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WaterSense® Professional Certification Program

Draft Labeling System and Draft
Revised Specifications

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Housekeeping

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- Please type questions into the chat box on the lower right-hand side of your screen.
- To participate in an open discussion at the end of the call, press *6 to un-mute your line (press *6 to re-mute your line).
- This PowerPoint presentation will be posted on the public website following the call

Meeting Objectives

- Explain changes to irrigation partnerships.
- Review the draft labeling system and revised draft specifications documents in detail.
- Introduce new application forms and explain the professional certifying organization (PCO) application process.
- Obtain feedback from stakeholders on draft documents and answer questions.

Agenda

- Part I: Introduction to WaterSense
 - Overview of existing program
 - Background on program changes
- Part II: Changes to irrigation partnerships
- Part III: Draft labeling system and draft revised specifications
- Part IV: Next steps and Discussion

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Part I: Introduction to WaterSense

- What Is WaterSense?
- WaterSense Focus
- Where We Are Today
- What's Changing?
- What Prompted These Changes?

Amber Lefstead, EPA

What Is WaterSense?

WaterSense is a voluntary partnership program sponsored by the U.S. Environmental Protection Agency (EPA).

- Both a label for products and an information resource to help people use water more efficiently
- Aims to increase the adoption of water-efficient products, new homes, and services by consumers and organizations

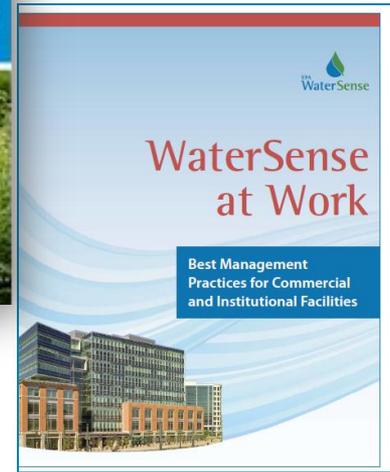




WaterSense Focus - 3 P's



**Right plant,
Right place,
Right
amount of
water**



**Weather-based
Irrigation controllers**



**Programs to certify
Irrigation professionals**



Where We Are Today

- WaterSense Labeled Certification Programs
 - 3 specs (irrigation design, installation & maintenance, auditing)
 - 9 labeled programs
 - 18 PCO partners
- Irrigation Partners
 - 1,400+ certified professionals have partnership agreements
 - Renew certifications every 1-2 yrs with proof of continued ed
- Certified Professionals
 - 4,200+ certified through WaterSense labeled programs
 - Approximately 30% have joined WaterSense as partners

What's Changing?

WaterSense is undertaking two primary changes to its professional certification program:

1. Modifying how WaterSense engages with irrigation professionals by removing the WaterSense partnership designation for individuals certified through WaterSense labeled programs
2. Instituting a new and consolidated set of requirements (i.e., program labeling system) that complements and streamlines each of the WaterSense program specifications



What Prompted These Changes?

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- WaterSense aims to review/revise specifications every three to five years.
- WaterSense identified several challenges while evaluating the certification program, program specifications, and irrigation partnerships.
- We saw a need to streamline our existing specification requirements to allow for future program growth.
- We saw the need to improve coordination with PCOs and irrigation professionals and improve coverage/availability of certified irrigation professionals.

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Part II: Changes to Irrigation Partnerships

- Changes Affecting Certified Professionals
- Changes Affecting Irrigation Partners
- Using the Promotional Label
- Benefits to Certified Professionals
- Implementation Timeline
- Question & Answer

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Changes Affecting Certified Professionals

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- Phasing out partnerships with individual irrigation professionals [Tentatively July 2014]
- Extending benefits to all professionals certified through WaterSense labeled programs [Tentatively July 2014]
- Engaging PCOs with new responsibilities:
 - Communicating with certified professionals about WaterSense
 - Tracking individuals' certification status
- Focusing more program resources on developing opportunities and materials for certified professionals
- Resources permitting, expanding the program to other types of professional certification programs (e.g., additional outdoor sector and plumbing professionals)

Changes Affecting Irrigation Partners

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- Certified professionals can use the WaterSense **promotional label** in place of the WaterSense **partner logo**.
- The phrase “WaterSense irrigation partner” will be replaced with “professionals certified through a WaterSense labeled program.”
- Certified professionals will be listed on their respective PCOs’ websites rather than the WaterSense partner directory.



Using the Promotional Label

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Irrigation Company

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look for WaterSense Meets EPA Criteria

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COMPANY LOGO

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Benefits to Certified Professionals

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- All professionals certified through a WaterSense labeled program will have access to:
 - WaterSense’s new and existing promotional materials
 - Access to work opportunities for WaterSense New Homes programs, federal facilities, and LEED® projects
- WaterSense will work to educate green building programs and state and municipal code authorities which specify that irrigation system work be performed by WaterSense irrigation partners

Implementation Timeline

September 2013

- EPA releases a draft labeling system and draft revised specifications.

April 2014

- PCOs prepare online listings of certified professionals.

July 2014

- EPA releases final labeling system and specifications, and the transition period begins.
- PCOs launch online listings of certified professionals.
- The phrase “irrigation partners” is removed from WaterSense partner directory.
- Certified professionals use WaterSense promotional label.

July 2015

- The labeling system is fully implemented.
- PCOs and certification programs must comply with system to remain partners and use label.



Question & Answer

Please type questions and comments into the chat box

Part III: Draft Labeling System

- Background and Purpose
- Effective Date
- PCO Types
- Paths and Requirements
- Applications, Roles, and Responsibilities
- Revised Draft Specifications
- Proposed Timeline
- Discussion Questions

Background

- Objective: Implement a consolidated and common set of general requirements that will be applicable to all PCOs.
- Draft documents available for review:
 - *WaterSense Professional Certification Program Labeling System*
 - Three revised draft specifications (Appendix A):
 - *WaterSense Specification for Irrigation System Installation and Maintenance Certification Programs*
 - *WaterSense Specification for Irrigation System Designer Certification Programs*
 - *WaterSense Specification for Irrigation System Auditor Certification Programs*
 - Three applications (Appendix B)



Purpose



- Define the organizational requirements that PCOs must meet to earn the WaterSense label for a certification program.
- Define respective roles and responsibilities of PCOs and WaterSense.
- Outline the application process for PCOs seeking the WaterSense label for a certification program.
- Improve consistency in how WaterSense evaluates professional certification programs.
- Ensure a base level of organizational competency regardless of the type of professional certification applying for a WaterSense label.

Effective Date

- Current PCOs shall be in compliance with Version 1.0 of the program labeling system **within one year** from the effective date (tentatively July 2014).
- If not in compliance by one year after issuance of the final labeling system (tentatively July 2015), the PCO must cease using the label in conjunction with its certification program.

PCO Types

EPA Approved PCOs

- apply directly to EPA for:
 - Organizational approval (through either accreditation **or** non-accreditation path)
 - The WaterSense label for their professional certification program

Adopting PCOs

- use or “adopt” an existing professional certification program that has already earned the WaterSense label.
 - The PCO that provides the labeled program for adoption is called the “Parent PCO”



General Eligibility Requirements



- All PCOs must:
 - Meet the eligibility requirements for EPA Approved PCOs (Section 5.2) **or** for Adopting PCOs (Section 5.3)
 - Be responsible for the impartiality of their professional certification program activities and not allow commercial, financial, or other interests to compromise their impartiality

Paths for EPA Approved PCOs

Accreditation Path

- PCOs can submit to EPA a certificate of accreditation that demonstrates they meet either:
 - ISO/IEC 17024, Conformity Assessment—General Requirements for Bodies Operating Certification of Persons
 - ST10, National Commission for Certifying Agencies' Standards for the Accreditation of Certification Programs

Non-Accreditation Path

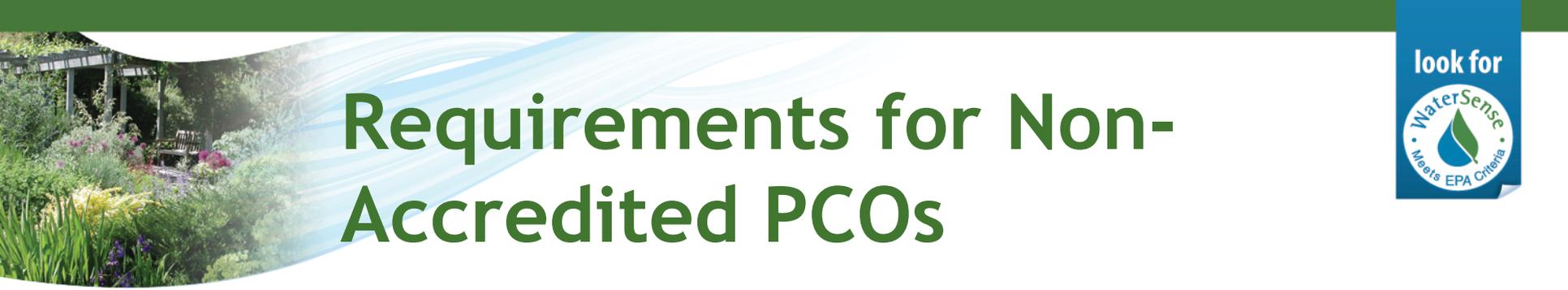
- PCOs can submit to EPA documentation demonstrating they meet the eligibility requirements described in Section 5.2.2

Requirements for Non-Accredited PCOs

- PCOs must demonstrate organizational competency in the following areas:
 - New
 - Institutional stability (5.2.2.1)
 - Subcontracting responsibility (5.2.2.2)
 - Procedures to revoke certification from certified professionals (5.2.2.7)
 - Existing
 - Independent oversight of certification program development and management (5.2.2.3)
 - Management of certified professionals' eligibility requirements (5.2.2.4)
 - Procedures for development and maintenance of certification exams (5.2.2.5)
 - Security of assessment instruments (5.2.2.6)

Requirements for Non-Accredited PCOs

- New Requirements for Non-Accredited PCOs
 - Institutional stability (5.2.2.1)
 - Sufficient personnel resources
 - Management structure responsible for:
 - Evaluation and certification decisions
 - Procedures relating to the certification of persons
 - Certifying organization management, including finance, personnel and records
 - Delegation of authority to undertake defined activities on its behalf
 - PCO shall be a legal entity or part of a legal entity

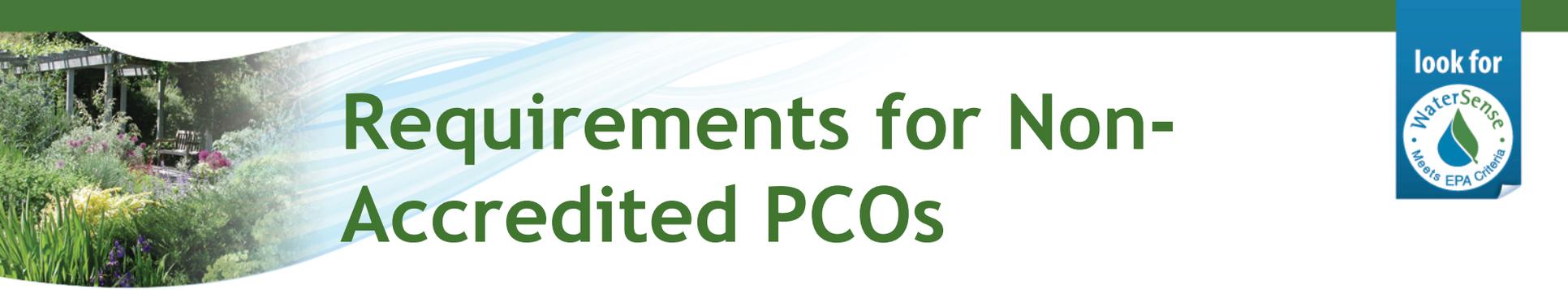


Requirements for Non-Accredited PCOs

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- New Requirements for Non-Accredited PCOs
 - Subcontracting responsibility (5.2.2.2)
 - PCO may contract with another organization; however, the PCO shall take responsibility for the contracted work and shall maintain ultimate responsibility for all certification-related decisions
 - PCO shall have a legally binding contract in place that ensures contractor competency, secures confidentiality, and prevents a conflict of interest



Requirements for Non-Accredited PCOs

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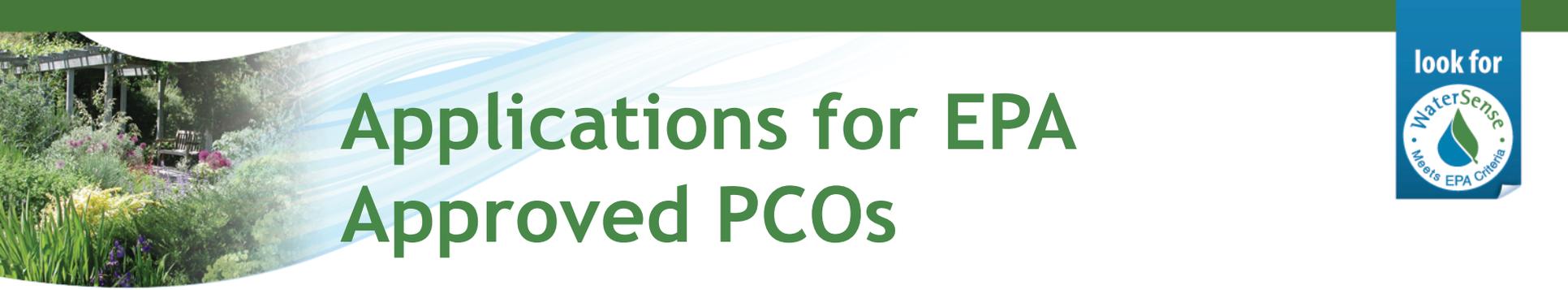


- New Requirements for Non-Accredited PCOs
 - Procedures to revoke certification from certified professionals (5.2.2.7)
 - PCO shall have procedures in place for implementing disciplinary actions, which include handling complaints and defining the terms and conditions for suspending or withdrawing the certification

Requirements for Adopting PCOs



- Adopting PCOs must demonstrate organizational competency in several areas:
 - Institutional stability (section 5.2.2.1)
 - Subcontracting responsibility (section 5.2.2.2)
 - Management of certified professionals' eligibility requirements (section 5.2.2.4)
 - Security of assessment instruments (section 5.2.2.6)
 - Procedures to revoke certification from certified professionals (section 5.2.2.7)
- These are requirements that reflect the different role of an Adopting PCO, that are not a function of the EPA approved PCO.



Applications for EPA Approved PCOs



- *Application for PCO Approval*
 - The mechanism all PCOs use to demonstrate the eligibility requirements have been met
 - Only submitted one time (in most cases)
- *Application to Label a Professional Certification Program*
 - The mechanism PCOs use to request the WaterSense label for a certification program
 - Once completed, demonstrates that all WaterSense program specification criteria have been met
 - Includes two letters of recommendation

Applications for EPA Approved PCOs

- PCOs seeking EPA approval complete 1) an application for PCO approval; 2) an application to label a professional certification program; 3) a partnership application.

Apply to EPA to be an EPA Approved PCO (Application for PCO Approval)

- Provide required supporting documentation **OR** if accredited under ISO/IEC17024 ST10 provide certificate of accreditation (see sections 5.2.2 or 6.1)

Apply to EPA for approval of professional certification program (Application to Label a Professional Certification Program)

- Submit required documentation in accordance with relevant WaterSense specification

EPA and EPA Approved PCO each sign WaterSense partnership agreement.

Applications for Adopting PCOs

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- PCOs that intend to offer a certification program for adoption should notify EPA beforehand.
- Parent PCOs must provide an application to Adopting PCOs that will document all requirements in Section 5.3.

Adopting PCO completes/submits application to Parent PCO.

Parent PCO reviews/notifies Adopting PCO when requirements have been met.

Adopting PCO completes/submits *Application for PCO Approval* to EPA.

EPA and Adopting PCO each sign WaterSense partnership agreement.

Authorization to Use the WaterSense Label

- EPA will evaluate PCO's application forms and documentation to determine if the PCO meets the relevant requirements.
- EPA will notify the PCO of its determination.
- If all requirements are met, EPA will provide the PCO with:
 - WaterSense label artwork
 - Letter of approval authorizing the PCO to use the label in association with that specific labeled program



EPA Approved PCO Roles and Responsibilities

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- Report to WaterSense:
 - Any material changes in organization and/or WaterSense labeled program structure
 - Annual program activity and statistics
- Communicate with certified professionals about WaterSense.
- Maintain a publicly accessible online listing of certified professionals.
- Adhere to the *WaterSense Program Mark Guidelines*.



Parent PCO Roles and Responsibilities

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- Review the *Application for Adopting Professional Certifying Organizations*.
 - Notify the Adopting PCO when the *Application for Adopting PCOs* has been approved **or**
 - Inform the Adopting PCO of any programmatic changes that the Adopting PCO will need to implement to secure approval
- Notify WaterSense if an Adopting PCO no longer meets the requirements of the program labeling system.

Adopting PCO Roles and Responsibilities

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- Complete the Parent PCO's application for Adopting PCOs and submit to the Parent PCO for approval
 - Once approved by Parent PCO, submit *Application for PCO Approval* to EPA
- Offer the WaterSense labeled certification program as was originally approved by EPA without modification to relevant aspects, such as the exam content and processes for administering and grading exams.
- Implement any changes to the certification program as directed by the Parent PCO.

EPA Roles and Responsibilities



- Review PCO application documents and determine organizational eligibility.
- Review PCO application documents and determine if the certification program meets the relevant WaterSense program specification.
- Provide the WaterSense label and sign PCO WaterSense partnership agreements.
- Provide PCO partners with information for certified professionals.
- Monitor use of the WaterSense label.
- Work to increase awareness of the WaterSense brand.
- Provide PCOs with public recognition.
- Review and approve organizational or program changes as necessary.
- Review organizational and certification procedures.
- Link to PCO partners' lists of certified professionals.

Program Disqualification

- EPA or its agent can conduct routine assessments of all policies and procedures relating to the certification of individuals under any labeled programs.
- EPA can suspend or withdraw the WaterSense label for a variety of reasons (e.g., nonconformance with a specification).
- Label use is described in the *WaterSense Program Guidelines* and the *WaterSense Label Use Guidelines*.

Amendments

- EPA reserves the right to amend the rules of procedure regarding program labeling by:
 - Revising the program labeling system
 - Revising any of the WaterSense program specifications
 - Issuing technical clarifications
- Types of Revisions
 - Major (e.g., exam requirements)
 - Minor (e.g., clarifying language)
- EPA will notify stakeholders when revisions are considered major or minor and carry out a public process as appropriate.



Draft Revised Specifications

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- Draft specifications only include criteria specific to the program area.
 - All other criteria are now in the program labeling system.
- Two substantive changes impact all three program specifications:
 - Exams required to address WaterSense labeled products
 - 50 percent of a labeled program's continuing education requirements must pertain to water efficiency

Proposed Timeline

January 2014

- EPA hosts on-boarding conference call with PCO partners.

April 2014

- EPA provides PCOs with preview of final labeling system and specifications.
- PCOs prepare online listings of certified professionals.
- PCOs may begin applying under new system.

July 2014

- EPA releases final labeling system and specifications, and transition period begins.
- PCOs launch online listings of certified professionals.
- WaterSense links to PCOs' online listings.

July 2015

- The labeling system is fully implemented.
- PCOs and certification programs must comply with system.
- WaterSense website lists only approved PCOs.

Discussion Questions

Please type questions and responses into the chat box

- Is the transition time of one year achievable for existing PCOs to become organizationally approved and earn the label for at least one professional certification program?
- How should a PCO demonstrate that 50 percent of its labeled program's continuing educational requirement pertain to water efficiency? What types of continuing education should qualify?
- Should the experiential or exam content requirements outlined in the three draft revised specifications be modified?

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Part IV: Next Steps and Open Discussion

- Next Steps
- Open Discussion
- Contact Information

Amber Lefstead, EPA

Next Steps

- WaterSense seeks feedback on all concepts and topics in the draft labeling system and revised draft specifications.
- WaterSense **specifically** requests written feedback on several questions listed in the cover letter.
- Send feedback to watersense-programs@erg.com before **November 19, 2013**.

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Open Discussion

Please type questions into the chat box or unmute your line by pressing *6 to participate in an open discussion

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Contact Information



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