

Building Science Institute, Ltd. Co. Policy 08-2022 Terminology

This policy applies to Verification Organizations, the Building Science Institute, Ltd. Co., and the Building Science Institute Quality Council.

Referenced Documents

Building Science Institute Process 008 Sampling

Terminology

Acceptance sampling by attribute: on-site observation and performance testing in conformance with ENERGY STAR® Certification Protocols and referenced standards performed on a portion of the *sample set* to make a decision on the conformance of the entire *sample set* to the *expected values*.

Appeal: a request by the builder of the home to the *verification organization* for reconsideration by the *verification organization* of a decision it made relating to that home; a request by a *Quality Assessment Designee, Verifier, or Software Analyst* to the *Building Science Institute* for reconsideration of a decision it made related to the credential of the *Quality Assessment Designee, Verifier, or Software Analyst*; a request by a *verification organization* to the *Building Science Institute* for reconsideration of a decision it made related to the certification of a home.

Assessment: a systematic, independent, and documented process for obtaining *conformity assessment evidence* and evaluating it objectively to determine the extent to which the *conformity assessment criteria* are fulfilled.

Assessment client: the *verification organization* or person requesting the *assessment*.

Assessment conclusion: outcome of an *assessment* after consideration of the assessment objectives and all *assessment findings*.

Assessment criteria: the set of policies, procedures, or requirements used as a reference against which *assessment evidence* is compared.

Assessment evidence: records, statements of fact, or other information which are relevant to the *assessment criteria* and are verifiable.

Assessment findings: the results of the evaluation of the collected *assessment evidence* against the *assessment criteria*.

Assessment plan: description of the activities and arrangements for an *assessment*.

Assessment program: arrangements for a set of one or more assessments planned for a specific time frame and directed toward a specific purpose.

Assessment scope: the extent and boundaries of an *assessment* which includes a description of the physical locations, organizational units, activities and processes, and the time period covered by the *assessment*.

Assessment team: one or more *Quality Assessors* conducting an *assessment*, supported if needed by *technical experts*.

Auditee: verification manager of *verification organization* being assessed.

Building Science Institute: an organization that performs home certification oversight for the ENERGY STAR® New Homes, Indoor airPlus, Zero Energy Ready Home, and ERI certification programs; credentials *Software Analysts, Verifiers, Quality Assessment Designees* and *Quality Assessors*; performs *conformity assessments* on *verification organizations*.

Can: a possibility or capability.

Complaint: an expression of dissatisfaction (other than appeal) by any person or organization to the *Building Science Institute* or a *verification organization* that is related to the activities of the *Building Science Institute* or a *verification organization*, where a response is expected.

Conformity: fulfillment of a requirement.

Conformity assessment: an assessment to determine *conformity* to the process requirements for verification to produce an ENERGY STAR certified home.

Energy Code Compliance Specialist: a person credentialed by the *Building Science Institute* to collect data on-site and perform software analysis for compliance with the energy code prescriptive, UA, cost performance, and energy rating index paths; may also perform the same functions to produce a standard Energy Rating Index.

Energy Code Field Verifier: a person credentialed by the *Building Science Institute* to collect data on-site to verify compliance with the energy code prescriptive, UA, cost performance, and energy rating index paths; may also perform the same functions to produce a standard Energy Rating Index.

Energy Code Software Analyst: a person credentialed by the *Building Science Institute* to perform software analysis to verify compliance with the energy code UA, cost performance, and energy rating index paths; may also perform the same functions to produce a standard Energy Rating Index.

ENERGY STAR Field Verifier: a person credentialed by the *Building Science Institute* to collect data on-site to verify conformance with ENERGY STAR Certification Protocols.

ENERGY STAR Software Analyst: a person credentialed by the *Building Science Institute* to generate software simulation files that produce Energy Rating Index in conformance with ENERGY STAR Certification Protocols and referenced standards.

ENERGY STAR Verifier: a person credentialed by the *Building Science Institute* to perform verifications on homes and apartments through ENERGY STAR Certification Protocols and referenced standards, and includes both field verification and software analysis.

Expected values: the threshold specifications from the Worst-Case Analysis for the minimum rated features for the dwelling units selected for sampling in conformance with Building Science Institute Process 08 Sampling.

Guide: a person appointed by the *assessment client* to assist the *assessment team*.

Impartiality: presence of objectivity.
Indoor airPlus Verifier: a person credentialed by the *Building Science Institute* to collect data on-site to verify conformance with Indoor airPlus certification protocols.

May: a permission.

Multiple sampling plan: a sampling plan that requires a decision to accept or reject the members of a given *sample set* based on the results of the on-site observations and performance testing on a single random sample dwelling unit or multiple random sample dwelling units (if failing units are identified) within the *sample set*.

Must: a requirement.

Non-conformity: failure to meet a requirement.

Observer: a person who joins the *assessment team* but does not act as a *Quality Assessor*.

Population: The collection of all dwelling units under consideration during sampling. The population must be within the same building (multifamily), same subdivision or community, have the same construction type, and have the same envelope systems.

Quality Assessor: a person credentialed by the *Building Science Institute* who conducts a *conformity assessment* for the Building Science Institute's True North Quality Management Services.

Quality Assessment Designee: a credentialed *Quality Assessor* who conducts *verification organization* internal *conformity assessments* (1st party) with ENERGY STAR Certification Protocols (as applicable), Indoor airPlus certification protocols (as applicable), Zero Energy Ready Home certification protocols (as applicable), referenced standards and codes, Building Science Institute conformity assessment process requirements, and the *verification organization's Quality Management System*.

Quality function: individuals who are credentialed by the *Building Science Institute* as *Quality Assessors* or *Quality Assessment Designees* and perform *conformity assessments*.

Quality Management System: a system to establish quality management policy and objectives and to achieve those objectives.

Random sample: created when each dwelling unit in the population has an equal chance of inclusion in the sample, and is selected by the *verification organization* and NOT the homebuilder.

Risk: the effect of uncertainty on objectives.

Sample set: a population subgroup whose performance will be represented by inspecting and testing as few as one member of that subgroup. The sample set must be no larger than 7 dwelling units having projected closing dates within a 30 calendar day period.

Secondary interests: interests, whether real or perceived, that adversely influence objectivity, independence, fairness, and impartiality of *Quality Assessors*, *Quality Assessment Designees*, *Software Analysts*, and *Verifiers*.

Shall: a requirement.

Should: a recommendation.

Software Analyst: an individual who is credentialed by the Building Science Institute to perform energy modeling software analysis, and includes *Zero Energy Ready Home Software Analysts*, *ENERGY STAR Software Analysts* and *Energy Code Software Analysts*.

Technical expert: a person who provides specific knowledge or expertise to the assessment team, but does not act as an assessor.

Verification: examination of a dwelling unit and determination of its conformity with relevant certification protocols and referenced standards and codes.

Verification activities: on-site observations, performance testing, and energy modeling software analysis.

Verification organization: a business that employs or contracts *Software Analysts* and *Verifiers* who perform verifications according to ENERGY STAR Certification Protocols (as applicable) and referenced standards and codes; this includes sole proprietorships.

Verifier: an individual who is credentialed by the Building Science Institute to perform field verifications, and includes *Zero Energy Ready Home Verifiers*, *Zero Energy Ready Home Field Verifiers*, *Indoor airPlus Verifiers*, *ENERGY STAR Verifiers*, *ENERGY STAR Field Verifiers*, *Energy Code Compliance Specialists*, and *Energy Code Field Verifiers*. *Zero Energy Ready Home Field Verifier*: a person credentialed by the *Building Science Institute* to collect data on-site to verify conformance with Zero Energy Ready Home Certification Protocols.

Zero Energy Ready Home Software Analyst: a person credentialed by the *Building Science Institute* to generate software simulation files that produce Energy Rating Index in conformance with Zero Energy Ready Home Certification Protocols and referenced standards.

Zero Energy Ready Home Verifier: a person credentialed by the *Building Science Institute* to perform verifications on homes and apartments through Zero Energy Ready Home Certification Protocols and referenced standards, and includes both field verification and software analysis.

Approved by the Building Science Institute, Ltd. Co. Quality Council on December 13, 2022.

Approve: Amber Wood, Brian Christensen, Erik Straite, Kevin Burk, Wes Davis

Reject: None

Not Voting: Brett Dillon, Chair

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