



# Site Supervisor

CERTIFICATE SCHEME HANDBOOK



## **Notice**

Anyone interested in obtaining the BPI certificate as a Site Supervisor, will need to know the scope of the certificate and all requirements.

This certificate scheme handbook outlines the knowledge, skills and abilities needed for individuals to obtain the BPI certificate as a Site Supervisor.

Information in this scheme handbook represents the policies at the date of publication for the BPI certificate as a Site Supervisor. 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](http://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 3 certificates ([Building Science Principles](#), [Healthy Housing Principles](#), and [Site Supervisor](#)). BPI Certified Professionals hold over 15,000 active certifications supported by 100 BPI Test Centers and 250 Proctors. BPI has 320 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 Federal Tax ID 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 Certificate Schemes

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

The certificate 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 certificate scheme requirements on a regular basis.

Industry input on each certificate 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 certificate outlined in this scheme handbook is for a Site Supervisor who is involved in the retrofit of existing residential buildings. For a full listing of all BPI certificates and certifications offered, see the [www.bpi.org](http://www.bpi.org) website.

For individuals to obtain the BPI Site Supervisor certificate, successful completion of a multiple-choice exam to confirm the candidate's knowledge and skills is required to confirm the candidate's abilities.

To obtain the certificate, 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 certificate will be reviewed every five years and modified as required by the scheme committee with input from the residential retrofit industry. Modifications to the certificate 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 Site Supervisor Certificate

This certificate scheme handbook outlines the knowledge, skills, and abilities requirements for the Site Supervisor certificate (SSC).

The scheme defines the scope of the SSC as the following: A Site Supervisor is responsible for supervising and assisting in the retrofitting activities specified in the scope of work. They are responsible for interacting with the client, managing personnel, and ensuring that materials installed, and work performed on the job site are completed in a safe and effective manner. They are responsible for quality control, documentation, and assuring that all work is completed to applicable industry standards and specifications.

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

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

### 4. Preparing for the Site Supervisor Exam

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

- Download the latest version of the BPI Site Supervisor scheme handbook from [www.bpi.org](http://www.bpi.org)
- Read and understand all information.
- Refer to the Functions & Tasks section to be sure that you understand and can perform the tasks required for this certificate.
- Obtain reference materials for the multiple-choice and study well in advance of taking the exam.
- Application and supporting documents required to take the Site Supervisor Certificate can be completed [here](#). Application processing could take up to one week before a candidate will receive an approval letter to take the exam. 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 certificate exam (proof of experience is required with your application):

- You must obtain and demonstrate a minimum amount of building science knowledge by having **at least one** of the following criteria met:
  - As part of your primary job function (energy auditor, lead technician, energy modeler) performed a minimum of 10 home energy assessments on existing residential structures.
  - In person or virtual building science training from an industry specific training center, college, or vocational school (e.g., training given by weatherization training centers or training that has been pre-approved for BPI CEUs (e.g., contractor's internal training). A minimum of 10 hours.
  - Hold an active HERS, LEED, Investor Confidence Project (ICP) Quality Assurance Assessor, or BPI certification.
  - Achieve BPI's Building Science Principles certificate.
- You must obtain a minimum of **30 points** from any combination of activities below in the past five (5) years.
  - Building trades experience (framing, roofing, drywall, siding, weatherization, energy audits, QCI inspections). **Maximum of 10 points**
    - **5 Points** for each 1,000 hours
  - In person or virtual training that aligns with the content of the job task analysis for the certificate from an industry specific training center, college, or vocational school (e.g., training given by weatherization training centers or training that has been pre-approved for BPI CEUs (e.g., contractor's internal training). **Maximum of 10 points**
    - **5 points** for every 20 hours (classroom or field)
  - Building trades Site Supervisor on jobsites (does not need to be energy industry) **Maximum of 20 points**
    - **5 points** for every 1,000 hours.
  - Active related industry certifications (RESNET, BPI, NATE, HPIP, SPFA, OSHA, EPA). Other certifications also considered.
    - **5 points** per certification
  - Trainers or BPI Field Proctors may qualify under the experience requirement with proof of relevant training or field proctoring (or a combination of both). **Maximum of 10 points**
    - **5 points** for every 1,000 hours.

**For company employees:**

BPI accepts a signed certificate or a signed letter, on company letterhead, from current and/or past employers documenting work experience. For the applicant's convenience, a standard template letter is included with the SSC application. Simply print the template on company letterhead, fill out the requested information and have it signed by a supervisor.

**For individuals who are self-employed, BPI accepts a letter self-attesting to the experience portion only.**

**ADDITIONAL EXAMPLES OF ACCEPTABLE PROOF:**

Listed below are some examples of qualifying proof for the building science knowledge requirements:

- 10 Home Energy Audits: Submit the actual audits or a letter from employer (on letterhead; 1<sup>st</sup> template at the end of this document) verifying that the candidate has completed 10 Energy Audits
- Building Science Training: Submit Certificate of Completion or letter from training organization (on letterhead; 1<sup>st</sup> template at the end of this document) with course info and hours, or screenshot of training portal that shows course info, hours and candidate name
- Certifications: Copy of certificate or letter from certifying body or screenshot of portal with certification information
- Building Science Principles: Certificate of Completion or Screenshot of BSP portal with successful grade

Listed below are some examples of qualifying proof for the required activities adding up to 30 points:

- Building Trades or Lead Foreman Experience: Letter from employer (on letterhead; 2<sup>nd</sup> template at end of this document) signed by supervisor
- Training: Certificates of Completion or screenshot from training portal with course info and hours and dates (on letterhead; 3<sup>rd</sup> template at end of this document)
- Certifications: Certificate or letter from certifying body or screenshot of portal with certification information

- Trainer and BPI Field Proctor: Letter (on letterhead; 4<sup>th</sup> template at end of this document) from training center with number of hours of training and proctoring completed.

Candidates will be notified by BPI of approval to take the online exam.

## 4.2 Certificate Fees, Application, and Scheduling

BPI certificate exams are provided on-line and can be taken by you any day of the week at any hour of the day. In accessing the exam portal you will be able to submit your application to BPI, pay for your exam and ultimately take the exam.

## 5. Multiple-choice Exams

For the Site Supervisor certificate completion and passing a multiple-choice test taken on-line 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. There is not a time limit for the exam. The results page during the online exam session will indicate whether a candidate was successful or not.

This exam is an open book exam.

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, termination of status, civil liability, criminal prosecution, or other appropriate sanctions.

## 6. 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.

<b>SAFE WORK PRACTICE SKILLS</b>	
<b>Knowledge of:</b>	
•	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 (PPE)
•	Respiratory protection
•	Power-operated tools and machinery used on the job site
•	Fire prevention
•	Permit-required confined spaces



•	Selection and use of the appropriate PPE for a particular task
•	Safe use of basic hand and power tools
•	Lead safe work practices
•	Identifying serious mold conditions
•	Assessing work area safety hazards
<b>JOB SITE MANAGEMENT SKILLS</b>	
<b>GENERAL KNOWLEDGE, SKILLS AND ABILITIES</b>	
<b>Knowledge of:</b>	
<b>Review Work Order</b>	
•	Federal, state and local codes, regulations and requirements
•	Building science
•	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)
•	Material performance
•	All activities being performed by crews
•	Audit reports
•	Time required to complete each component of the work scope
•	Sequencing required tasks
•	Materials and methods appropriate for the job
•	Appropriate containment zones with best practices
•	Managing multiple operations and/or tasks on the job site
•	Construction math
•	Necessary paperwork (permits, lead based paint, EPA requirements)
•	Homeowner concerns
<b>Identify materials and staffing needs</b>	
•	Tools, equipment and materials necessary to complete job
•	PPE necessary for job
<b>Develop plan to execute work order on site</b>	
•	Establishing rapport with homeowner
•	Conducting interior and exterior visual home inspection review with crew in order to confirm with client the completion of any prerequisite work
•	Conducting interior and exterior visual home inspection review with crew in order to perform initial job site safety inspection
•	Conducting 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
•	Conducting interior and exterior visual home inspection review with crew in order to document pre-existing condition
•	Conducting interior and exterior visual home inspection review with crew in order to document pre-existing condition
•	Conducting interior and exterior visual home inspection review with crew in order to ensure work areas are accessible and scoped properly
•	Conducting interior and exterior visual home inspection review with crew in order to identify need for job change orders

•	Conducting informative walkthrough with homeowner to explain what crew will be doing and answer questions and concerns
•	Conducting informative walkthrough with homeowner to verify specific homeowner issues
•	Conducting informative walkthrough with homeowner to obtain all necessary sign-offs before work begins
<b>Prepare house to execute work</b>	
•	Protecting interior/exterior of house (e.g., with drop cloths, poly)
•	Construction dust and debris containment, if necessary
<b>Execute work order and manage project</b>	
•	Safety practices for employees
•	Documenting work progression and work order changes with photos and notes
•	Maintaining quality control
•	Communicating with homeowner as necessary
•	Tracking and documenting material usage
•	Monitoring sub-contractors for job site compliance
•	Daily final walkthrough to verify that all components of that day's work scope have been completed and cleaned up appropriately
<b>Job Finalization Activities</b>	
•	Walkthrough to verify that all components of the work scope have been completed
•	Completing cleanup
•	Final walkthrough with homeowner/responsible party
<b>Final Documentation</b>	
•	Homeowner / responsible party job-completion sign-off signature
•	Final job documentation (e.g., materials, photos, certified renovator signatures, information for inspectors)

## 7. Standards of Reference

All BPI exams are based on a mixture of industry practices, axiomatic<sup>1</sup> 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
- ANSI/BPI-1100-T-2014 Home Energy Auditing Standard
- ANSI/BPI-1200-S-2017 Standard Practice for Basic Analysis of Buildings
- Standard Work Specification (SWS) – <https://sws-2017.nrel.gov>

<sup>1</sup> 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).

## **8. Exam Security**

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

## **9. Granting**

In order to receive SSC, the candidate must meet all prerequisite requirements, as well as successfully complete the multiple-choice (online) exam.

### **9.1 Notification of Exam Results and Issuance of Certificate**

The Site Supervisor Certificate will be available through your Site Supervisor Dashboard. You may select the Print Certificate button and save your certificate to your computer or print it.

The certificate does not expire and may be accessed at any time by simply logging in via [www.ssc.bpi.org](http://www.ssc.bpi.org).

**\*\*This letter is not valid unless presented on company letterhead\*\***

Date:

Re: Proof of **Building Science Knowledge** (1<sup>st</sup> main bullet under Section 4.1) for the Site Supervisor Certificate Exam

To: [submit with application]

This letter is to verify that \_\_\_\_\_ has completed relevant experience in at least one of the following (check all that apply):

\_\_\_\_\_ at least 10 home energy assessments on existing residential structures, OR

\_\_\_\_\_ at least 10 hours of in person or virtual building science training from an industry specific training center, college, or vocational school

By signing this document, you are attesting that the information provided on this form is true and accurate to the best of your knowledge and the stated applicant's participation in the task(s) or job functions as described above are true and correct.

Supervisor's Name and title (typed):

\_\_\_\_\_

Supervisor's signature: \_\_\_\_\_ Date: \_\_\_\_\_

**\*\*This letter is not valid unless presented on company letterhead\*\***

Date:

Re: Proof of Building Trades Experience or Site Supervisor on Jobsite Experience (2<sup>nd</sup> main bullet [POINTS] under Section 4.1) for the Site Supervisor Exam

To: [submit with application]

This letter is to verify that \_\_\_\_\_ has building trades experience or site supervisor experience (framing, roofing, drywall, siding, weatherization, energy audits, QCI inspections etc.).

\_\_\_\_\_ at least 1000 hours (5 points per 1000 hours; 10 points max), OR

(list 1000 or 2000 hours)

has building trades site supervisor on jobsite experience

\_\_\_\_\_ at least 1000 hours (5 points per 1000 hours; 20 points max)

(list 1000, 2000, 3000, or 4000 hours)

By signing this document, you are attesting that the information provided on this form is true and accurate to the best of your knowledge and the stated applicant's participation in the task(s) or job functions as described above are true and correct.

Supervisor's Name and title (typed):

\_\_\_\_\_

Supervisor's signature: \_\_\_\_\_ Date: \_\_\_\_\_

**\*\*This letter is not valid unless presented on company letterhead\*\***

Date:

Re: Proof of Training that aligns with the content of the job task analysis (2<sup>nd</sup> main bullet [POINTS] under Section 4.1) for the Site Supervisor Exam

To: [submit with application]

This letter is to verify that \_\_\_\_\_ has taken in person or virtual training that aligns with the content of the job task analysis for the certificate from an industry specific training center, college, or vocational school.

\_\_\_\_\_ 20 hours (5 points per 20 hours; 10 points max)

(list 20 or 40 hours)

By signing this document, you are attesting that the information provided on this form is true and accurate to the best of your knowledge and the stated applicant's participation in the task(s) or job functions as described above are true and correct.

Supervisor's Name and title (typed):

\_\_\_\_\_

Supervisor's signature: \_\_\_\_\_ Date: \_\_\_\_\_

**\*\*This letter is not valid unless presented on company letterhead\*\***

Date:

Re: Proof of Trainers or BPI Field Proctors Experience (2<sup>nd</sup> main bullet [POINTS] under Section 4.1) for the Site Supervisor Exam

To: [submit with application]

This letter is to verify that \_\_\_\_\_ has trainer or BPI field proctor experience.

\_\_\_\_\_ at least 1000 hours (5 points per 1000 hours; 10 points max)

(list 1000 or 2000 hours)

By signing this document, you are attesting that the information provided on this form is true and accurate to the best of your knowledge and the stated applicant's participation in the task(s) or job functions as described above are true and correct.

Supervisor's Name and title (typed):

\_\_\_\_\_

Supervisor's signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Terms and Definitions

**BPI National Standards** – The set of technical protocols and procedures that have been developed through an open, transparent, consensus-based process and are intended to achieve a high quality of residential building performance. BPI is approved by the American National Standards Institute, Inc. (ANSI) as an accredited developer of American National Standards.

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

**Certificate 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 certificate.

**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.

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

**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.

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