

Building Science Institute, Ltd. Co. Process 006-2023 Assessment Report

This process applies to the Building Science Institute, Ltd. Co. True North Quality Management Services.

Related policies:

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

The assessment report must provide a clear, concise, complete, and accurate record of the assessment and include the following:

- The assessment objectives
- The assessment scope
- Identification of the verification organization
- Identification of the Building Science Institute's True North Quality Management Services assessment team and verification organization's participants in the assessment
- The dates and locations where the assessment activities were performed
- The assessment criteria
- The assessment findings and related evidence
- The assessment conclusions
- A statement on the degree to which the assessment criteria have been fulfilled

The assessment report may also include the following:

- The assessment plan including the assessment schedule
- A summary of the assessment process, including any challenges which may decrease the reliability of the assessment conclusions
- Confirmation that assessment objectives have been achieved within the assessment scope according to the assessment plan
- Identification of areas of the scope not covered by the assessment
- A summary of the assessment conclusions and the main assessment findings that support them
- Any unresolved diverging opinions between the True North QMS assessment team and the verification organization
- Opportunities for improvement
- Good practices identified during the assessment
- Agreed upon follow-up plans, if any
- A statement of the confidential nature of the report
- Any implications for the assessment program or subsequent assessments
- The distribution list for the assessment report

The assessment report must be reviewed and approved by the True North QMS lead assessor and the True North QMS assessment program manager.

The assessment report must be distributed to the verification organization who authorized the assessment.

The assessment report must be distributed to the ENERGY STAR® New Homes, Indoor airPLUS, and Zero Energy Ready Home teams.

The Building Science Institute must retain a copy of the report for at least 3 years. With the verification organization's permission, the report will be published on the Building Science Institute website. After 3 years of participating in the Building Science Institute's Home Certification Organization program, the conformity assessment reports must be published on the Building Science Institute website.

Each member of the True North QMS assessment team may retain a copy of the report.

The Building Science Institute will ensure the retention of certification documentation, including verification records, related to the ENERGY STAR®, Indoor airPLUS, Zero Energy Ready Home Certification Protocols for a minimum of three years. This includes all conformance assessment reports and supporting documentation.

The Building Science Institute shall maintain a database of ENERGY STAR®, Indoor airPLUS, and Zero Energy Ready Home certified homes and apartments through HouseRater software. The database will include at a minimum the energy simulation file data, photo documentation, field verification records.

HouseRater shall provide a database that has a public interface that accepts queries based on physical address and reports the current ENERGY STAR®, Indoor airPLUS, and Zero Energy Ready Home certification status; certification date; ERI score; ENERGY STAR® ERI Target; Zero Energy Ready Home ERI Target; builder or developer partner name; verifier name; software analyst name; verification organization; software version number; and ENERGY STAR®, Indoor airPLUS, and Zero Energy Ready Home version numbers.

The Building Science Institute shall provide the EPA ENERGY STAR® New Homes, Indoor airPLUS, and DOE Zero Energy Ready Home teams with quarterly summary reports of the number of homes and apartments certified through our certification program, by geographic location, builder or developer partner name, and verification organization.

Upon request, the Building Science Institute shall provide the ENERGY STAR® New Homes, Indoor airPLUS, and Zero Energy Ready Home teams with aggregate/summary information about the energy efficiency features used to build homes and apartments certified through our Certification Program.

Approved by the Building Science Institute, Ltd. Co. Quality Council on April 24, 2023

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

Reject: None

Not Voting: Brett Dillon, Chair; Wes Davis

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