

# Memorandum

DATE: May 16, 2018

WAP Memorandum 036

REPLY TO

ATTN OF: **James Carlisle, Operations Supervisor** *JCC*  
**Weatherization and Intergovernmental Program Office**

SUBJECT: **Energy Auditor and Quality Control Inspector Certification Scheme Updates**

TO: **Weatherization Assistance Program Grantees**

INTENDED

AUDIENCE: **Grantee Program Managers, Grantee Technical Managers, Subgrantee Program Directors, Subgrantee Technical Managers, Subgrantee Quality Control Inspectors, Weatherization Training Centers**

The Department of Energy (DOE) implemented the Quality Work Plan (QWP) in Weatherization Program Notice (WPN) 14-4, Quality Work Plan Requirement, in 2013. In 2014, WPN 15-4, Quality Work Plan Requirement Update, superseded WPN 14-4. Both guidance documents describe the Weatherization Assistance Program (WAP) requirements for inspection and monitoring of work in section 3.

WPN 15-4, Section 3 states that competency as a final inspector of single family units is demonstrated by holding and maintaining the Home Energy Professional (HEP) Quality Control Inspector (QCI) certification, and that any unit reported as completed to DOE must be inspected by a certified QCI. The requirement for certification stays in place.

This memorandum addresses the 2018 update of the QCI and Energy Auditor (EA) certification schemes and how that will affect weatherization personnel.

## **Certification Scheme Updates:**

Industry best practice is to review and update Job Task Analyses (JTAs) and certification schemes every 5 – 7 years. The HEP JTAs and certification schemes were developed in 2011 – 2012 and were due for the regular update.

## **Credential and Micro-credential:**

Through reviewing the QCI and EA JTAs side by side, the certification scheme committee subject matter experts, assisted by professional psychometricians, determined that there was a great deal of overlap. It was jointly decided to retain EA as the “main” certification and reduce QCI to just those tasks and skills that were *not already represented* in the EA JTA. The result is that EA remains a full-scope certification, requiring prerequisites are met and passing a field and written exam.

QCI will become an “add-on” for EA credential holders, commonly called a micro-credential. The QCI credential will require EA certification as a prerequisite and passing a 60-question QCI written exam.

There are different avenues for meeting the prerequisite requirements depending on current certification status. Those are outlined in the attached Guidelines for Home Energy Professional (GHEP) brochure.

### **Pilot Exams:**

The exams will be updated and improved as part of the overall update of the JTAs and certification scheme. Pilots of these updated exams will be available at participating Building Performance Institute (BPI) test centers throughout the country from August through the end of September, 2018.

To encourage weatherization staff to take part in this critical part of the process, DOE will be offering to subsidize the exam fees of those currently employed by WAP by paying 100% of written exam fees for the first 100 test takers of each the EA and QCI written exams and paying 50% of the field exam fees for the first 100 people to take the EA pilot field test. Eligibility for the subsidies will be included in the application process. Continuing Education Units (CEU) cannot be applied for recertification during the pilot exam period.

Once enough qualified applicants have taken the pilot exams, there will be an “interim” period when only the 2011 EA and QCI exams are available. This interim period is used to analyze the results of the pilot exams to determine if they are adequately measuring competency. It is scheduled to take place from October 2018 to March 2019. It is during this period that pilot test takers will learn their results and successful candidates will be awarded the new credential(s). Those that fail the pilot exam can attempt the 2011 exams during the interim period.

As of March 2019, the updated EA and QCI exams and certifications schemes will be available, and the EA and QCI schemes and exams developed in 2011-2012 will be retired.

### **What this means for current QCIs:**

Most questions should be answered in the attached Frequently Asked Questions (FAQ) on the last page of the GHEP brochure. Some key points for current QCIs:

- You will need to maintain your QCI certification to continue working as a final inspector or technical monitor in WAP.
- Continue acquiring Continuing Education Units (CEUs) as available.
- If your current certification is set to expire between now and February 2019, consider taking part in the pilot phase. BPI will extend current certification periods to allow participation in the pilot phase.
- Review the EA prerequisites in the attached GHEP brochure. If you do not already meet the prerequisites required for EA, work to attain those trainings or other skills as needed.

### **Summary**

DOE has seen an improvement in work quality since adopting the QWP. The certification requirement remains in effect, and following industry best practice, the certification scheme is updated every 5 – 7 years. It is the opinion of DOE weatherization staff, members of the certification scheme committee and other stakeholders that the current updates will result in improved, streamlined JTAs and vastly improved written exams. DOE highly encourages participation in the pilot phase necessary to bring these improved schemes and exams to completion and provide valuable feedback before the new exams are finalized.

**Where to Learn More:**

If you have any questions that are not answered in the attached resources, if you are a WAP Grantee, please contact your Project Officer. All others please contact Derek Schroeder at [Derek.Schroeder@ee.doe.gov](mailto:Derek.Schroeder@ee.doe.gov). BPI will be updating their website with information about the pilots as it is available. They will include a map showing test centers participating in the pilots, to be updated weekly with new additions.

<http://bpi.org/certified-professionals>

BPI will also send updates regarding the pilots via e-mail, newsletters, and social media.