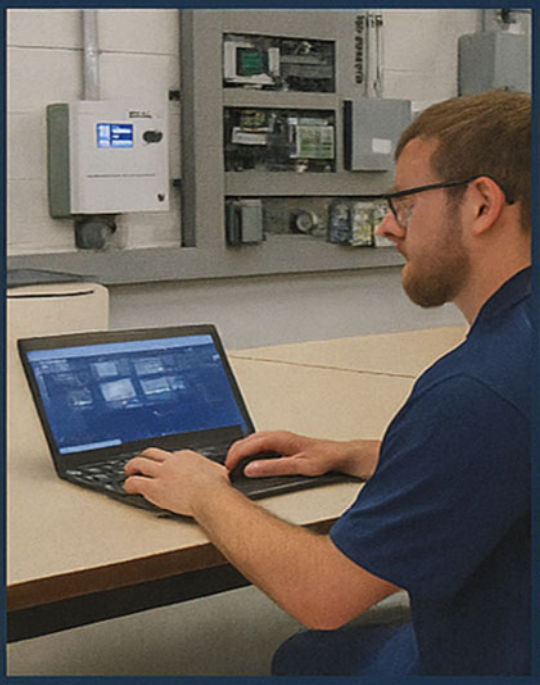
HVAC Excellence®

ACCREDITATION STANDARDS



HVACR • BUILDING AUTOMATION • GREEN MECHANICAL

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Accreditation

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ACCREDITATION

Accreditation, a non-governmental, peer-reviewed process, serves as a benchmark for excellence by evaluating programs against established academic and industry criteria.

Accreditation serves to confirm that a program has satisfied the accreditation standards set forth in the HVAC Excellence Accreditation Standards Manual (Standards 1–9). It is limited to verification of compliance with HVAC Excellence standards, and does not extend to compliance with federal, state, or local codes, laws, or regulations. Such compliance remains the sole responsibility of the institution.

HVAC Excellence reserves the right to amend, update, or withdraw standards at any time.

It is important to note that there are two distinct types of accreditations: Institutional and Programmatic.

Institutional Accreditation	Institutional accreditation assesses the comprehensive quality and effectiveness of an entire academic institution, encompassing governance, administrative leadership, financial sustainability, and overall institutional capacity. It is often requisite for eligibility in federal Title IV financial aid programs.
Programmatic Accreditation	Programmatic accreditation, pursuant to the provisions of 34 CFR Part 602, focuses on the academic rigor, curricular integrity, and workforce alignment of a specific program of study. This independent, systematic review ensures that program graduates possess the requisite knowledge, competencies, and professional readiness demanded by the related sectors.

HVAC Excellence offers programmatic accreditation in these disciplines:

- Heating, Ventilation, Air Conditioning, and Refrigeration (HVACR)
- Building Automation Systems (BAS)
- Green Mechanical Systems (GMS)

Eligible Organizations

Secondary Institutions	High Schools
Post-Secondary Institutions	Community or Technical Colleges
Registered Apprenticeship Programs	Sanctioned by state agencies or the United States Department of Labor
Industry Training Centers	Organizations that provide specialized, workforce-focused education and training aligned with the needs of the industry. These are typically a collection of courses that lead to some type of occupational certificate or degree. Accreditation of the program affirms that they meet or exceed established standards.

Additional Information

If you have any questions about accreditation, we invite you to contact our team at (800) 394-5268.

APPLICATION & REVIEW PROCESS

The steps below outline the typical process and estimated timeline for achieving accreditation through HVAC Excellence. Depending on the organization's responsiveness, the process can be completed in as little as 90 days or take up to one year.

Step 1: Submit Application and Program Video	Submit your **application** and non-refundable accreditation fee to ESCO Institute Ltd. In addition to the application, provide a narrated program video. The video should showcase the program's laboratory facilities, highlighting the diversity of equipment, trainers, and workstations available in both indoor and outdoor labs. It must demonstrate the institution's safety measures, including fire extinguishers, eye wash stations, first aid kits, emergency cutoff switches, and mechanical exhaust systems. The video should also show the availability of tools, storage areas, training library, detailing available audio-visual equipment, books, slides, videos, and other instructional materials. Further, the video must present the classroom environment, focusing on layout and resources, and document the availability of student computers. Organizations seeking accreditation in multiple disciplines, a separate video must be submitted for each program. Submit your videos **here**.
Step 2: Team Member Assignment	Upon candidacy approval, HVAC Excellence will assign a dedicated team member to guide and support your institution throughout the accreditation process.
Step 3: Submit Self-Study	Complete and upload a self-study report via the HVAC Excellence **portal**. The review board will evaluate the self-study within approximately 45 days to determine readiness for an onsite visit.
Step 4: Onsite Visitation	If the self-study meets standards, HVAC Excellence will assign assessors to conduct an onsite evaluation. Most visits are completed in one day, but complexity or multiple programs under review may require more time.
Step 5: Final Determination	Following the onsite visit, assessors submit their findings to the accreditation review board for final evaluation. A decision is typically issued within 45 days.

Application for Accreditation

To apply for programmatic accreditation, **click here**.

Competency and Task List

HVAC Excellence provides instructors with access to our **competency and task list** that indicates and organizes the basic knowledge area and skills that need to be incorporated into each subject matter area of HVACR program.

ONSITE VISITATION PROCESS

This is a general outline of an onsite visitation. However, each type of accreditation **may vary depending on the structure of the organization.**

Morning Conference	This meeting provides an open discussion among all stakeholders (administrators, instructors, etc.) to meet with the assessors. It provides a forum to ask questions and better understand the onsite visitation process.
Administrative Staff	This conversation provides insights into factors that impact the program, such as program management, resources, facilities, and overall support from the administration.
	This discussion allows us to learn about your admission standards, student placement records, transcript management, maintenance of health records, assistance in transitioning from school to work, follow-up on employment outcomes, and the availability of financial aid resources for students.
Financial Services Interview	Discussions may cover topics such as the funding sources available to the program, student fees, the process of formulating the annual program budget, distribution of grants and Perkins funds, and other financial considerations relevant to each program's operations and sustainability.
Review Standards with Instructor	The assessor will meet with faculty, students, and members of the program advisory committee or joint apprenticeship training committee. During this time, they will visit the classrooms, laboratories, and storage areas, to validate all aspects of the self-study.
Exit Interview	Upon conclusion of the onsite evaluation, the assessors will once again meet with program instructor(s) and administrators. During this closing meeting, a summary of the assessor's findings will be discussed.
Final Determination	The HVAC Excellence Accreditation Review Board carefully evaluates the self-study(studies) and findings provided by the assessors to make a final decision regarding the accreditation status of each program seeking accreditation. This evaluation process typically takes up to 45 days.

Accreditation Fees

A non-refundable application fee of $500 must be submitted with the application. The remaining $1,500 is due after the self-study has been reviewed and accepted but prior to scheduling the onsite visit. Institutions seeking accreditation for additional programs must pay a fee of $1,000 for each additional program area (BAS, Green Mechanical, HVACR).

Following the completion of the onsite evaluation, the institution will be invoiced for additional expenses. These include a daily honorarium of $700 per assessor. Most onsite visits require two assessors and are typically completed in one day. However, depending on the complexity of the program, additional assessors or extended evaluation time may result in extra charges.

Travel expenses will also be invoiced and include actual costs for airfare, car rentals, fuel charges, personal vehicle mileage, baggage fees, airport parking, and transportation to and from the airport. Lodging and meal expenses incurred during the onsite visit will be billed based on actual costs.

If the institution cancels a scheduled onsite visit after an agreed-upon date, it will be responsible for any fees and expenses already incurred. A new onsite visit will not be scheduled until all cancellation-related fees have been paid in full.

TERMS OF ACCREDITATION

HVAC Excellence awards accreditation for full-time educational programs for up to six years. Organizations seeking accreditation in multiple disciplines may receive varying term lengths per program.

Compliance Corrections

Programs with identified compliance issues have 90 days to resolve them. If more time is needed, an implementation plan must be submitted by the organization. HVAC Excellence may expedite timelines and require re-inspections, with additional costs borne by the institution. Failure to comply may result in suspension.

Annual Reporting

Accredited programs must submit an **annual accreditation report** by December 1st each year. The purpose of this report is to document any significant changes and ensure the program remains compliant with **accreditation standards**. Examples of changes that should be reported include adjustments in instructional staff, curriculum updates, program hours, or the relocation of program laboratories.

If the annual report confirms continued compliance, the school will receive confirmation that its accreditation status remains active until the next annual reporting period or the accreditation expiration date, whichever occurs first.

Failure to submit the annual report by the deadline will result in a notice of non-compliance. The program will have thirty days to resolve the issue. If compliance is not achieved within this period, a letter will be sent to the school's chief administrator, notifying him/her of the intent to suspend accreditation. If the report is still not received after an additional fifteen days (forty-five days in total), the programs accreditation shall be suspended. Suspension includes the removal of the program's accredited status from the HVAC Excellence website, and the program must remove the accreditation logo from all literature and/or its website.

Programs are exempt from submitting an annual report during their first 12 months and their final 12 months of accreditation.

Disclaimer

HVAC Excellence reserves the right to refuse accreditation if it believes that such accreditation may negatively impact the integrity and purpose of the overall program, even if the program or institution meets the qualifications set forth above. In such exceptional circumstances, HVAC Excellence will refund the application fee to the applying program.

Definitions

Candidacy
Status granted after submission of the application, program video, and fee. Candidacy lasts one year, with a possible one-year extension for programs with extraordinary compliance challenges.

Notice
Issued when potential non-compliance is identified. Programs must respond within the designated timeframe or face suspension.

Suspension
Accreditation is suspended if a program fails to resolve compliance issues following a notice. Accreditation remains suspended until all issues are resolved.

SELF-STUDY INSTRUCTIONS

A self-study is a comprehensive collection of narratives and supporting documentation that indicates a program satisfies the standards.

Instructions for Self-Study Narratives	Provide detailed narratives as specified. A narrative is a comprehensive written description as to how the program complies with the standard. A narrative explains how you satisfy the standard. If applying for multiple disciplines (HVACR, GREEN, BAS), clearly label each narrative to specify the discipline it addresses. Number each narrative to match the relevant standard and sub-section for clear organization.
Instructions for Exhibits	An exhibit or evidence file may include forms, reports, photographs, letters, meeting minutes, handbooks, catalogs, or specific pages from these materials. If a single document (e.g., a handbook) supports multiple standards, submit one copy and reference the specific page numbers in your narrative. HVAC Excellence requires a permanent record of all exhibits. Web-based content must be printed or saved as a PDF, as website content can change over time. If you need clarification or have questions about the self-study process, please contact your assigned assessor.
Submission of the Self-Study	Completed self-studies for the program(s) seeking accreditation must be submitted through the HVAC Excellence **electronic portal**.

HVAC Excellence™

HVAC EXCELLENCE ACCREDITATION STANDARDS

Standard 1: Mission of the Program

1.1 Mission for Program Students
1.2 Program Mission and Description

Standard 2: Administrative Responsibilities

2.1 Student Achievement Records
2.2 Administration Support of the HVACR Program
2.3 The Institution's Requirements

Standard 3: Finances and Funds

3.1 Student's Fees
3.2 Annual Budget for HVACR Program
3.3 Formulation of Budget

Standard 4: Student Services

4.1 Pre-admission Procedures
4.2 Student Medical Information
4.3 Counseling
4.4 Student Transcripts
4.5 The School-to-Work Transition
4.6 Employment Follow-up Procedures

Standard 5: Instructional Design and Program Elements

5.1 Program Design
5.2 Students per Instructor
5.3 Specialized Training Plan
5.4 Safety
5.5 Work Ethics & Worker Characteristics
5.6 Student Progress
5.7 Lab/Shop Performance Standards
5.8 Student Assessments
5.9 Outside Work Projects (Live Work Orders)
5.10 Maintenance and Repair Reference Materials
5.11 References and Periodicals
5.12 Multimedia Materials and Equipment
5.13 HVACR Program Advisory Committee

Standard 6: Physical Facilities

6.1 Safety
6.2 Classroom and Office
6.3 Maintenance and Housekeeping
6.4 Shop/Lab Area
6.5 Tool Room and Storage Area
6.6 Restrooms

Standard 7: Equipment and Tools

7.1 Laboratory Equipment
7.2 Laboratory Tools
7.3 Hand Tools for Students
7.4 Supplies

Standard 8: Cooperative Training

8.1 Performance Standards

Standard 9: Instructor Qualifications

9.1 Qualifications
9.2 Continuation of Employment

STANDARD 1: MISSION OF THE PROGRAM

The mission of the program seeking accreditation must be clearly defined for each discipline and type of accreditation being sought (BAS, GMS, or HVACR).

Sub-Standard	Requirement
1.1 – Mission for Program Students	Students must be trained and educated to the levels outlined in the program's stated goals, demonstrating newly acquired skills. There should also be viable employment opportunities available in or near the program's service area for graduates or course completers.
1.2 – Program Mission and Description	The program must maintain a documented description that outlines student goals. This document must be available to all prospective students. A student handbook detailing tuition, fees, required clothing or safety equipment, textbooks, tools, and other pertinent information must be provided to each student during orientation, prior to program entry. Orientation must also cover local employment potential and the technical qualifications of the program's instructors for each discipline seeking accreditation.

Self-Study Instructions

Narrative Requirements:
Provide a narrative for each sub-section explaining how your program complies with the standard. Narratives should thoroughly describe how each requirement is met.

Required Exhibits

Exhibit 1	A copy of the program's mission statement. Indicate where (e.g., brochures, website, handbook) the mission statement is published or displayed.
Exhibit 1.A	A list of potential employers located in or near the program's service area. Include the names and addresses of companies that have hired or may hire program graduates/completers.
Exhibit 1.2	A copy of the current student handbook and/or catalog. If these materials are available online, provide both a PDF copy and the URL to confirm public access.

STANDARD 2: ADMINISTRATIVE RESPONSIBILITIES

The program's instruction and curriculum must effectively accomplish its stated goals and mission.

Sub-Standard	Requirement
2.1 - Student Achievement Records	Students must be awarded a certificate, diploma, or degree upon completion of the program or specified exit point. Records must clearly indicate the competency level(s) each student has achieved.
2.2 - Administrative Support of the Program	The program must have full support from the administration. Evidence of this support includes the provision of equipment, facilities, tools, training materials, special equipment, and supplies. Additionally, the administration must support and document any specialized training for new equipment and ongoing professional development for instructors.
2.3 - Institution's Requirements	Institutional policies covering attendance, violations, liabilities, safety, parking, and other relevant topics, must be provided to all students and staff involved in the program.

Self-Study Instructions

Narrative Requirements:
Provide a narrative for each sub-section explaining how your program complies with the standard. Narratives should thoroughly describe how each requirement is met.

If applying for accreditation in multiple disciplines, label each narrative and exhibit appropriately (e.g., BAS, GMS, or HVACR).

Required Exhibits

Exhibit 2.1	A sample diploma, certificate, degree, or transcript showing the competency levels achieved by students.
Exhibit 2.2	Line-item budgets for the current year and the two previous years.
Exhibit 2.2A	Executed purchase orders from the previous year for program equipment and supplies.
Exhibit 2.2B	Documentation of instructor professional development (e.g., seminars, classes, conferences, earned credentials).
Exhibit 2.3	Page references from the student handbook or catalog displaying institutional policies on attendance, violations, prohibitions, liabilities, safety, and parking.

STANDARD 3: FINANCES AND FUNDS

The organization must support the objectives and goals of the program(s) by providing adequate funding.

Sub-Standard	Requirement
3.1 - Student Fees	Programs supported by local governmental entities must provide necessary fees and materials required for student success. Programs not funded by governmental entities may require students to pay tuition or maintenance fees as set by the institution. Students are responsible for purchasing supplies, safety equipment, hand tools, and any special equipment listed in the student handbook if not provided by the school.
3.2 - Annual Budget for the Program	The institution must develop and implement an annual budget for the program(s). Instructors must be informed of all proper and legal purchasing procedures.
3.3 - Formulation of the Budget	It is the organization's responsibility to prepare the annual budget. Programs must submit a budgetary needs assessment prior to budget preparation. Programs must also receive periodic notifications regarding available funds.

Self-Study Instructions

Narrative Requirements:
Provide a narrative for each sub-section explaining how your program complies with the standard. Narratives should thoroughly describe how each requirement is met.

If applying for accreditation in multiple disciplines, label each narrative and exhibit appropriately (e.g., BAS, GMS, or HVACR).

Required Exhibits

Exhibit 3.1	A copy of tuition and maintenance fees, along with a list of tools and supplies students are required to purchase.
Exhibit 3.2	A copy of the current annual program budget.
Exhibit 3.2A	A copy of the institution's purchasing procedures.
Exhibit 3.3	A sample of a periodic budget notification sent from administration to instructional staff.

STANDARD 4: STUDENT SERVICES

Student Services or a similar administrative office must support students by maintaining records, administering pre-admission procedures, promoting job placement and interviews, conducting follow-ups, and providing post-completion transition assistance.

Sub-Standard	Requirement
4.1 - Pre-Admission Procedures	**Secondary Schools** Students must be pre-tested to assess reading, math, and language skills. **Post-Secondary & Apprenticeship Programs** Student Services must conduct interviews and accept or reject prospective students following submission of an official application. Pre-testing for reading, math, and language skills is required. **Industry Training Centers** The Training Center shall provide students an opportunity to self-disclose any existing medical condition(s) that may require special considerations or accommodations to ensure each student's success and safety. Medical information forms should document information for each student showing any or all allergies, medications, special medical information, and contacts in case of emergency.
4.2 - Student Medical Information	Students must be offered the opportunity to disclose any existing medical conditions that may require special accommodation. Medical forms should document allergies, medications, special medical information, and emergency contacts.
4.3 - Counseling	Counseling services shall be available for student counseling on a scheduled basis.
4.4 - Student Transcripts	The organization must maintain all student achievement records of completers or leavers. Student records must be stored digitally with a back-up in case of data loss. All records must be kept securely.
4.5 - School-to-Work Transition *(Not applicable to training centers)*	Student Services must assist instructors in promoting and implementing job placement support for completers and graduates.
4.6 - Employment Follow-Up Procedures *(Not applicable to training centers)*	Student Services must implement follow-up procedures to track employment success within one year of program completion. This data should be used to evaluate and refine the curriculum based on identified strengths and areas for improvement.

Self-Study Instructions

Narrative Requirements:
Provide a narrative for each sub-section explaining how your program complies with the standard. Narratives should thoroughly describe how each requirement is met.

If applying for accreditation in multiple disciplines, label each narrative and exhibit appropriately (e.g., BAS, GMS, or HVACR).

STANDARD 4: STUDENT SERVICES (CONTINUED)

Required Exhibits

Exhibit 4.1	An outline or brochure of the student orientation program.
Exhibit 4.1A	A list of assessment tests used for reading, math, and language skills, including minimum admission scores (if applicable).
Exhibit 4.2	A copy of the medical information form (with all personal information redacted), designation of the institution's ADA Coordinator, and evidence of accommodations discussed during orientation.
Exhibit 4.3	A copy of the published Student Services office hours for counseling.
Exhibit 4.4	A sample student transcript indicating the certificate, diploma, or degree earned (without any personal identifying information).
Exhibit 4.5 *(Not applicable to training centers)*	Copies of current employer and student follow-up surveys, including summarized response data (all personal information redacted).
Exhibit 4.6 *(Not applicable to training centers and secondary programs)*	A copy of your current employer and student follow-up surveys. Exhibits may include actual numbers for each response category or averages for each response category. If completed surveys are used as an exhibit, please redact all personal identifying information.

STANDARD 5: PROGRAM DESIGN

An organized and systematic instructional plan aligned with program goals must be implemented. Clear objectives and task assignments should form the foundation of this plan.

Sub-Standard	Requirement
5.1 - Program Design	The program must consist of a course or number of courses that lead to an occupational classification or field. The curriculum should be logically constructed and incorporate clearly defined tasks, objectives, and competencies. The curriculum should also integrate basic skills such as mathematics, reading, communication skills, teamwork concepts, and other relevant instruction necessary for successful completion and/or employment. The curriculum should be designed to address the workforce needs of the community. Additionally, students should be provided with a syllabus for each course they are enrolled in. **Secondary Schools** In addition, the curriculum should align with local post-secondary entrance requirements or facilitate articulation agreements.
5.2 - Student-to-Instructor Ratio	**During hands-on, potentially hazardous activities, students shall have direct supervision.** For purposes of this standard, the instructor or qualified laboratory supervisor must be physically present and able to maintain continuous observation of students engaged in laboratory activities. Such hazards include, but are not limited to, working with chemicals, energized equipment and components, fuels, refrigerants, high pressure vessels, open flames, rotating machinery, combustion processes, and other activities requiring direct safety supervision. **During potentially hazardous laboratory activities, the student-to-supervisor ratio shall not exceed 20:1**. If the number of students involved in potentially hazardous laboratory activities exceeds the 20:1 supervision ratio, the program shall provide additional qualified supervisory personnel capable of maintaining continuous observation and responding immediately to unsafe conditions or emergencies. For the purpose of this standard, students engaged solely in non-hazardous instructional activities include, but are not limited to reading, computer-based learning, simulations, and instrument familiarization **shall not be included in the active laboratory supervision ratio**. Programs shall maintain documentation demonstrating compliance with these supervision and safety requirements. Institutions are responsible for ensuring that laboratory environments comply with all applicable federal, state, and local safety regulations, including those established by the Occupational Safety and Health Administration and other relevant authorities.
5.3 - Specialized Training and Exit *(Does not apply to training*	Defined exit points must be available for students specializing in specific areas. Instructors must develop individualized training plans aligned with local employer needs.

Sub-Standard	Requirement
centers and apprenticeship programs)	
5.4 - Safety	Safety is of utmost importance and should be integrated into all aspects of the training program from the very start and incorporated throughout the duration of the program(s). During the first week of training, written comprehensive safety instruction should be provided, covering all safety rules and special practices relevant to the program. To ensure safety compliance, it is essential to provide and require the use of appropriate safety equipment such as eye protection and gloves. Before any student can operate or work on lab equipment, all safety instructions must be thoroughly administered. To reinforce the importance of safety, all students shall sign a statement indicating their understanding of the safety procedures covered in each safety lecture or exam. Records of these signed statements shall be maintained by the institution as defined by the institution's governing board policies, and/or local and state laws. It is suggested that if no law exist, these records be maintained as part of the student's permanent record file. This documentation serves as evidence of the students' acknowledgment and compliance with safety procedures.
5.5 - Work Ethics and Worker Characteristics	The development of high personal standards among students is an ongoing and integral aspect of their training. Students should be encouraged to adopt work ethics comparable to industry standards. The training program should incorporate the teaching of appropriate work ethics and worker characteristics throughout the duration of the training.
5.6 - Student Progress Reports	The progress of students in the training program should be consistently and continuously evaluated. Performance evaluations should be included in the student progress report. These progress reports should be provided to each student every grading period. In addition: **Secondary Schools** The grades or performance reports should be regularly forwarded to the sending school. **Training Center** Training centers need to provide a report card or certificate of completion upon passing a single or series of classes.
5.7 - Lab/Shop Performance Standards	Instructors must assign and document lab projects and performance evaluations with clear grading criteria. Students must demonstrate competency before advancing. **Training Center** Where in-person, laboratory requirements exist, they must meet the requirements of Standard 5.7
5.8 - Student Assessments/Student Learning Outcomes (SLOs)	**Secondary Programs (High Schools)** Secondary students must complete third-party, nationally recognized, closed-book examinations that provide an external, comparative measure of student learning outcomes (SLOs). This standard can be satisfied by administering a combined student outcome assessment, or entry-level certifications covering Air Conditioning, Electrical, and Heating. In addition, certification under Section 608 of the Federal Clean Air Act is strongly

Sub-Standard	Requirement
	recommended as it is required to handle regulated refrigerants. A copy of student achievements on these exams must be included in the annual accreditation report. **Postsecondary Programs and Industry Training Centers** Post-Secondary and industry training center students must complete third-party, nationally recognized, closed-book examinations that provide an external, comparative measure of student learning outcomes (SLOs). This standard can be satisfied by administering, or validating, that the students possess these certifications, and including evidence of the exams in the annual accreditation report. • **HVACR Programs:** Air Conditioning, Electrical, and one of the following: Gas Heat, Oil Heat, Electric Heat, Heat Pump, or Hydronics. In addition, they must take the EPA Section 608 Certification Exam. • **BAS (Building Automation Systems) Programs:** Building Automation Technology, Electrical Fundamentals, Air Conditioning, or Networking (minimum three required). • **GMS (Green/Mechanical Systems) Programs:** Duct and Envelope Testing, Heat Gain/Heat Loss, and one of the following: System Performance, Psychometrics, or Energy Auditing.
5.9 - Live Work Orders *(Not applicable to apprenticeship programs or training centers)*	Live work refers to repairs or services on equipment not owned by the school. Students must not receive monetary compensation. Administrative approval and appropriate documentation, including a work order and liability disclaimer are required.
5.10 - Maintenance and Repair Reference Materials	Service and installation information must be available for all lab equipment.
5.11 - Multimedia References and Periodicals	Programs must provide current multimedia references such as textbooks, periodicals, and computer-based resources. Materials must be cataloged, and all textbooks must be published within the last six years.
5.12 - Multimedia Equipment	Multimedia equipment must be available to enhance instruction.
5.13 - Program Advisory Committee	Programs must establish a Program Advisory Committee, (Joint Apprenticeship Training Committee for apprenticeships), composed of at least five members representing industry stakeholder, such as employers, program graduates, manufacturers, distributors, technicians, and contractors. The committee must meet twice a year, and once a year conduct a program efficacy review. This review evaluates the program length, courses offered, curriculum, number of faculty to student ratio, student completion rate, program cost, program funding, national test results, and provide feedback. The purpose of the meeting is to validate the program

Sub-Standard	Requirement
	content offered is staying current with industry changes. Each member shall complete an annual efficacy review form and sign it. Additionally, comprehensive minutes shall be taken to document areas of discussion, program changes, to provide a historical document of what changes were made and why.

Self-Study Instructions

Narrative Requirements:
Provide a narrative for each sub-section explaining how your program complies with the standard. Narratives should thoroughly describe how each requirement is met.

If applying for accreditation in multiple disciplines, label each narrative and exhibit appropriately (e.g., BAS, GMS, or HVACR).

Required Exhibits

Exhibit 5.1	A detailed copy of the curriculum.
Exhibit 5.2	Documentation of your student-to-instructor ratio.
Exhibit 5.3 *(Not applicable to apprenticeship programs training centers)*	A detailed copy of your established exit points for completers.
Exhibit 5.3A *(Not applicable to apprenticeship programs, training centers)*	A: A copy of the course outline/syllabus for any supplemental, part-time preparatory training provided within the past year.
Exhibit 5.4	A copy of the program safety training outline.
Exhibit 5.4A	A copy of your student statement of safety understanding.
Exhibit 5.4B	A copy of accident and injury reporting forms.
Exhibit 5.5	A copy of the forms used for student evaluations of attendance, tardiness, completion of assigned jobs, tasks, and lab projects.
Exhibit 5.6	A copy of the Student Progress Report.
Exhibit 5.7	A copy of the forms for evaluation of lab projects and performance testing.
Exhibit 5.7A	A copy of a job assignment used in performance testing.
Exhibit 5.8	A copy of a retained knowledge (written) exam.
Exhibit 5.8A	Documentation of program compliance with the national outcome assessment

	requirement.
Exhibit 5.8B	Evidence of how students receive EPA (Environmental Protection Agency) certification prior to completion for HVACR programs.
Exhibit 5.9	A copy of a live work order and disclaimer of liability. Apprenticeship programs do not accept outside projects, "live work," under any circumstances, therefore exhibit 5.9 does not apply.
Exhibit 5.10	A list and description of laboratory equipment available for training.
Exhibit 5.11	A catalog or list of all multimedia reference materials.
Exhibit 5.12	A list of multimedia equipment available for student training.
Exhibit 5.13	A copy of the last three advisory committee meeting minutes and agenda.
Exhibit 5.13A	A list of the advisory committee members. (Include names, addresses, phone numbers, and organizations represented.)
Exhibit 5.13B	A copy of the duties of the advisory committee.
Exhibit 5.13C	A copy of the advisory committee's last efficacy review.

STANDARD 6: PHYSICAL FACILITIES

The program's physical facilities must provide a safe, supportive learning environment that promotes achievement of program goals and mission.

Sub-Standard	Requirement
6.1 - Safety	Each laboratory must be equipped with accessible fire extinguishers, first aid kits, and eyewash stations. The location and operation of all safety equipment must be incorporated into the curriculum. All classrooms and laboratories must comply with applicable OSHA regulations and local fire codes. Facilities must provide at least 120 square feet of combined classroom and lab space per student.
6.2 - Classroom and Office	The program must designate a separate classroom area conducive to learning, with proper lighting, heating/cooling, and minimal noise/distractions. Essential teaching aids, such as a whiteboard, multimedia equipment, and reference materials, must be available. Students must have computer access, with at least one internet-connected computer for every three students where appropriate to the subject matter. The instructor must have a separate office for secure student records storage and private student conferences. Classrooms must be kept clean and orderly.
6.3 - Maintenance and Housekeeping	Good housekeeping and equipment maintenance practices must be consistently followed to support safety and provide a productive learning environment.
6.4 - Laboratory Area	Training labs must be well-lit, located near the classroom, and equipped with workbenches, training mock-ups, and necessary equipment. Due to the use of chemicals, labs must have a permanently installed mechanical exhaust system and a positive ventilation (make-up air) system in compliance with local codes. Laboratories must have necessary utilities, such as three-phase electrical power, natural gas, fuel oil, or LPG to support the curriculum. An emergency electrical shut off must be installed to disconnect power to all classroom electrical equipment and shut off the flow of combustible gases (natural gas, propane, etc.).
6.5 - Tool Room and Storage Area	A secure storage area adjacent to the lab must be available for storing tools, supplies, and special equipment. Additional storage areas may be designated for items not used daily.
6.6 - Restrooms	Restrooms must be conveniently located near the classroom and laboratory areas and must comply with ADA (Americans with Disabilities Act) requirements.

Self-Study Instructions

Narrative Requirements:
Provide a narrative for each sub-section explaining how your program complies with the standard. Narratives should thoroughly describe how each requirement is met.

If applying for accreditation in multiple disciplines, label each narrative and exhibit appropriately (e.g., BAS, GMS, or HVACR).

Required Exhibits:

No exhibits are required for Standard 6. Physical facilities will be evaluated during onsite visitation.

STANDARD 7: LABORATORY RESOURCES

To meet program goals and support its mission, training equipment and tools must be readily available. These must be equivalent in quality to those used in the industry. **The curriculum shall prescribe the equipment and tools required.**

A suggested list of equipment, tools and supplies can be found by scanning the QR code.

Sub-Standard	Requirement
7.1 - Laboratory Equipment and Resources *(Does not apply to online training)*	All programs seeking accreditation must have high-quality equipment and tools necessary for hands-on training and performance testing in the laboratory. The curriculum will determine the types and variations of equipment and tools needed. In addition to general requirements, discipline-specific standards apply.
7.2 - Laboratory Tools	Programs must provide high-quality tools necessary for training, ensuring that all students have access during lab sessions. The required furnishings, tools, and test equipment will be determined by the curriculum, with additional specifications for each discipline.
7.3 - Hand Tools for Students	Students should obtain necessary hand tools prior to graduation. Programs are encouraged to offer a tool purchase program to help students acquire tools at a reasonable cost. A tool list must be provided to each new student during orientation or by Student Services.
7.4 - Supplies	Supplies such as cleaning materials, towels, safety glasses, and ear plugs must be readily available. These supplies should also be made accessible for program guests. Each discipline has specific additional requirements.

Self-Study Instructions

Narrative Requirements:
Provide a narrative for each sub-section explaining how your program complies with the standard. Narratives should thoroughly describe how each requirement is met.

If applying for accreditation in multiple disciplines, label each narrative and exhibit appropriately (e.g., BAS, GMS, or HVACR).

Required Exhibits

Exhibit 7.1	A list of all lab equipment (trainers and live equipment).
Exhibit 7.1A	Prepare a short, but detailed, video of the program to include the classroom/s and lab area/s equipment and furnishings. Highlight trainers, training modules, training equipment, workstations, safety devices, fire extinguishers, tool room, exhaust systems, etc. The video does not need to be studio quality. A brief narrative as you video the program, classroom, and lab are appreciated but not required.
Exhibit 7.2	A copy of the "student tool purchase program" if applicable.
Exhibit 7.2A	A copy of the required student tool list.

STANDARD 8: COOPERATIVE TRAINING

Cooperative Training is not required. However, organizations offering corporative training such as job shadowing, on-the-job training, externships, or internships must meet the requirements outlined in Standard 8.

When cooperative training is offered, a legally binding written agreement must be signed by the student, employer, and organization.

Sub-Standard	Requirement
8.1 - Practicum Standards	All students participating in cooperative training must be supervised by an experienced instructor or workplace supervisor. The supervisor is responsible for conducting weekly evaluations, maintaining a log of the students' work activities, monitoring attendance, and tracking work progress. These evaluations must be submitted to the program instructor and retained by the institution for review and recordkeeping.

Self-Study Instructions

Narrative Requirements:
Provide a narrative for each sub-section explaining how your program complies with the standard. Narratives should thoroughly describe how each requirement is met.

If applying for accreditation in multiple disciplines, label each narrative and exhibit appropriately (e.g., BAS, GMS, or HVACR).

Required Exhibits:

Exhibit 8	Submit a copy of any cooperative training agreement used by the program.

STANDARD 9: INSTRUCTOR QUALIFICATIONS

Sub-Standard	Requirement
9.1 - Instructor Qualifications	Instructors (full-time and adjunct) must possess a minimum of five years of field experience directly related to the subject matter of their program's. They must meet all technical educational requirements established by state or local government or the authority having jurisdiction over the program. Instructors must demonstrate the ability to conduct demonstrations, provide clear explanations, and effectively communicate ideas, concepts, and theories across all curriculum areas. They are expected to uphold high ethical standards, exhibiting honesty, tactfulness, patience, and approachability. Instructors must also hold one of the following credentials: a certificate, diploma, associate degree, or bachelor's degree in the accredited discipline (BAS, GMS, or HVACR) or be a graduate of a state or Department of Labor approved apprenticeship program. ***Additional discipline-specific requirements include:*** **Building Automation** Instructors must hold certification or licensure in low-voltage controls or networking. **HVACR Programs** Instructors must hold a valid EPA Section 608 Universal Certification. ***If an HVACR instructor does not meet the above qualifications:*** **Full-time HVACR Instructors** must either hold the title of Certified Master HVACR Educator (CMHE) or be actively working toward the CMHE credential. Instructors must take at least two credentialing exams per calendar year and pass at least one exam annually. Full certification must be completed within five years. **Adjunct HVACR Instructors** must hold the title of Certified Subject Matter Educator (CSME) in each discipline they teach or be working toward earning the CSME credential. Adjuncts must take the necessary exams within one year and successfully complete them within two years.
9.2 - Continuing Education Requirements	Instructors must undergo an annual evaluation conducted by the school administration. Evaluations must review teaching methods, use of curriculum guidelines, and implementation of the approved curriculum. A minimum performance rating of "satisfactory" is required, and copies of these evaluations must be maintained in the instructor's permanent file. Students must complete written evaluations of their instructors prior to exiting the program. Instructors are required to earn a minimum of ten hours of continuing education each year (1 CEU = 10 continuing education hours). At least half of these hours must be in the technical field directly related to the program's curriculum. Continuing education should be provided by manufacturers, professional associations, or recognized subject matter experts.

Self-Study Instructions

Narrative Requirements:
Provide a narrative for each sub-section explaining how your program complies with the standard. Narratives should thoroughly describe how each requirement is met.

If applying for accreditation in multiple disciplines, label each narrative and exhibit appropriately (e.g., BAS, GMS, or HVACR).

Required Exhibits:

Exhibit 9.1	A copy of each instructor's Curriculum Vitae (CV).
Exhibit 9.2	A copy of each instructor's current certifications and licenses.
Exhibit 9.3	Copies of all degrees and/or diplomas held by each instructor.
Exhibit 9.4	Documentation of all continuing education hours (professional development) completed.
Exhibit 9.5	A copy of each instructor's annual evaluation.
Exhibit 9.6	A copy of the students' exit evaluations for each instructor

Teresa Pezzi
Executive Director, MSCA
tpezzi@mcaa.org

The contractor members of the Mechanical Service Contractors of America (MSCA) are constantly looking for new technicians to fill job vacancies nationwide.

Who is the MSCA? We are the leading national trade association for heating, air conditioning, refrigeration, plumbing and facility operations contractors representing companies such as Johnson Controls, Carrier Commercial, EMCOR, McKinstry, and over 1,200 other prominent members. We are a subsidiary of the Mechanical Contractors Association of America, an organization that represents over 2,600 mechanical contractors and top employers in North America.

We understand that you may have more job postings than students to fill. However, not all jobs are created equal! Our member companies offer career opportunities with:

- The potential to EARN up to six figure income per year
- Numerous BENEFITS including: Health Insurance, Pension Plans, Laptop Computers, Service Vehicles, Uniforms and more.
- Lifelong education with college credits, certification and degree programs
- A career with unlimited opportunity for GROWTH and ADVANCEMENT!

We recognize the importance of a good education for tomorrow's HVAC service technician. If your program has been accredited by HVAC Excellence and your students have passed their HVAC Excellence Employment Ready Certifications, our 1,200 member contractors can fast track your students to a higher entry level as a result of these credentials. It is the job of every school to get their students the best jobs possible. MSCA members offer career placement opportunities that are hard to match.

Sincerely,

Teresa Pezzi
Executive Director, MSCA

Articulation Agreement

Between HVAC Excellence and the United Association for Advanced Placement in an HVACR Apprenticeship Program

Administered by a Local Union of the United Association of Journeymen and Apprentices of the Plumbing and Pipefitting Industry of the United States and Canada.

Articulation Agreement

This Articulation Agreement is entered into between the United Association of Journeymen and Apprentices of the Plumbing and Pipefitting Industry of the United States and Canada (UA) and HVAC Excellence.

This agreement shall become effective on August 15, 2026, and shall remain in effect until terminated by either party upon written notice.

Purpose

The purpose of this agreement is to establish an advanced placement pathway into a United Association Local Union HVACR apprenticeship program for qualified applicants who meet the following requirements.

Eligibility Requirements

Applicants seeking advanced placement under this agreement must meet all of the following criteria:

1. **Program Completion**
   The applicant must be a graduate, in good standing, of an HVAC Excellence accredited HVACR program offered by a community college, or trade school.
2. **Certification Examinations**
   The applicant must successfully pass the following four HVAC Excellence certification exams prior to application:
   1. Electrical
   2. Air Conditioning
   3. Electric Heat
   4. System Performance which covers Critical Charging, Airflow, Psychrometrics, and Combustion Analysis
3. **Academic Performance**
   The applicant must have graduated with a minimum cumulative grade average of "C" or higher.

4. **Advanced Placement and Credit**
   Applicants who meet the eligibility requirements for acceptance into a United Association Local Union HVACR apprenticeship program may be granted advanced placement as a second-year apprentice and may receive up to one (1) year of related training credit.

   The awarding of advanced placement and credit shall be consistent with the policies and procedures of the respective Local Union apprenticeship program.

5. **Additional Requirements**
   The Local Union Training Director retains the authority to require completion of additional program requirements, including but not limited to: Safety training (e.g., OSHA 10), United Association–specific coursework (e.g., UA Heritage), etc.

   These requirements shall be completed in accordance with the standards of the Local Union apprenticeship program.

Documentation

It is the responsibility of the applicant to provide all required documentation to verify eligibility for advanced placement under this agreement.

Review and Modification

This agreement shall be reviewed jointly by representatives of both parties at a minimum of every two (2) years, or more frequently as necessary to reflect changes in industry standards or training requirements. Any modifications to this agreement must be mutually agreed upon in writing by both parties.

Termination

This agreement shall remain in effect until terminated by either party through written notice.

Raymond Boyd **Training Director** **United Association**	**Howard Weiss** **President** **HVAC Excellence**	4-21-2026 **Date**

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ACCREDITATION

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escogroup.org/accreditation