that there are two main types of complaints that may be brought to its attention:

- Complaints regarding BPI and/or its related vendor organizations (administrative, testing, Test Center, proctor, etc.)
- Complaints regarding BPI Certified Professionals

Complaints Process

To file a complaint, the individual must follow the procedures, below:

1. A complaint must be made within thirty (30) days from the date that the situation occurred. The request for review may be made in the following manner:
 - a. Submit the Complaint Form via the [BPI website](#):
Go to www.bpi.org and hover over **About Us** at the top of the page, select **Contact Us**. Enter your information and choose **Complaint Form** from the **Category** dropdown box.
 - b. Send a letter via registered mail to:
Building Performance Institute, Inc.
Attn: Complaints
107 Hermes Road, Suite 210
Malta, NY 12020
 - c. Send an email to Complaints@bpi.org
2. The request for review must provide specific details for the complaint and any type of documented information that pertains to the situation.
3. The review will be carried out on a case by case basis by the Quality Assurance (QA) Department. Review results will be forwarded to the Director, who will provide the decision to the complainant, via email, within thirty to forty (30 – 40) days of receiving the complaint.

Appendix A – Code of Conduct

1. Code of Conduct

Certification may be denied, suspended, or revoked, if an individual is not in compliance with this Code of Conduct. Grounds for disciplinary action include (but are not limited to):

1. An irregular event in connection with an exam, including (but not limited to) copying exam materials, causing a disruption in the testing area, and failure to abide by reasonable test administration rules;
2. Taking the exam for any purpose other than that of becoming certified in the technical area referenced in the title of the exam;
3. Disclosing, publishing, reproducing, summarizing, paraphrasing, or transmitting any portion of the exam in any form or by any means, verbal, written, electronic or mechanical, without the prior expressed written permission;
4. Providing fraudulent or misleading information;
5. Failure to pay fees when due;
6. Unauthorized possession or misuse of certifications;
7. Misrepresentation of certification status;
8. Failure to provide requested information in a timely manner;
9. Impairment of professional performance because of habitual use of alcohol, drugs, or other substance, or any physical or mental condition;
10. Gross or repeated negligence or malpractice in professional work;
11. Failure to maintain a current professional credential as required by the jurisdiction in which the individual practices (this may include a license, certificate, or registration);
12. The conviction of, plea of guilty to, or plea to a felony or misdemeanor related to public safety or the building industry;
13. Disciplinary action by a licensing board related to a building industry; and
14. Other failure to maintain continuous compliance with the certification standards, policies, and procedures related to your certification.

2. Disciplinary Actions

The following disciplinary actions may be taken as a result of non-compliance with this Code of Conduct:

- Denial or suspension of eligibility;
- Denial of certification;

- Revocation of certification;
- Non-renewal of certification;
- Suspension of certification;
- Reprimand; or
- Other corrective action.

Appendix B – Code of Ethics

The Building Performance Institute, Inc. (BPI) is committed to promoting the highest level of professionalism, integrity, and ability available in the residential contracting certification industry.

This Code of Ethics for Crew Leaders is designed to foster trust and mutual respect among individuals working in the industry as well as the public at large; it is intended to increase the esteem of the credentials and of the individuals who have earned them. This Code does not discourage healthy competition within the industry. BPI considers industry relationships critical to the industry's success. This Code is also not intended to limit the ability of Crew Leaders to earn fair compensation for their services. BPI's goal is to promote the professionalism of Crew Leaders' work products and thereby to enhance their quality.

I. Avoiding Conflicts of Interest
A. Crew leaders shall not participate in professional activities involving a conflict of interest. A conflict of interest occurs when a crew leader is inappropriately motivated by any financial, personal, or professional purpose other than the fulfillment of work orders. Work order fulfillment means the delivery of paid professional services, as specified, that skillfully, completely, and usefully meet the client's or employer's stated needs and desires, in compliance with all applicable codes, regulations, and standards.
B. Crew leaders shall avoid, whenever possible, even the appearance of a conflict of interest and shall disclose all potentially questionable associations and relationships in advance to any stakeholder with a legitimate right to be informed of them.
C. Crew leaders shall not accept any form of compensation for recommending products or services to clients or other parties.
D. When asked for professional recommendations, crew leaders shall direct the client to the official sources for up-to-date lists of Certified Professionals and accredited contracting companies before making any personal referrals. Personal referrals and recommendations are acceptable provided that they do not violate any article within this Code of Ethics.
II. Professionalism and Integrity
A. Crew leaders shall comply with all safety-related regulations, warnings, and instructions set forth by local, state, or federal organizations and other recognized safety organizations.
B. Crew leaders shall report to all appropriate parties any safety and security concerns directly related to any work performed by any previous or other current contractors or employees. Crew leaders shall report any additional safety and security concerns to the client.
C. Crew leaders shall guide or perform work based on best practices and standards in the field, using diagnostic and testing visual inspection within their areas of education, training, and expertise.
D. The crew leader shall manage personnel and materials on the job site in a safe and effective manner.
E. The crew leader shall use quality control, testing procedures, documentation, and a final walk through to ensure that all work is completed to the client's satisfaction.
III. Representation of the Crew Leader Profession and Self-Representation
A. Crew leaders shall neither misrepresent nor knowingly deceive others concerning their experience and capabilities.
B. Crew leaders shall neither misrepresent nor misuse their certification.

C. Crew leaders shall not engage in any conduct that is detrimental to the reputation or the best interests of the Crew Leader Certification, the profession, or the industry as a whole.
D. Crew leaders shall act professionally at all times and in the best interests of the client and employer. Crew leaders shall not act in any way that denies or impedes competent, timely, and professional service to the client or employer.
E. Crew leaders shall not willfully damage, or by negligence or indifference allow to be damaged, any property belonging to clients or employers. Crew leaders shall take reasonable means to protect the owner's health, safety, property, and possessions and also to prevent the undue loss, theft, waste, and dissipation of the owner's funds, resources, and supplies.
F. Crew leaders shall not betray the trust that property owners and employers have placed in them by inviting them to work in their homes and businesses.
G. Crew leaders shall ensure that individuals working under their supervision will act in a professional manner, in compliance with all applicable laws, regulations, and standards, and in compliance with all articles specified by this Code of Ethics.
IV. Maintaining Confidentiality
A. Crew leaders shall not discuss or disclose to third parties any confidential information about properties, employers, and clients, unless required by court order to do so. Confidential information is defined here as names, addresses, phone numbers, financial data, personal details, vulnerabilities, defects, measurements, diagrams, blueprints, photographs, recordings, electronic versions, and other descriptions or representations that only the employers or clients have a right and a need to know about and disseminate.
B. Crew leaders shall not, without permission, disclose private, confidential information about any client or employer for the use or interests of any third parties whose services and opinions have not been explicitly requested by the client or employer. Crew leaders may discreetly discuss their own work and working conditions with their family and associates, but not in any way that violates the privacy of the employers, clients, and relevant family members.
V. Disciplinary Actions and Appeal
A. Violation of any article of this Code of Ethics could result in disciplinary actions including the revocation of the Crew Leader Certification.
B. Crew leaders have the right to appeal any disciplinary decisions to the certifying body.

Appendix C – BPI Certification Agreement

BPI Certification Agreement

Crew Leader applicants will be required to accept BPI's Candidate Certification Agreement before beginning your exam. Make sure to read and be familiar with this agreement before you take your exam

BY SIGNING YOU ARE AGREEING TO THE TERMS AND CONDITIONS OF THIS CANDIDATE CERTIFICATION AGREEMENT. CANDIDATE OR CERTIFIED INDIVIDUAL MAY TAKE THE EXAM ONLY IF CANDIDATE OR CERTIFIED INDIVIDUAL AGREES TO THE TERMS AND CONDITIONS OF THIS AGREEMENT. IF CANDIDATE OR CERTIFIED INDIVIDUAL DOES NOT AGREE TO THE TERMS AND CONDITIONS, CANDIDATE OR CERTIFIED INDIVIDUAL SHALL SELECT "NO, I DO NOT AGREE" BELOW AND WILL NOT BE ALLOWED TO TAKE THE EXAM.

BPI and Candidate or certified individual hereby agree that the terms and conditions of the Agreement shall govern Candidate or certified individual's participation in BPI's Certification Exam and BPI's Certification.

1. CERTIFICATION

- a. The Candidate or certified individual must:
 - meet the prerequisites
 - pay the applicable exam fees;
 - accept the terms and conditions of this Agreement before completing the Exam;
 - pass the exam(s)
 - keep contact information up to date
- b. Modification to Certification Requirements. BPI's Director level staff may expand or reduce the title or scope of the desired certification or withdraw the certification.
- c. Termination. Candidate or certified individual may terminate this Agreement at any time upon written notice to BPI. The Certification or certified individual is valid for a period of three (3) years after the date of passing the last qualifying exam. If the candidate or certified individual chooses to terminate this agreement prior to the expiration date of their certification, the certification, including all related material, must be surrendered and will be void. Upon termination of this Agreement and after the expiration of the Certification, all rights related to the Candidate's Certification, including all rights to use the Certification and the Logo, will immediately terminate.

2. COMPLIANCE WITH TESTING REGULATIONS

Candidate or certified individual agrees to comply with all testing regulations required by BPI and/or its Test Centers and testing centers.

- d. No Cheating. Candidate or certified individual agrees that all answers submitted in completing the Exam are entirely their own. Candidate or certified individual will neither: (i) provide nor accept improper assistance; nor (ii) use unauthorized materials in attempting to satisfy Certification Requirements.
- e. No Misconduct. Candidate or certified individual agrees not to (i) falsify his or her identity or impersonate another individual; (ii) forge the Certification, Exam score reports, identification cards or any other Exam records; (iii) engage in fraudulent conduct or misrepresent him or herself as Certified when he or she has not successfully met the applicable Certification Requirements; (iv) misuse or disclose username and/or password or any other Certification identities; and/or (v) engage in any other misconduct that could be considered by BPI, in its sole discretion, as compromising the integrity, security or confidentiality of the Exam or the Certification.
- f. No Disclosure. Candidate or certified individual understands and agrees that the Exam is BPI's confidential and proprietary information. Candidate or certified individual agrees to maintain the confidentiality of the Exam and not disclose, whether verbally, in writing or in any media, the contents of the Exam or any part of the Certification. Further, Candidate or certified individual agrees not to request any other individual to disclose the Exam or any part thereof to the Candidate or certified individual.
- g. No Misuse of the Exam. Candidate or certified individual agrees not to copy, publish, offer to sell, sell, publicly perform or display, distribute in any way or otherwise transfer, modify, make derivative works thereof, reverse engineer, decompile, disassemble or translate the Exam or part thereof.

3. BPI ACTION FOR NON-COMPLIANCE

- h. Candidate or certified individual understands and agrees that, if for any reason and at its sole discretion, BPI believes the Candidate or certified individual violated the terms of this agreement or the criteria against which the competence of a person is evaluated in accordance with the scheme of the certification. BPI has the right to deny Candidate or certified individual any further participation in the Exam, cancel a passed Exam result, remove the Candidate or certified individual's certified status and any other rights previously conferred on the Candidate by BPI, and to permanently bar Candidate or certified individual from any further participation in BPI's Certification.

4. WITHDRAWAL OF CERTIFICATION

- i. Should the certified individual not maintain or not continue to prove their competence for this certification to the satisfaction of BPI, the certification will be withdrawn. In the event the certification is withdrawn, the BPI certification operations manager will review the certified individual's record and provide a written statement in regards to steps that will be taken in order for the certification to be reinstated.

Reasons for withdrawal of an individual's certification by BPI include, but are not limited to:

- Failure of the multiple-choice test instrument.
- Failure of field evaluation.
- Verification of a complaint by building owner or the owner's representative for failure to meet installation requirements and then not correcting the deficiency.
- Failure to take steps to correct improper practices.

- j. If the certified individual may not be able or is no longer able to fulfill the requirements of the certification the certified individual must notify BPI immediately and surrender all certification documents, such as BPI ID Card and BPI Certificate to BPI, and cease using any logo or marketing materials.

5. REPRESENTATIONS AND WARRANTIES

- k. By the Candidate or certified individual. Candidate or certified individual represents and warrants that: (i) Candidate or certified individual will refrain from any conduct that may harm the goodwill and reputation of BPI or its products and (ii) Candidate or certified individual shall not make any representation, warranty or promise on behalf of or binding upon BPI and (iii) Candidate or certified individual shall not make claims regarding certification outside of the intended scope of the appropriate certification.
- l. Candidate or certified individual agrees to not use the certificate in a manner that is misleading or unwarranted.

6. INDEMNIFICATION

- m. Candidate or certified individual agrees to indemnify, defend and hold BPI harmless against any losses, liabilities, damages, claims and expenses (including attorneys' fees and court costs) arising out of any claims or suits, whatever their nature and however arising, in whole or in part, which may be brought or made against BPI, or its Test Centers, officers, employees or assigns, in connection with: (i) any personal injury, property damage or other claims which are caused, directly or indirectly by any negligent act, omission, illegal or willful misconduct by the Candidate or certified individual, (ii) Candidate or certified individual's use or misuse of the Certification and/or the Logo; (iv) Candidate or certified individual's use or misuse of BPI' confidential information; and/or (v) Candidate or certified individual's breach of any obligations or warranties under this Agreement.

7. LIMITATION OF LIABILITY

- n. Damages. BPI shall not be liable for any indirect, incidental, special, punitive, or consequential damages or any loss of profits, revenue, or data. BPI's liability for direct damages, whether in contract, tort or otherwise, shall be limited to the fees paid to BPI under this Agreement.

8. CONFIDENTIALITY UNDERTAKING

- o. By signing this Agreement, Candidate or certified individual agrees to all terms and conditions herein
- p. Candidate agrees (i) to hold Confidential Information in confidence and take all reasonable precautions to protect it, (ii) not to, directly or indirectly, use Confidential Information at any time during the certification procedure, the performance of the Exam and thereafter, and (iii) not to, directly or indirectly, disclose, publish, reproduce or transmit any Confidential Information completely or in part to any third party, in any form, including but not limited to verbal, written, electronic or any other means for any purpose without the prior express written permission of BPI.
- q. BPI retains all rights, title and interest in and to all information, content and data contained in the Exam and all copyrights, patent rights, trademark rights and other proprietary rights thereto provided by BPI under the certification procedure and Exam.

Upon any breach by the Candidate or certified individual of the confidentiality undertaking in the Candidate Certification Agreement, BPI may automatically and without notice withdraw Candidate's Certification. Further, BPI is entitled to pursuing any other available remedy for unauthorized disclosure or for breach of the confidentiality undertaking in said Agreement.

Appendix D – Candidates with Special Testing Accommodations

Candidates with Special Testing Accommodations

The Americans with Disabilities (ADA) Act provides comprehensive civil rights protection for qualified individuals with disabilities. An individual with a disability is a person who: (1) has a physical impairment or a mental impairment that substantially limits a major life activity, (2) has a record of such impairment, or (3) is regarded as having such an impairment.

The ADA does not specifically name all of the impairments that are covered. If you have a disability, you have the right to inquire and receive information about testing accommodations.

“Testing Accommodation” means an adjustment to or modification of the standard testing conditions that eases the impact of the applicant’s disability on the exam process without altering the nature of the exam.

As an applicant claiming a disability that requires testing accommodations, the applicant must properly complete the Special Testing Accommodation form. The burden of proof is on the applicant to establish the existence of a disability protected the Americans with Disabilities Act, as well as to establish the need for testing accommodations. Each application is evaluated on a case by case basis.

Qualified individuals with disabilities are required to request accommodations every time they plan to take the exam. It is in the candidate’s best interests to provide recent and appropriate documentation, which clearly defines the extent and impact of the impairment(s) upon current levels of academic and physical functioning.

- Request for accommodations and appropriate supporting documentation, which when completed, should provide evidence of a substantial limitation to physical or academic functioning.
- Clinical evaluations and exams of the candidate that have resulted in a diagnosis of a physical or mental impairment must have been performed by a licensed/certified or otherwise qualified professional with credentials appropriate to diagnose a candidate’s disability consistent with the provisions of the ADA. Details about the professional’s area of specialization and professional credentials must be provided.
- Documentation must be submitted on official letterhead from a licensed or qualified professional who examined the candidate and diagnosed a physical or mental impairment. Depending on the disability and written evaluation, documentation may include a letter from a physician or a detailed report.
- Document must be no more than 3 years old.
- Documentation for all disabilities should describe the extent of the disability and recommended accommodations.

A diagnosis of Attention Deficit Disorder (ADD) or Attention Deficit Hyperactivity Disorder (ADHD) must be supported by a current (administered within the past three years) comprehensive evaluation and relevant neuropsychological or psychoeducational assessment batteries. The report must include documented information that the patient meets criteria for long standing history, impairment, and pervasiveness. The report must include specific diagnosis of ADHD based on the DSM-IV diagnostic criteria.

- [Candidate Application for Special Testing Accommodations](#), or go to www.bpi.org
- [Provider Application for Special Testing Accommodations](#), or go to www.bpi.org
- Clinical evaluation on official letterhead (letter or detailed report)

Please submit the forms at least 2 weeks prior to your scheduled exam.

Once these forms have been reviewed the applicant will receive notification of approval or denial from BPI. If approved, you must bring the approval notice with you to the BPI Test Center.

Appendix E – Language Barrier Testing Accommodations

Language Barrier Testing Accommodations

If you have difficulty in comprehending the language of the exam, 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 an online or field exam, provided that the interpreter is a bona fide interpreter that is engaged in that profession and that is pre-approved by BPI.

BPI Standard Testing Accommodations for candidates with a language barrier.

Online Exams:

Exam times will be doubled.

Field Exams:

Exam times will be doubled.

- [Candidate Application for Language Barrier Testing Accommodations](#), or go to www.bpi.org

Please submit the form at least 2 weeks prior to your scheduled exam.

Once the form has been reviewed the applicant will receive notification of approval or denial from BPI. If approved, you must bring the approval notice with you to the BP Test Center.

Appendix F – Continuing Education Units (CEUs) for HEP Certifications

Continuing Education Units (CEUs) are an integral aspect of BPI's certifications. Continuing education permits BPI Certified Professionals to keep up with a quickly changing industry and bypass most online exams when renewing their certification(s). Continuing education improves a Certified Professional's knowledge and ability to properly diagnose a home and recommend improvements.

BPI CEU Providers are existing BPI Test Centers or outside organizations who provide relevant continuing education and submit their courses to BPI for review for BPI Continuing Education Units (CEUs). Certified candidates can search for opportunities for CEUs in their candidate account or by going to the bpi website at http://www.bpi.org/schedules_candidate.aspx. BPI does not endorse the content, instructor or guarantee quality of the course or instruction.

As an option to bypass the online testing at the time of recertification, candidates may have collected CEUs and applied them as described in Section 15 of this document. Active CEU values apply to a candidate's certification(s) at the time of renewal. The required number of CEUs used to bypass online testing will not increase when renewing multiple certifications at the same time. Acquiring CEUs is an option for recertification and is not mandatory.

CEUs - Self-Attesting

BPI Certified Professionals that are self-attesting to CEUs for certification renewal must submit proof (certificates of completion must include course name, date and organization) through the [CEU Portal](#) no less than thirty (30) days prior to the certification expiration date. CEUs submitted less than thirty (30) days prior could result in those CEUs not being applied toward a candidate's recertification. If you attended a BPI preapproved class that is not showing in your candidate account, please contact the presenter directly. Proof of attendance for BPI pre-approved courses must be submitted by the presenter. The candidate is responsible for ensuring that all CEU submissions are credited in their individual BPI candidate account as there are no extensions given.

***Any attempt at recertification that is unsuccessful will end the current certification.**

Categories and Category Definitions

All material should be considered with the following ratios (number of hours of training to number of CEUs awarded):

Training Hours to CEU Ratio	Categories of CEU Consideration	
1:1	BPI Whole-house Training	Every hour of training earns 1 CEU (dedicated to whole-house applications and interactions and must incorporate 70% of content from the Knowledge, Skills and Abilities in the Scheme Handbook)
2:1	Specialized Software	2 hours of training earns 1 CEU (e.g., trades related software training, such as audit, sizing and infiltration)

Training Hours to CEU Ratio	Categories of CEU Consideration	
2:1	Non Whole-house Training	2 hours of training earns 1 CEU (e.g., any non-building specific training without whole-house application, such as heating plant installation, framing, ventilation and blower door testing)
3.5:1	Building Code Sessions	3.5 hours of training earns 1 CEU (e.g., sessions related to building codes)
4:1	Primary Certification Training	4 hours of training earns 1 CEU (e.g., training designed for preparation of certification)

- **BPI Whole House Training:** Must incorporate 70% of content from BPI's Testing Knowledge Lists. (e.g. exterior/interior Inspection, lighting & appliances, combustion safety, blower door, moisture, air flow, insulation & R value, thermo dynamics-heat transfer, conduction, convection, radiation)
- **Specialized Software:** Training related to software modeling, work scope development, audit, sizing and infiltration.
- **Non Whole-House Training:** Any non-building specific training without whole-house application such as heating, plant installation, framing, ventilation, blower door testing, etc.
- **Building Code Sessions:** Sessions related to building codes.
- **Primary Certification Training:** Training designed in preparation for BPI certification.

Activities and Activity Definitions

Activity	CEU Hours Max	Proof
Technical Conferences	20 CEUs per certification cycle	Proof of attendance/ Certificate of Completion
Classroom Trainings	Unlimited	Proof of attendance/ Certificate of Completion
Webinars	10 CEUs per certification cycle	Certificate of Completion, email from presenter (included must be course name, date, organization, and length)
As Trainer	15 CEUs per certification cycle	Proof from Employer/Self Employed see below

Activity	CEU Hours Max	Proof
Participation on BPI Committees (i.e., Certification Scheme Committee(s), Subject Matter Experts, Standards Technical Committee, Working Groups)	6 CEUs per certification cycle	Committee roster and active participation in meetings (e.g., voting, attendance records)
Reading Articles	10 CEUs per certification cycle	Certificate of completion including proof of successful quiz. Quiz developed by article publisher and on the article content
Author of Related Published Book	10 CEUs per book with maximum of 20 CEUs per certification cycle	Date, Title and link to published book
Write a Related Educational Article	2 CEUs per article / 10 CEUs per certification cycle	Date, Title and link to article
Presentation of Pre-Reviewed Material	10 CEUs per certification cycle	Details about the course, BPI Approval and times
Online Training	Unlimited	Certificate of completion including proof of a successful quiz. Quiz developed by presenter on course content
*Certification cycle is the time between the date a certification was awarded and the expiration date.		

Technical Conference: Specific training sessions at technical conferences that align with BPI Standards and knowledge, skills and abilities (section 8 of this document) will be granted CEU credit(s). Candidates cannot get credit for attending a conference without proof of participation in training sessions.

Classroom Trainings: BPI considers classroom trainings to be educational sessions in which the instructor is conducting a program that aligns with BPI Standards and knowledge, skills and abilities (section 8 of this document) in real time; the instructor and students are engaged in the educational program at the same time.

Webinars: BPI defines webinars as those in which the instructor and student are separated by location but the instructor is conducting the program which aligns with BPI Standards and Testing Knowledge Lists in real time.

Trainer: Credits can be received by an individual who is instructing/teaching any training course that aligns with the BPI Standards and Testing Knowledge Lists.

Participation on BPI Committees: Candidate who participates on a BPI committee can receive CEU credit.

Reading Articles: Credit will be allowed for Certified Professionals reading any published article(s) that align with BPI Standards and Testing Knowledge Lists and passes a corresponding quiz related to the content of the article. These articles are usually pre-approved.

Author of Related Published Book: Credit may be allowed for authorship of published books related to BPI Standards and Testing Knowledge Lists.

Write a Related Educational Article: Credit may be allowed for authorship of published articles related to BPI Standards and Testing Knowledge Lists.

Presentation of Pre-reviewed Material: BPI considers live presentations to be educational sessions in which the instructor is conducting the program in real time. All material needs to be reviewed and approved prior to presentation.

Online Sessions: BPI considers online sessions to be educational sessions that align with BPI Standards and Testing Knowledge Lists that can be accessed at any time and where there is no live instructor. Candidates must pass a corresponding quiz related to the content of the course created by the presenter.

Limitation of Repeat Courses

CEUs will be awarded for activities that Certified Professionals participate in that are the same; however, a candidate will not earn CEUs for the same class taken more than two (2) times within a certification cycle.

Quality Assurance

Any CEUs that are submitted must align with the Knowledge Skills and Abilities listed in the Functions and Tasks (section 8) section of this document. BPI will perform random audits on continuing education units/credits submitted by candidates. This is to ensure CEU Quality Assurance. At its discretion, BPI reserves the right to change the status, revoke or withdraw any certification or CEU submitted based on any form of non-compliance found during a routine audit. Upon a quality assurance audit, CEUs submitted could have a status change (from approved to not approved, etc.) or the number of credits could be changed which could affect recertification. Candidates are responsible for checking their candidate account to make sure they have enough CEU credits.

Contact Information

Questions regarding CEUs can be addressed via email CEUs@bpi.org or call 1-877-274-1274 ext. 292.

Terms and Definitions

Appeal – Request by applicant, candidate or certified person for reconsideration of any adverse decision made by the certification body related to her/his desired certification status.

Candidate – Applicant who has fulfilled specified prerequisites, allowing his/her participation in the certification process.

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

Certification Process – All activities by which a certification body establishes that a person fulfills specified competence requirements, including application, evaluation, decision on certification, surveillance and recertification, use of certificates and logos/marks.

Certification Scheme – Specific certification requirements related to specified categories of persons to which the same particular standards and rules, and the same procedures apply.

Certification System – Set of procedures and resources for carrying out the certification process as per a certification scheme, leading to the issue of a certificate of competence, including maintenance.

Competence – Demonstrated ability to apply knowledge and/or skills and, where relevant, demonstrated personal attributes, as defined in the certification scheme.

Complaint – Conformity assessment request, by any organization or individual to a certification body, for corrective action relating to the activities of that body or to those of any of its customers.

Evaluation – Process that assesses a person's fulfillment of the requirements of the scheme, leading to a decision on certification.

Exam – Mechanism that is part of the evaluation, which measures a candidate's competence by one or more means such as online, oral, practical and observational.

Essential Learnings – Comprehensive list of Crew Leader functions and tasks as determined by a job task analysis.

Proctor – Person with relevant technical and personal qualifications, competent to conduct and/or score an exam; an individual approved to administer BPI certification exams..

Qualification – Demonstration of personal attributes, education, training and/or work experience.

Recertification – Process of confirming conformity with current certification requirements.

Scheme Committee – Group of people chosen by the certification body to provide input, recommendations, guidance and review of a certification scheme.

Surveillance – Periodic monitoring during the period of certification of a certified person's performance to ensure continued compliance with the certification scheme.

Test Center – An organization with a legal agreement between itself and BPI; authorized to give BPI certification exams.