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Building Certifier Scope of Services

A North American Certifiers Circle Guidance



Acknowledgments

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Passive House Certification

Over thirty years of experience demonstrate that the high levels of comfort and energy savings associated with the Passive House standard are achieved through independent quality testing. All certified Passive House buildings (including Classic, Plus, Premium, EnerPHit, and the PHI Low Energy Building standards) undergo a rigorous compliance process. Certification is also available for specific components, Designers, Consultants, and Tradespeople.

The North American Certifiers Circle (NACC)

The NACC is composed of individuals who have been internationally accredited by the Passive House Institute (PHI) to certify Passive House buildings, EnerPHit retrofits and PHI Low Energy Buildings anywhere in the world on behalf of the Passive House Institute and in accordance with their criteria. A list of active participants in the NACC that offer certification services provided by an accredited Passive House Certifier can be found on the Passive House Network website (<https://passivehousenetwork.org/certification/>), and the comprehensive list of all Passive House certifiers worldwide is available on the Passive House Institute's [website](#).

Scope of Services Template

This template is meant to support clear communication between client and certifier, outlining what services are required to certify a building to Passive House Institute standards. The template is to be a scaffold, adaptable and applicable to various project types and scales. **An editable copy of the templates can be downloaded [here](#).**

Specific project requirements and contractual agreements may require adjustments and additions to this generic scope of services. It is crucial to consult with a Certified Passive House Designer/Consultant/Tradesperson* and Passive House Certifier to tailor the scope to the specific needs and requirements of each project. Their expertise will help navigate the intricacies of the certification process and ensure the successful delivery of a Passive House project.

The Certifier's building certification review service is not in lieu of, but in addition to, the special Passive House design and construction advice the Certified Passive House Designer/Consultant/Tradesperson provides. The Certified Passive House Designer/Consultant/Tradesperson is responsible for preparing the PHPP energy model, which is the basis for building certification.

Collaboration and communication among all project stakeholders are vital for the effective delivery of a Passive House project and the successful achievement of Passive House certification.

* Single-family homes and other small projects may not require a Certified Passive House Designer or Consultant if a qualified Certified Passive House Tradesperson is consulting and completing the PHPP.

TABLE 1 Core Scope of Services

Project Stage	Item	Activity	Notes
1 PRELIMINARY REVIEW (SD/DD Phases)	1.1 Certification Process	1.1.1 Confirm certification approach with consultant (and Passive House Institute (PHI) if required) including verifying climate data set, number of PHPPs and general boundary conditions.	
		1.1.2 Establish a list of planned meetings.	
		1.1.3 Issue initial list of submittals required for Design Stage Review.	
		1.1.4 Issue file structure for collating design and construction submittals.	
		1.1.5 Set up the project on the PHI portal (https://certification.passivehouse.com/) or alternative methods to store information and ensure the team is clear on how to use it.	
	1.2 Initial Review	1.2.1 Review early-stage design information, PHPP, DesignPH, and supporting calculations to verify against Passive House certification criteria.*	
1.2.2 Identify recommended specific design submittals and review design submittals provided.			
1.2.3 Review assumptions made in the absence of design submittals.			
2 DESIGN STAGE REVIEW (CD Phase)	2.1 Design Review	2.1.1 Compliance review of pre-construction information with the Passive House criteria.	The Design Stage Review assessment will begin when most of the submittals are provided. Once the assessment against the Passive House criteria has been undertaken, further iterations are not included. To allow time to make any necessary adjustments, and avoid change orders, the Design Stage Review should be completed prior to the award of construction contracts.
		2.1.2 Review the agreed-upon number of thermal bridge calculations.	
		2.1.3 Review of the airtightness testing plan and the ventilation commissioning plan.	
		2.1.3 Review the energy balance calculation in PHPP.	
		2.1.4 Review of dynamic modeling for summer comfort for projects where this modeling is required by Building Standards.	
		2.1.5 Review summer stress test in PHPP for buildings without active cooling.	
	2.2 Feedback	Feedback with detailed technical findings include providing: 2.2.1 Feedback on the likelihood of certification 2.2.2 Outstanding information 2.2.3 Assumptions 2.2.4 Risks to certification	Should the Design Stage Review identify issues that need to be corrected, the Certifier can provide a further review as an Additional Service
2.3 Assurance Letter	2.3.1 Issue a Design Assurance Letter upon request.	Conditionally indicates as-designed building can be certified.	

	2.4 Verification Plan Review	2.4.1 Review the proposed Verification Plan.	
3 CONSTRUCTION REVIEW & QUALITY ASSURANCE (CA Phase)	3.1 Construction Submittals	3.1.1 Provide project-specific construction submittal register	
	3.2 Quality Assurance	3.2.1 Review certification submittals provided by Passive House Designer/Consultant.	
		3.2.2 Review of duct leakage testing and ventilation pre-commissioning results.	
		3.2.3 Provide feedback, including highlighting key risks to obtaining certification	
4 AS-BUILT ASSESSMENT (CA Phase)	4.1 Complete PHPP Verification	4.1.1 Review final PHPP. Passivhaus designers should provide a final PHPP to the Passive House Certifier, updated to reflect construction information: - final airtightness test result - ventilation commissioning - space heating & cooling - domestic hot water system commissioning - changes during construction	
5 CERTIFICATION (CA Phase)	5.1 Completion & Processing	5.1.1 Passive House certifiable projects: Coordinate with PHI to obtain certificate-ID	*Certifier may provide a letter confirming performance achieved upon request.
		5.1.2 Non-certifiable projects: In some instances the project may not be certifiable to any of the Passive House standards. In this case, the client will be informed, and no further action will be taken by the Certifier.*	
		5.1.3 Upload project information to the Passive House Database .	
	5.2 Certification Documents	5.2.1 Provide Passive House certificate and documentation.	
		5.2.2 Provide Passive House plaque.	

TABLE 2 Optional Additional Scope of Services

Project Stage	Item	Activity	Notes
Additional Services may occur across project stages	6 Additional Technical Support	6.1 Support on the general process. 6.2 Design feedback. 6.3 Design/construction workshops. 6.4 Verify design/specification changes. 6.5 Collation of information. 6.6 Work related to unique design challenges such as commercial kitchens, pools, hospitals etc... 6.7 Coaching of team members*	* Targeted coaching of team members on thermal bridge calculations, PHPP, or other optimization aspects can help rapidly increase team experience and expertise.
	7 Additional Design Stage Reviews	7.1 Further review of corrections submitted addressing deficiencies identified in previous Design Stage Review.	

	8 Site visits	8.1 Site inspection visits. The number and timing of visits are to be agreed upon with the site team.	Passive House quality control is managed by the contractor & Passive House Designer/Consultant (not the Certifier). Certifier site visits are not required for certification.
	9 Thermal Bridge Calculation Review	9.1 Review of 3D thermal bridges.	
	10 Dynamic hygrothermal moisture calculation review	10.1 Review of WUFI modeling.	
	11 Blower Door Testing	11.1 Carry out blower door testing.	
	12 User guidance	12.1 Support in preparing User Guidance documentation.	
	13 Other Certifications	13.1 When certifications such as LEED, Zero Energy Ready Home, Energy Star, Indoor airPLUS, RESET Air, Living Building, and WELL are being sought, further support may be provided in regard to information sharing and feedback.	

The Passive House Network is a national non-profit focused on Passive House training, knowledge sharing, and community, to scale high-performance Passive House building capacity across the US.