

2017



[PROGRAMS AND SERVICES MANUAL]

Effective November 1, 2017

This manual is intended to serve as the master of all policies and procedures relative to **WI's PROGRAMS and SERVICES.**

All other collateral materials shall be produced in concert with this manual.

For other WI policies and procedures see the Institute's:

Volunteer Service Manual

Foreword

This publication describes current policies and procedures that govern the Institutes' Programs and Services. This document has been developed through the ongoing efforts of the WI Board of Directors. Revisions will be published periodically and provided to all current program participants on the Institute's website for general access.

Programs and Services Manual

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Acronym Directory:

AMC - WI Accredited Millwork Company
NAAWS - North American Architectural Woodwork Standards
CCP - WI Certified Compliance Program
CMP - WI Certified Millwork Professional
CSIP - WI Certified Seismic Installation Program
DAS - WI Director of Architectural Services
HPDL - High Pressure Decorative Laminate
IIS - WI Independent Inspection Program
MCP - WI Monitored Compliance Program
MIP - WI Millwork Industry Professional
OSHDP - Office of Statewide Health Planning and Development

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| 1 | CODE OF ETHICS | |
| 1 | IS A REQUIREMENT of WI Affiliation. | |
| 2 | Woodwork Institute Affiliates and their staff are expected to conduct themselves in an ethical and professional manner, and: | |
| 2 1 | The following Code is intended to serve as a basis for their ethical conduct, as such it will also serve as the basis for judging the merit of a formal complaint, and it is understood that: | |
| 2 1 1 | Some words and phrases are subject to varying interpretations, and that an ethical principle may conflict with another | |
| 2 1 2 | Questions related to ethical conflicts can best be answered by thoughtful consideration of the fundamental principles, rather than reliance on detailed or specific regulations. | |
| 2 2 | AS A WOODWORK INSTITUTE AFFILIATE, WE AND OUR STAFF WILL . . . | |
| 2 2 1 | Be fair and take care not to discriminate or cause harm to others while respecting the values of equality, tolerance, and justice | |
| 2 2 2 | Not do anything which compromises or which is likely to compromise the impartiality of those who work for, or on behalf of, the Institute | |
| 2 2 3 | Be honest and trustworthy, not make deliberate false or deceptive claims, be honest about my qualifications, and about circumstances that might lead to conflicts of interest | |
| 2 2 4 | Exercise care not to misrepresent the Institute, its positions and/or policies, nor conduct myself in a manner to bring my position as an affiliate into disrepute | |
| 2 2 5 | Know, respect and follow the policies and/or procedures of the Institute while acknowledging and supporting proper authorized use of the Institute's resources | |
| 2 2 6 | Not use my position improperly to confer on or secure for myself an advantage or a disadvantage on another | |
| 2 2 7 | Not disclose information given to me in confidence, or information acquired which is of a confidential nature, without proper consent, unless required to do so by law | |
| 2 2 8 | Honor contracts, agreements, and specifications, especially those requiring compliance to our published Standards and/or WI's Certified, Seismic or Monitored Compliance programs | |
| 2 2 9 | Strive to achieve the highest quality, effectiveness, dignity and professional competence while managing my personnel and resources to enhance the quality of our professionalism | |
| 2 2 10 | Uphold principles of this Code and promote the same of other Affiliates and their staff | |
| 2 2 11 | Treat violations of this code as inconsistent with proper WI Affiliate behavior and understand that by engaging in gross misconduct, my WI Affiliate status may be terminated. | |

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| 2 QUALITY CONTROL OPTIONS | |
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| 1 | AVAILABLE TO ALL regardless of affiliation with the Institute, however: |
| 1 1 | WI does not guarantee or assure the safety or performance of any manufactured products, components, or installation thereof, found to be in compliance with the NAAWS and/or the contract documents under its certification programs. Additionally, WI does not guarantee or assure the contract performance of any entity being inspected under their certification programs. |
| 1 2 | WI serves only as an independent inspection service and has no enforcement authority. |
| 1 3 | WI reserves the right to prelien and project pursuant to California Civil Code Sections 3110-112. |
| 2 | DOCUMENT RETENTION |
| 2 1 | Certification and/or Inspection reports and collateral records are retained as follows: |
| 2 1 1 | Paper records – 4 years after close of file |
| 2 1 2 | Digital records – Indefinitely |
| 2 1 3 | Adopted standards (Manual of Millwork and/or Architectural Woodwork Standards) - Indefinitely |
| 3 | CONSULTING REVIEWS are non-inspections and are unofficial in nature, conducted at the discretion and convenience of WI's Director's of Architectural Services (DAS), and: |
| 3 1 | Are not part of any WI certification and/or inspection service. |
| 3 2 | Verbal remarks made during such review are consultive only and not an official opinion of the Institute unless confirmed in writing. |
| 4 | INSPECTIONS are scheduled and processed as timely as possible; however, may take up to 14 days, and: |
| 4 1 | Require an executed "Request and Authorization to Inspect" form, full payment of the appropriate inspection fees, and: |
| 4 2 | Are based on compliance with the requirements of contract documents and our adopted standards unless specifically agreed otherwise in writing, and: |
| 4 2 1 | All inspected items and findings will be itemized |
| 4 3 | Are sent to the Administrative Office for processing within three (3) working days of their completion |
| 4 4 | Are published to applicable parties (architect/designer, contractor, fabricator/installer, requesting party, and IOR) within five (5) working days of their receipt by first class mail, and: |
| 4 4 1 | By fax or email if so requested |
| 4 5 | It is the responsibility of the requesting and/or contractual parties to: |
| 4 5 1 | Request inspection and/or re-inspection in writing on WI's "Request and Authorization to Inspect" form and submit such to an appropriate DAS and/or the Administrative office |
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| 2 QUALITY CONTROL OPTIONS | |
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| 4 | INSPECTIONS (continued) |
| 4 5 | It is the responsibility (continued) |
| 4 5 1 | Request inspection and/or re-inspection (continued) |
| 4 5 2 | Additional inspection charges shall be paid in full before release of a projects certified compliance certificate. |
| 4 5 3 | Address and/or enforce any non-compliant findings |
| 4 5 4 | Arrange for re-inspection, subject to: |
| 4 5 4 1 | Re-inspections being charged as a new inspection |
| 4 5 5 | Notify and give written evidence as to the specific approval by owner or owners representative (design professional) of any modifications to the project plans, specifications, shop drawings, and/or the NAAWS of the millwork product and/or installation before an inspection or re-inspection is performed; otherwise, they will be ignored, and: |
| 4 5 5 1 | Changes incorporated within reviewed shop drawings are not evidence of approval; changes must be specifically addressed and approved in separate written documentation |
| 4 5 5 2 | Approval of modifications after an inspection has been conducted will be ignored, and: |
| 4 5 5 2 1 | The project will not be eligible for Certification. |
| 4 6 | Shop Drawings are performed based on the architectural specifications and the NAAWS without benefit of reviewing the architectural plans, and: |
| 4 6 1 | Inspection fees are predicated on the inspection being conducted in the DAS's field office, and: |
| 4 6 1 1 | Inspections conducted elsewhere are subject to additional charges |
| 4 6 1 2 | Additional inspection time will be charged at the applicable rate as published on WI's website |
| 4 6 1 3 | It is the responsibility of the architectural millwork fabricator and/or installation firm submitting shop drawings to notify and give evidence as to the validity of any modifications the shop drawings may have to the specifications and/or the NAAWS , and: |
| 4 6 1 3 1 | Changes incorporated within reviewed shop drawings are not evidence of approval; changes must be specifically addressed and approved in separate written documentation |
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| 2 | | QUALITY CONTROL OPTIONS | |
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| 4 | INSPECTIONS (continued) | | |
| 4 | 6 | For Shop Drawings (continued) | |
| 4 | 6 | 2 | Require submittal of: |
| 4 | 6 | 2 | 1 Two (2) sets if printed |
| 4 | 6 | 2 | 2 One (1) set if digital |
| 4 | 6 | 2 | 3 Applicable project specifications including the General Conditions |
| 4 | 6 | 2 | 4 Any written modification approvals to the project plans and/or specifications |
| 4 | 6 | 3 | Drawings required to be certified for compliance within the scope of the NAAWS shall, at a minimum, meet the formatting requirements of the NAAWS |
| 4 | 6 | 4 | Drawings for projects that are phased or that are submitted in more than one installment, but are for one project and under one contract, will be charged one inspection fee, plus: |
| 4 | 6 | 4 | 1 All additional inspection time required to complete the inspection, subject to: |
| 4 | 6 | 4 | 1 1 One hour minimum charge per additional review |
| 4 | 6 | 5 | If passed, an individually serial numbered shop drawing label or digitally signed image will be applied to the first page of the certified submittal indicating those pages covered and bear the WI inspector's signature |
| 4 | 6 | 6 | If failed, the shop drawings shall be corrected and submitted for re- inspection and: |
| 4 | 6 | 6 | 1 Will be charged as a new inspection |
| 4 | 7 | Products, Finishing and/or Installation are judged within the combined scope of the project plans, shop drawings, specifications, the latest edition of the NAAWS, and any approved modifications in writing, and: | |
| 4 | 7 | 1 | Inspection fees are predicated on the inspection being conducted at the project site and/or the manufacturers shop, and: |
| 4 | 7 | 1 | 1 Requests for mock-up or partial product/installation inspections are subject to additional charges |
| 4 | 7 | 1 | 2 The applicable project specifications including General Conditions |
| 4 | 7 | 1 | 3 An additional trip fee will be charged when an inspection is scheduled but upon DAS arrival at the project site is determined that fabrication and/or installation is not ready for inspection |
| 4 | 7 | 2 | Service Outside our service area of Arizona, California, Hawaii Nevada, Oregon, and Utah requires: |
| 4 | 7 | 2 | 1 Payment of estimated cost in advance of service, payment of any additional per hour charges (as posted on WI's website) before release of report |
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| 2 QUALITY CONTROL OPTIONS | | | |
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| 4 | INSPECTIONS (continued) | | |
| 4 | 7 | For Products, Finishing and/or Installation (continued) | |
| 4 | 7 | 3 | Certification fees are based on one inspection per project per location, and: |
| 4 | 7 | 3 | 1 Inspections for projects that are phased or inspected in more than one visit, but whose scope is under one contract, will be charged one basic inspection fee, subject to: |
| 4 | 7 | 3 | 1 1 A two hour minimum charge per additional on-site inspection required |
| 4 | 7 | 3 | 2 Inspections for contracts that cover multiple sites will be charged one inspection fee for each site |
| 4 | 7 | 4 | Individually serial numbered labels will be applied as applicable during each inspection; however, issuance of a certificate will be deferred until the project inspection is complete |
| 4 | 7 | 5 | If failed, the findings shall be corrected and re-submitted for inspection and: |
| 4 | 7 | 5 | 2 Will be charged as a new inspection |
| 5 | NORTH AMERICAN ARCHITECTURAL WOODWORK STANDARDS (NAAWS): | | |
| 5 | 1 | Adopted and published jointly as our industry standard for architectural millwork in which the materials, fabrication, workmanship, installation, and aesthetics are established dependent on the Grade or Grades specified, use of which clearly and completely: | |
| 5 | 1 | 1 | Defines all materials and joinery |
| 5 | 1 | 2 | Fosters fair competition with all bidders using one standard of quality |
| 5 | 1 | 3 | Prohibits the substitution of unknown or inferior materials and/or joinery |
| 5 | 1 | 4 | Takes the guess work out of 'or equal' clauses; and is non-discriminatory |
| 5 | 1 | 4 | 1 A design professional may, but only by means of the drawings and/or specifications, modify any and all grades, and: |
| 5 | 1 | 4 | 1 1 Such modifications shall govern and take precedence over the grade rules, and any inspection and/or re-inspection shall be made based on these modifications |
| 5 | 2 | Is provided free of cost to Design Professionals and General Contractors in our service area, and | |
| 5 | 2 | 1 | Is sold to all others. |
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| 2 QUALITY CONTROL OPTIONS | |
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| 6 | CERTIFIED COMPLIANCE PROGRAM (CCP):  |
| 6 1 | Is an established discipline of quality control for shop drawings, millwork and/or installation, as specified by the design professional, for use in conjunction with the North American Architectural Woodwork Standards (NAAWS), which: |
| 6 1 1 | Provides a non-biased means of confirming conformance to a project's plans and specifications wherein: |
| 6 1 1 1 | For Shop Drawings, evidence of certification is provided by means of an individually serial numbered CCP shop drawing label or digitally signed image, attached to the first page of the original shop drawing set |
| 6 1 1 2 | For Millwork and Installation, evidence of certification is provided by issuance of a CCP certificate, listing the items certified, the applicable grade(s), and whether installation is included, and: |
| 6 1 1 2 1 | Each elevation of casework and/or countertops shall bear an individually serial numbered CCP label (if so specified). |
| 6 2 | Is a flat rate fee program, as published on WI's website, honored on any projects located within the Institute's service area of Arizona, California, Hawaii, Nevada, Oregon and Utah or throughout the continental United States on projects when such is specified by design professionals from our service area, and: |
| 6 2 1 | On all project specifications only requiring certification of shop drawings, without the requirement for certification of product, and/or installation – stand alone shop drawing certification is applicable |
| 6 2 2 | On project specifications only requiring certification of product and/or installation, without requirement for certification of shop drawings - full certification, including shop drawings is applicable and required |
| 6 2 3 | An additional fee is applicable on phased projects (including up to two hours of on-site inspection time) for each additional phase |
| 6 2 4 | Additional costs will be charged for certification on projects outside of the Institute's service area of California, Nevada, Oregon, Arizona, Utah and Hawaii, as published on WI's website |
| 6 2 5 | It is the responsibility of the millwork fabricator and/or installer to include within their bid all costs for certification |
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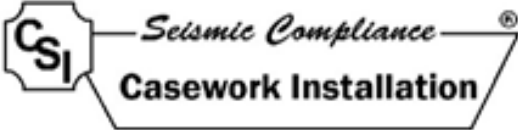
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| 6 | CERTIFIED COMPLIANCE PROGRAM (CCP) (continued) |
| 6 3 | When specified, the Institute will inspect shop drawings, fabricated product, factory finishing, and/or installation to assure that it complies with the NAAWS, plans, specifications, and other contract documents |
| 6 4 | If certification by an AMC is questioned and WI is asked to inspect any aspect of the project, it is considered a validated inspection, and: |
| 6 4 1 | The Institute, within a reasonable length of time of request, will send a qualified WI inspector to inspect work in question, who will: |
| 6 4 1 1 | Issue a written report: |
| 6 4 1 1 1 | Confirming that all materials, fabrication, and/or installation are as specified, or: |
| 6 4 1 1 1 1 | Detailing any non-compliant conditions found to exist |
| 6 5 | May be requested by completing the WI "Request and Authorization To Inspect" form, and submitting such to the appropriate WI Director of Architectural Services (DAS) along with access to or a copy of: |
| 6 5 1 | Project plans |
| 6 5 2 | Applicable project specifications (including General Conditions) |
| 6 5 3 | Any written modification approvals to the project plans and/or specifications |
| 6 5 4 | Any other necessary documentation |
| 6 6 | See Appendix for examples of: |
| 6 6 1 | Certified Compliance labels for Shop Drawing, Cabinet, HPDL Countertops – Flat, HPDL Countertops – Formed, Solid Surface Countertops, Laboratory Countertops, and Digital Shop Drawing |
| 6 6 2 | Certified Compliance Certificate (issued by WI Staff or WI AMC) |
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| 2 | | QUALITY CONTROL OPTIONS | |
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| MONITORED COMPLIANCE PROGRAM (MCP): | | | |
| 7 | |  | |
| 7 | 1 | Is an established discipline of quality control which provides ongoing review/inspections of the project from the beginning through certification at completion and: | |
| 7 | 1 | 1 | Self-certification is not allowed |
| 7 | 1 | 2 | All fabricators and/or installers are required to comply with the inspection requirements. |
| 7 | 2 | Is a percentage fee program, as published on WI's website, based on the millwork portion of the contract (minimum set fee for those projects less than \$100,000) encompassing review of shop drawing, fabrication and installation, honored on any project located within the Institute's service area of Arizona, California, and Nevada, and: | |
| 7 | 2 | 1 | Fees in excess of \$6,000, may be made in 3 payments subject to: |
| 7 | 2 | 1 | 1 The first payment shall be the base rate of \$3,000 and 1/3 of the certification fees, payable at the time the request to monitor is made |
| 7 | 2 | 1 | 2 The second payment shall be for ½ the remainder of unpaid certification fees, payable at the midpoint of inspections, as determined by the DAS |
| 7 | 2 | 1 | 3 The third and final payment shall be for the remainder of certification fees including any adjustments for modifications or change orders, payable prior to the final inspection |
| 7 | 2 | 2 | Additional costs will be charged for projects outside of the Institute's service area of California, Nevada and Arizona, as published on WI's website |
| 7 | 2 | 3 | It is the responsibility of the architectural millwork fabricator and/or installer to include within their bid any and all costs for certification |
| 7 | 3 | Verifies compliance to project plans, specifications, and the Architectural Woodwork Standards for the grade(s) specified for the following aspects: | |
| 7 | 3 | 1 | Shop drawings, materials, fabrication, finishing, workmanship, job-site conditions, installation, and attachment blocking, and: |
| 7 | 3 | 1 | 1 Shop drawing certification is required and shop drawings are compared to the full contract documents, including plans, to verify conformance with the design intent, contract documents, and the NAAWS for the grade(s) specified |
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| 2 QUALITY CONTROL OPTIONS | | | | | |
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| 7 | MONITORED COMPLIANCE PROGRAM (MCP) (continued) | | | | |
| 7 | 4 | Verifies compliance (continued) | | | |
| 7 | 4 | 1 | Shop drawings, materials (continued) | | |
| 7 | 4 | 1 | 1 | An individually serial numbered MCP shop drawing label or digitally signed image will be applied to the first page of the certified submittal indicating those pages covered and bear the WI inspector's signature | |
| 7 | 4 | 2 | Monitoring inspections are conducted during a project's duration with the number of required inspections determined by the Inspector based on the project's complexity, and: | | |
| 7 | 4 | 2 | 1 | Written reports are generated after each monitoring inspection, noting any non-compliant findings along with a general statement of the project's progress | |
| 7 | 4 | 2 | 2 | Reports are processed from the administrative office and forwarded to each contact of record for the architect/owner, millwork fabricator and/or installer, and general contractor, and: | |
| 7 | 4 | 2 | 2 | 1 Subsequent inspections will re-address and update the status of any previous non-compliant findings | |
| 7 | 4 | 2 | 2 | 2 Non-compliant job-site conditions and the potential adverse impact of such to the project's millwork products will be noted; however: | |
| 7 | 4 | 2 | 2 | 2 | 1 Subsequent final inspection and/or monitored certification will not be impacted by the compliance of such |
| 7 | 4 | 2 | 3 | Upon conducting a final compliant inspection, WI will: | |
| 7 | 4 | 2 | 3 | 1 | Attach a MCP label to each elevation of casework and countertop |
| 7 | 4 | 2 | 3 | 2 | Issue a MCP certificate certifying that the millwork products and their installation furnished for this project fully meet all the requirements of the contract documents and the NAAWS for the Grade(s) specified |
| 7 | 5 | May be requested by completing the WI "Request and Authorization To Monitor" form, and submitting such to the appropriate WI Director of Architectural Services (DAS) along with a copy of: | | | |
| 7 | 5 | 1 | Applicable millwork and/or installation contract, including schedule of values | | |
| 7 | 5 | 2 | Project plans and applicable specifications including General Conditions | | |
| 7 | 5 | 3 | Any written modification approvals to the project plans and/or specifications | | |
| 7 | 5 | 4 | Any other necessary documentation | | |
| 7 | 6 | See appendix for examples of: | | | |
| 7 | 6 | 1 | Monitored Compliance labels | | |
| 7 | 6 | 2 | Monitored Compliance Certificate issued by WI Office | | |
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| 8 | CERTIFIED SEISMIC INSTALLATION PROGRAM (CSIP):  |
| 8 1 | Is an established discipline of quality control for use with WI's engineered OSHPD seismic casework installation pre-approvals, which: |
| 8 1 1 | Can be used as an expansion of WI's CC and MC programs or as a stand-alone certification program |
| 8 1 2 | Provides a non-biased means of confirming conformance to a projects specific seismic casework installation in wall blocking, fastener size, frequency and location requirements |
| 8 1 3 | Provides review of shop drawings for blocking location requirements, and if: |
| 8 1 3 1 | In conjunction with either the CC or MC program's evidence of compliance is provided by means of an individually serial numbered CCP shop drawing label or digitally signed image applied to the first page of the certified submittal |
| 8 1 3 2 | Not in conjunction with either the CC or MC program's evidence of compliance is provided by means of the individually serial numbered CSIP certificate |
| 8 2 | Fees are as posted on the WI website and honored on any project located within the Institute's service area of Arizona, California, and Nevada, and: |
| 8 2 1 | Additional costs will be charged for CSIP on projects outside of the Institute's service area of California, Nevada and Arizona, as published on the WI website |
| 8 2 2 | The installer is required to comply with the requirements of CSIP when so specified, and: |
| 8 2 2 1 | It is the responsibility of the architectural millwork fabricator and/or installer to include within their bid any and all costs for CSIP |
| 8 3 | May be requested by completing the WI "Request and Authorization To Monitor" form, and submitting such to the appropriate WI Director of Architectural Services (DAS). |
| 8 4 | Inspections will be conducted during a project's installation, and: |
| 8 4 1 | The actual number of inspections required will be determined by the WI DAS |
| 8 4 2 | Written reports will be generated noting any non-compliant findings along with a general statement of the project's progress, and: |
| 8 4 2 1 | Forwarded to each contact of record for the architect/owner, millwork fabricator and/or installer, and general contractor. |
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| 2 QUALITY CONTROL OPTIONS | |
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| 8 | CERTIFIED SEISMIC INSTALLATION PROGRAM (CSIP) (continued) |
| 8 4 | Inspections will be conducted (continued) |
| 8 4 3 | Subsequent inspections will re-address and update the status of any previous non-compliant findings |
| 8 4 4 | Upon conducting a final compliant inspection, WI will: |
| 8 4 4 1 | Issue a Certified Seismic Installation Certificate certifying that the casework blocking and installation meet all the requirements of the contract documents, the NAAWS for the grade and/or grades specified, WI's engineered OSHPD seismic casework installation pre-approvals and WI's CSIP requirements |
| 8 5 | Certified Seismic Installation Compliance may be requested by completing the WI "Request and Authorization To Inspect" form and submitting such to the appropriate WI Director of Architectural Services (DAS) or WI's Administrative office, along with access to or a copy of: |
| 8 5 1 | Project plans |
| 8 5 2 | Applicable project specifications including General Conditions |
| 8 5 3 | Any written modification approvals to the project plans and/or specifications |
| 8 5 4 | Any other necessary documentation |
| 8 5 5 | See appendix for example of Certified Seismic Installation Certificate (issued by WI). |
| 9 | INDEPENDENT INSPECTION SERVICE (IIS): |
| 9 1 | When requested and on a fee basis, a WI Director of Architectural Services (DAS) will be made available for independent inspection service with respect to issues pertaining to the architectural millwork industry as defined or covered by NAAWS . |
| 9 2 | Fees are as posted on WI's website and are honored on any project located within the Institute's service area of Arizona, California, and Nevada, and: |
| 9 2 1 | Additional costs, as published on WI's website, will be charged for IIS on projects outside of the Institute's service area of California, Nevada and Arizona |
| 9 3 | May be requested by completing the WI "Request and Authorization To Monitor" form, and submitting such to the appropriate WI Director of Architectural Services (DAS). |
| 9 4 | Inspection(s) will be based on the NAAWS , Custom Grade unless the project specifications or specific written direction by the requesting party provides otherwise, and: |
| 9 4 1 | If inspection(s) is to be based on other standards, specification, or requirements, a full copy of such shall be provided to the Institute at the time of an Independent Inspection Service request |
| 9 5 | DAS assignment will be based on availability and efficiency of field office location for travel. |
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| 10 | EXPERT WITNESS/OPINION SERVICE (EWS): |
| 10 1 | When requested and on a fee basis, a WI Director of Architectural Services (DAS) will be made available for expert opinions and/or witness service with respect to issues pertaining to the architectural millwork industry as defined within or covered by the North American Architectural Woodwork Standards (NAAWS) |
| 10 2 | Is available within WI's service area of Arizona, California, and Nevada, and: |
| 10 2 1 | Fees are as posted on the WI website, honored on any project located within the Institute's service area of Arizona, California, and Nevada, and: |
| 10 2 2 | Additional costs, as published on WI's website, will be charged for EWS on projects outside of the Institute's service area of California, Nevada and Arizona |
| 10 3 | May be requested by completion of the WI 'Request for Expert Opinion / Witness Service' form by a contractual party (owner, design professional, contractor or supplier/fabricator) to our Administrative Office, and: |
| 10 3 1 | A paid physical inspection to review and formulate an opinion and written report on the issue(s) in question: |
| 10 3 2 | If additional deposition, testimony or court appearance time is required, it will be charged separately on a per hour basis, as posted on the WI website, subject to: |
| 10 3 2 1 | A minimum of one hour for each occurrence, with additional time beyond the first hour billed in quarter hour increments |
| 10 3 2 2 | A per hour charge as posted on the WI Website, (discounted as applicable) for all time spent away from the DAS's field office, not to exceed 8 hours per day (including all travel and/or standby time), and: |
| 10 3 2 2 1 | Billed in quarter hour increments |
| 10 4 | DAS assignment will be based on availability and the efficiency of field office location for travel. |
| Continued on next column ▼ | |

| 2 QUALITY CONTROL OPTIONS | |
|----------------------------------|---|
| Continued from previous column ▲ | |
| 11 | SITE CONDITION INSPECTION SERVICE (SCIS): |
| 11 1 | When requested and on a fee basis, a WI Director of Architectural Services (DAS) will be made available for site condition inspection service with respect to issues pertaining to the architectural millwork industry as defined within or covered by the North American Architectural Woodwork Standards (NAAWS) |
| 11 2 | Is available for the standard flat rate fee, as posted on the WI Website, on any projects located within the Institute's service area of Arizona, California, Nevada, and Oregon; however: |
| 11 2 1 | Additional on-site inspection time after the first hour shall be billed, as posted on WI's Website, per hour, in quarter hour increments |
| 11 3 | May be requested by completion of the WI 'Request and Authorization to Inspect' form by a contractual party (owner, design professional, contractor or supplier/fabricator) to our Administrative Office, with: |
| 11 3 1 | Payment of estimated cost in advance of service |
| 11 4 | Inspection(s) will be based on Section 2 of the NAAWS , unless the project specifications provide otherwise, and: |
| 11 4 1 | If inspection(s) is to be based on other standards or specification requirements, a full copy of such shall be provided to the Institute at the time of a Site Condition Inspection Service request |
| 11 5 | DAS assignment will be based on availability and efficiency of field office location for travel. |

Programs and Services Manual

3 PRODUCT ACKNOWLEDGEMENT

| | | | |
|---|---|--|---|
| 1 | THE INSTITUTE OFFERS ACKNOWLEDGMENT OF PRODUCTS conforming to the appropriate minimum requirements of our published Standards, including adhesives, finishes, hardware, laminates, solid surface, panel products. etc. | | |
| 1 | 1 | Products not requiring independent testing, require applicants to submit: | |
| 1 | 1 | 1 | A physical sample |
| 1 | 1 | 2 | Sales and technical literature |
| 1 | 1 | 3 | Letter attesting to minimum NAAWS compliance |
| 1 | 2 | Products requiring independent testing such as hinges, drawer slides, solid surface, laminates, and chemical resistance, require applicants to submit: | |
| 1 | 2 | 1 | A physical sample, and: |
| 1 | 2 | 1 | In the case of exposed knuckle hinges, if acknowledged, 10 additional hinges for samples for future appearance comparison |
| 1 | 2 | 2 | Sales and technical literature |
| 1 | 2 | 3 | Independent testing report acknowledging compliance to our Standards published minimum requirements. |
| 1 | 3 | <u>Firm's submitting products found to be compliant will:</u> | |
| 1 | 3 | 1 | Receive a letter of acknowledgement from WI, and |
| 1 | 3 | 2 | Product will be listed on WI's website |
| 1 | 3 | 3 | <u>MIP compliant products will in addition:</u> |
| 1 | 3 | 3 | 1 Have an enhanced listing on WI's website |
| 1 | 3 | 3 | 2 Be announced in WI's Details & Archetype publications |
| 1 | 3 | 3 | 3 Be permitted to use WI's Listed Product Logo on collateral material to further identify such |
| 1 | 4 | <u>Financial Procedures:</u> | |
| 1 | 4 | 1 | Basic review and acknowledgement fees are as posted on the WI website. |
| 1 | 4 | 2 | MIP's are permitted unlimited product acknowledgement requests at no cost. |

4 AWARD/RECOGNITION PROGRAMS

| | | | |
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| 1 | EXCEPTIONAL SERVICE, SUPPORT, EXPERTISE and ARTISTRY in architectural woodwork are recognized by the Institute in the following programs: | | |
| 1 | 1 | EXCEPTIONAL AFFILIATE LONGEVITY RECOGNITION | |
| 1 | 1 | 1 | Honors WI affiliates for their continuous partnership with the Institute, equal to or exceeding 25 years. |
| 1 | 1 | 1 | 1 Application is not required, tracking and administration is by WI staff. |
| 1 | 1 | 1 | 2 Recognition is continuous on WI's website and annually in its Archetype publication. |
| 1 | 2 | BERNARD B. BARBER JR. AWARD OF EXCELLENCE | |
| 1 | 2 | 1 | <u>Honors design professionals</u> for outstanding projects in which architectural woodwork is a predominant feature, and: |
| 1 | 2 | 1 | 1 Recipients are recognized: |
| 1 | 2 | 1 | 1 Annually in WI's Archetype publication and wall calendar, and: |
| 1 | 2 | 1 | 1 1st and 2nd place are selected for the cover of WI's Archetype Publication |
| 1 | 2 | 1 | 2 On WI's website |
| 1 | 2 | 1 | 2 All design professionals and WI affiliates are encouraged to apply |
| 1 | 2 | 1 | 3 All applications are first reviewed and approved by the Institute's Directors of Architectural Services (DAS) before they are considered, and: |
| 1 | 2 | 1 | 3 1 Decision of the Awards Committee is final |
| 1 | 2 | 2 | <u>Application</u> requires: |
| 1 | 2 | 2 | 1 Either Certified or Monitored compliance |
| 1 | 2 | 2 | 2 At least six (6) high-resolution (300 dpi or higher) digital photos sent on CD or flashdrive |
| 1 | 2 | 2 | 3 Design Professionals statement, see application for required inclusions |
| 1 | 2 | 2 | 4 Woodwork's statement, see application for required inclusions |
| 1 | 3 | WILBUR L. JOHNSTON AWARD OF EXCELLENCE | |
| 1 | 3 | 1 | Honors specification writers for their use of the NAAWS and one or more of WI's compliance programs within their specifications, and: |
| 1 | 3 | 1 | 1 Deadline is ongoing |
| 1 | 3 | 1 | 2 Recipients are recognized: |
| 1 | 3 | 1 | 2 1 Annually in WI's Archetype publication |
| 1 | 3 | 1 | 2 2 On WI's website |
| 1 | 3 | 1 | 3 Applicants are recommended by WI staff |
| Continued on next column ▼ | | | |


Programs and Services Manual

| 4 AWARD/RECOGNITION PROGRAMS | | | |
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| Continued from previous page ▲ | | | |
| 1 | EXCEPTIONAL SERVICE, SUPPORT, EXPERTISE and ARTISTRY (continued) | | |
| 1 | 4 | RALPH B. McCLURE CRAFTSMANSHIP AWARD | |
| 1 | 4 | 1 | Honors WI affiliates for their exceptional craftsmanship and/or installation of architectural millwork projects, and: |
| 1 | 4 | 1 | 1 Recipients are recognized: |
| 1 | 4 | 1 | 1 1 Annually in WI's Archetype Publication and wall calendar |
| 1 | 4 | 1 | 1 2 On WI's website |
| 1 | 4 | 1 | 2 All WI affiliates are encouraged to apply |
| 1 | 4 | 1 | 3 All applications are first reviewed and approved by the Institute's Directors of Architectural Services (DAS) before they are considered, and: |
| 1 | 4 | 1 | 3 1 Decision of the Awards Committee is final. |
| 1 | 4 | 2 | Application requires: |
| 1 | 4 | 2 | 1 Either Certified or Monitored compliance |
| 1 | 4 | 2 | 2 At least six (6) high-resolution (300 dpi or higher) digital photos sent on CD or flashdrive |
| 1 | 5 | FELLOWSHIP AWARD PROGRAM | |
| 1 | 5 | 1 | Honors individuals for their lifetime of significant achievements and service to the woodworking industry. |
| 1 | 5 | 2 | Nominee may be an Affiliate or Non-Affiliate of the Woodwork Institute with no less than 10 years in the industry, having made notable: |
| 1 | 5 | 2 | 1 Lifetime achievements, innovations, and/or contributions to the advancement of the woodworking industry |
| 1 | 5 | 2 | 2 Service contributions to the Woodwork Institute |
| 1 | 5 | 2 | 3 Educational activities and achievements, including organizational and instructional efforts and/or published work(s), that have had significant influence on the woodworking industry. |
| 1 | 5 | 3 | Application may be digital or hard copy, and: |
| 1 | 5 | 3 | 1 Completed applications will be sent to the Fellowship Selection Committee who will consist of two current Directors, two past Directors, and two Fellows, if available, serving two-year terms; if not available, the Board may appoint Fellows as necessary. The Committee will review the applications and make recommendations to the Board. Selection of a Fellow will be on an achievement or merit basis as determined by the application and moral and leadership qualities. |
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| 4 AWARD/RECOGNITION PROGRAMS | | | |
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| 1 | EXCEPTIONAL SERVICE, SUPPORT, EXPERTISE and ARTISTRY (continued) | | |
| 1 5 | FELLOWSHIP AWARD PROGRAM (continued) | | |
| 1 5 4 | Recognition may include: | | |
| 1 5 4 1 | Framed award certificate | | |
| 1 5 4 2 | Donation as may be approved by the Board to the Scholarship Fund by the Woodwork Institute in honor of the Fellow | | |
| 1 5 4 3 | Article highlighting the award winner in publicity materials, such as Details newsletter and Archetype magazine | | |
| 1 5 4 4 | WI web page highlighting the recipient of the Fellowship Award | | |
| 1 5 4 5 | Perpetual plaque with engraved nameplate (to remain in the Woodwork Institute office) | | |
| 1 6 | CE BERNHAUER JR. SCHOLARSHIP FOUNDATION | | |
| 1 6 1 | Offers scholarships to individuals interested in pursuing or furthering a career in the architectural millwork industry. | | |
| 1 6 2 | Application may be made by students entering or continuing enrollment in a university, state or private college, community college, or trade school, or from individuals already working in the industry and shall: | | |
| 1 6 2 1 | Include a written recommendation from a previous academic instructor or employer. | | |
| 1 6 2 2 | Be in their senior year of high school, or | | |
| 1 6 2 3 | Be employed and maintain employment during the educational period, or | | |
| 1 6 2 4 | Be currently enrolled in a state college/university, private or community college, or a trade school. | | |
| 1 6 3 | Recipients are selected on an achievement and/or merit basis as determined by transcripts and moral and leadership qualities, and: | | |
| 1 6 3 1 | Scholarship awards will be distributed directly to the school of the student's choice upon receiving proof of enrollment, and: | | |
| 1 6 3 1 1 | Must be distributed within two (2) years of award or they will be forfeited. | | |
| 1 7 | ALL APPLICATIONS POST-MARKED or RECEIVED on or before April 30 th will be considered for the current year, and: | | |
| 1 7 1 | Applications received on or after May 1 st will be considered for the upcoming year. | | |
| 1 8 | ALL RECOGNITIONS ARE ANNOUNCED in WI's Archetype publication | | |

Programs and Services Manual

| 5 AFFILIATION | |
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| 1 | IS A PRIVILEGE , granted to approved entities that meet specific minimum qualifications. |
| 1 1 | Longevity is recognized and honored. |
| 2 | APPLICATION REQUIRES: |
| 2 1 | Submittal of required documentation |
| 2 2 | Verification of qualifications |
| 2 3 | Agreeing to and signing the WI Code of Ethics. |
| 2 4 | Payment of: |
| 2 4 1 | Application fee as posted on the WI website |
| 2 4 2 | Annual fee as addressed below, subject to: |
| 2 4 2 1 | Proration on a quarterly basis at 25% for each quarter or portion thereof for the remaining year, with: |
| 2 4 2 1 1 | Remainder applied towards the next year's dues, credited at time of annual dues renewal. |
| 2 5 | Any further requirements as may be listed under specific affiliate classification. |
| 2 6 | If denied: |
| 2 6 1 | A denial letter will be sent to the applicant explaining: |
| 2 6 1 1 | Reason for denial |
| 2 6 1 2 | The appeal process (see Section 9). |
| 2 6 1 3 | Refund of annual fees only. |
| 3 | ANNUAL FEES ARE: |
| 3 1 | As posted on the WI website |
| 3 2 | Subject to change. |
| 3 3 | Invoiced annually in November and required to be paid by December 10 th for the following year: |
| 3 3 1 | With the option of a pre-authorized, automatic, monthly credit card payment plan for a 10% processing fee |
| 3 3 2 | Considered delinquent on January 1st through February 28/29th and subject to: |
| 3 3 2 1 | A fifteen percent (15%) late fee |
| 3 3 2 2 | Suspension of benefits or services |
| 3 3 2 3 | Exclusion of Affiliate listing on WI website |
| 3 3 2 4 | Termination on March 1 if payment is not received and: |
| 3 3 2 4 1 | If terminated, may be subject to reinstatement procedures. |
| 3 4 | Reinstatement for non-payment of fees is: |
| 3 4 1 | Permitted only during the year of termination for non-payment, and requires: |
| 3 4 1 1 | Submittal of a firm's credit score with a Low to Low-Medium Risk designation from a national credit reporting agency with good payment history, clear of liens |
| 3 4 1 2 | Payment of: |
| 3 4 1 2 1 | The full years fees, and |
| 3 4 1 2 2 | Payment of a thirty-five percent (35%) penalty. |
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| 5 AFFILIATION | |
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| 4 | DOCUMENT RETENTION POLICY |
| 4 1 | Application, reports, and records after close of file: |
| 4 1 1 | Paper – 4 years |
| 4 1 2 | Digital – indefinitely. |
| 5 | ACCREDITED MILLWORK COMPANY (AMC) affiliation is available to those entities engaged primarily in the fabrication, distribution, brokering, and/or installation of architectural millwork products per plans and specifications, and: <div>  </div> |
| 5 1 | When in good standing, is entitled to: |
| 5 1 1 | Have one management or CMP representative: |
| 5 1 1 1 | Hold office |
| 5 1 1 2 | Serve as director |
| 5 1 1 3 | Vote |
| 5 1 1 4 | Serve on AMC Advisory Committee |
| 5 1 2 | Display WI's AMC logo |
| 5 1 3 | One free paper and unlimited digital copies of each published edition of WI's adopted standards |
| 5 1 4 | Discounts, as published on WI website, on publications, educational programs, products and inspection/certification services |
| 5 1 5 | Participate in other benefits or programs as may be offered. |
| 5 1 6 | Listing on the WI website, including |
| 5 1 6 1 | WI License Types |
| 5 1 7 | CCP certification of projects not otherwise requiring such, for a nominal charge as posted on the WI website; subject to: |
| 5 1 7 1 | All requirements of CCP and an AMC's requirements under such. |
| 5 2 | Application requires: |
| 5 2 1 | Appropriate qualifications, including: |
| 5 2 1 1 | A minimum of six (6) letters of recommendation from a contractor, design professional and/or owner on company letterhead, for which applicant firm has manufactured or installed millwork products within the previous 24 months, with at least two (2) from: |
| 5 2 1 1 1 | Design professionals, and |
| 5 2 1 1 2 | Two (2) from general contractors/customers |
| 5 2 1 2 | No less than three (3) years direct full-time experience, or its equivalent, in commercial millwork manufacturing/installation within the previous five (5) years, subject to appeal with: |
| 5 2 1 2 1 | Adequate evidence of other appropriate experience |
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Programs and Services Manual

| 5 AFFILIATION | | | | |
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| Continued from previous page ▲ | | | | |
| 5 | ACCREDITED MILLWORK COMPANY (AMC) (continued) | | | |
| 5 | 2 | Application requires (continued) | | |
| 5 | 2 | 1 | Appropriate qualifications (continued) | |
| 5 | 2 | 1 | 3 | A Low to Low-Medium Risk designation from a national credit reporting agency with good payment history, clear of liens. |
| 5 | 2 | 1 | 4 | Copy of all State Contractor Licenses currently or previously held, including: |
| 5 | 2 | 1 | 4 | 1 Complete disclosure of any administrative or judicial actions taken concerning such licenses during the preceding 36 months. |
| 5 | 2 | 2 | Appointment of a primary contact who shall serve as the firms “Designated Representative” (not required to be a WI CMP) and: | |
| 5 | 2 | 2 | 1 | Take an open book examination (Accredited Millwork exam) on their knowledge of the industry, shop drawing development/submittal, and WI’s <i>Programs and Services Manual</i> , with a passing score of 85% or better. |
| 5 | 2 | 2 | 2 | Oversee application process, including: |
| 5 | 2 | 2 | 2 | 1 Execution of the “Woodwork Institute License Warrant” binding applicant to the terms and conditions of the “Woodwork Institute License Agreement for Certified Compliance Program” |
| 5 | 2 | 3 | WI License Status, including: | |
| 5 | 2 | 3 | 1 | One or more of WI’s License Types: |
| 5 | 2 | 3 | 1 | 1 Type A - For all millwork products, excluding casework and non-wood countertops |
| 5 | 2 | 3 | 1 | 2 Type A-E - For installation of all millwork products, excluding casework and non-wood countertops |
| 5 | 2 | 3 | 1 | 3 Type A-D - For wood doors only |
| 5 | 2 | 3 | 1 | 4 Type A-D-E - For installation of wood doors only |
| 5 | 2 | 3 | 1 | 5 Type B - For casework |
| 5 | 2 | 3 | 1 | 6 Type B-E - For installation of casework |
| 5 | 2 | 3 | 1 | 7 Type C - For flat and or formed plastic laminate counter tops |
| 5 | 2 | 3 | 1 | 8 Type C* - For flat (only) plastic laminate countertops |
| 5 | 2 | 3 | 1 | 9 Type C-E - For installation of laminated plastic countertops |
| 5 | 2 | 3 | 1 | 10 Type DS - For solid surface countertops |
| 5 | 2 | 3 | 1 | 11 Type DS-E - For installation of solid surface countertops |
| 5 | 2 | 3 | 1 | 12 Type DL - For laboratory countertops |
| 5 | 2 | 3 | 1 | 13 Type DL-E - For installation of laboratory countertops. |
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| 5 AFFILIATION | | | | |
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| 5 | ACCREDITED MILLWORK COMPANY (AMC) (continued) | | | |
| 5 | 2 | Application requires (continued) | | |
| 5 | 2 | 3 | WI License Status, including (continued) | |
| 5 | 2 | 3 | 2 | Completion of all requirements within a 12 month period, subject to: |
| 5 | 2 | 3 | 2 | 1 A maximum of three, three month paid extensions are permitted, cost as posted on WI website |
| 5 | 2 | 3 | 3 | At least one employee who is a WI Certified Millwork Professional (CMP) designated as: |
| 5 | 2 | 3 | 3 | 1 Signator for all Requests for Certificates and Labels |
| 5 | 2 | 3 | 3 | 2 Inspector of Record for those projects for which s/he has requested Certificates and Labels. |
| 5 | 2 | 3 | 3 | 3 It is recommended that the chief estimator, chief draftsman, production manager, shop foreman, finishing foreman, and outside superintendent also consider becoming a CMP. |
| 5 | 2 | 3 | 4 | When applying for an installation license type, a valid certificate of Workers Compensation Insurance coverage naming Woodwork Institute as “certificate holder” |
| 5 | 2 | 3 | 5 | A WI Director of Architectural Services (DAS) conducting a physical verification that applicant has the adequate equipment and facilities to fabricate the product(s) for which they are requesting license status, and: |
| 5 | 2 | 3 | 5 | 1 Within Arizona, California, and Nevada, the cost of such is included in the initial application fee |
| 5 | 2 | 3 | 5 | 2 Outside of Arizona, California, and Nevada, the applicant shall pay: |
| 5 | 2 | 3 | 5 | 2 1 An initial deposit |
| 5 | 2 | 3 | 5 | 2 2 An hourly fee for all staff time spent away from the field office, up to 8 hours per day; including travel, standby, and observance time |
| 5 | 2 | 3 | 5 | 2 3 Reimbursement for all expenses, including as applicable, mileage at the federal approved mileage allowance for personal car use, coach class airfare, auto rental, reasonable lodging, meals, and other miscellaneous travel expenses |
| 5 | 2 | 3 | 6 | Submittal of all required information for each license type applied for, subject to: |
| 5 | 2 | 3 | 6 | 1 Type B, C, & D License requirement of a permanent business location with adequate machinery to engage in manufacturing/fabrication of product |
| 5 | 2 | 3 | 7 | Submission of at least three projects for inspection for each license type, which when inspected, meets or exceeds North American Architectural Woodwork Standards (NAAWS) Custom Grade requirements, and: |
| 5 | 2 | 3 | 7 | 1 As applicable, may be used for multiple License types |
| 5 | 2 | 3 | 7 | 2 Projects do not have to be “WI Certified” |
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Programs and Services Manual

| 5 AFFILIATION | | | | |
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| Continued from previous page ▲ | | | | |
| 5 | ACCREDITED MILLWORK COMPANY (AMC) (continued) | | | |
| 5 | 2 | Application requires (continued) | | |
| 5 | 2 | 3 | WI License Status, including (continued) | |
| 5 | 2 | 3 | 7 | Submission of at least three projects (continued) |
| 5 | 2 | 3 | 7 | 3 One (1) project, completed within the last twelve months for which access may be granted, may be submitted in lieu of a current project |
| 5 | 2 | 3 | 7 | 4 For projects submitted outside of Arizona, California and Nevada, the applicant: |
| 5 | 2 | 3 | 7 | 4 1 Shall pay all of WI's additional costs for inspection, including travel, lodging, meal expenses and additional hourly charges |
| 5 | 2 | 3 | 7 | 5 If a project meeting all the above requirements is NOT available, specimens may be furnished for inspection, and: |
| 5 | 2 | 3 | 7 | 5 1 Do not have to be constructed solely for inspection, they may be items manufactured for any project |
| 5 | 2 | 3 | 7 | 6 One (1) project may be WI Certified as part of the application process, any additional projects needing WI Certification prior to completion of an applicant's licensing process will be charged at the current AMC non-License inspection rate. |
| 5 | 2 | 3 | 7 | 7 Applicant having a maximum of five (5) attempts to provide three (3) consecutively passed inspections, and: |
| 5 | 2 | 3 | 7 | 7 1 Any project failing an inspection can no longer be used as a qualifying inspection, and: |
| 5 | 2 | 3 | 7 | 7 1 1 An additional project shall be submitted |
| 5 | 2 | 3 | 8 | License will be denied if applicant fails to pass the prescribed project inspection requirements for any license type |
| 5 | 2 | 4 | Agreeing to: | |
| 5 | 2 | 4 | 1 | One year probationary period, during which: |
| 5 | 2 | 4 | 1 | 1 Work in progress, including actual physical work and/or shop drawings, is subject to review by WI staff to ensure it is compliant to contract requirements. |
| 5 | 2 | 4 | 2 | WI's right to monitor the activity of new AMCs over the first year by reviewing the work being certified before requested certificates are released, thereafter: |
| 5 | 2 | 4 | 2 | 1 Certification activities will be monitored as needed and/or spelled out herein. |
| 5 | 2 | 4 | 3 | Products shipped to the first two projects for which certification is requested shall be inspected by a WI DAS in accordance with the following conditions before the certificates and/or labels are released, and: |
| 5 | 2 | 4 | 3 | 1 These projects shall be different than the ones submitted for each License type applied for |
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| 5 AFFILIATION | | | | |
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| Continued from previous column ▲ | | | | |
| 5 | ACCREDITED MILLWORK COMPANY (AMC) (continued) | | | |
| 5 2 | <u>Application requires</u> (continued) | | | |
| 5 2 4 | Agreeing to (continued) | | | |
| 5 2 4 3 | Products shipped to (continued) | | | |
| 5 2 4 3 2 | Shop drawings shall be submitted to WI for inspection | | | |
| 5 2 4 3 3 | A representative sampling of all product types to be certified shall be inspected by a WI DAS before job-site delivery, preferably in one inspection, and: | | | |
| 5 2 4 3 3 1 | Any product type unable to be inspected during the initial inspection is still required, if possible, to be inspected prior to delivery | | | |
| 5 2 4 3 3 2 | Any representative product samplings unable to be inspected prior to job-site delivery are still required to be inspected by a WI representative prior to release of certificates and/or labels; the inspection; however, will be conducted at the job-site. | | | |
| 5 3 | <u>If application is denied:</u> | | | |
| 5 3 1 | Applicant is prohibited from reapplying for 12 months. | | | |
| 5 4 | <u>For Certified Compliance Program (CCP):</u> | | | |
| 5 4 1 | <u>AMC's</u> are required to request all certification services specified in the contract documents before any service is rendered, and: | | | |
| 5 4 1 1 | When acting as a sub-sub must request certificates and labels at the time they are awarded the sub-sub contract | | | |
| 5 4 1 2 | On all project specifications only requiring Certified Compliance Labeling of shop drawings, without a requirement for certification of product, and/or installation – stand alone CCP shop drawing certification will be honored | | | |
| 5 4 1 3 | On projects requiring only Certified Compliance of product and/or installation, without the specific requirement for certification of shop drawings - regular CCP fees will apply, including shop drawing certification | | | |
| 5 4 1 4 | Work performed based on a contract and/or purchase order without having reviewed the original specifications to verify any certification requirements does not relieve the above responsibility. | | | |
| 5 4 2 | By requesting a shop drawing CCP label and applying it to drawings or product CCP labels and applying such to product, an AMC is conducting the initial (first) inspection, and: | | | |
| 5 4 2 1 | If WI is asked to inspect such shop drawings and/or product, it is considered a validation inspection, and: | | | |
| 5 4 2 1 1 | Validation inspections found to be in compliance will be at no cost | | | |
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Programs and Services Manual

| 5 AFFILIATION | | | | | | |
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| 5 | ACCREDITED MILLWORK COMPANY (AMC) (continued) | | | | | |
| 5 | 4 | For Certified Compliance Program (CCP) (continued) | | | | |
| 5 | 4 | 2 | By requesting (continued) | | | |
| 5 | 4 | 2 | 1 | If WI is asked to inspect (continued) | | |
| 5 | 4 | 2 | 1 | 3 | Validation inspections found to be non-compliant will be charged based on the actual inspection time in quarter hour increments, subject to: | |
| 5 | 4 | 2 | 1 | 3 | 1 | A one hour minimum charge for Shop Drawings |
| 5 | 4 | 2 | 1 | 3 | 2 | A two hour minimum charge for product and/or installation |
| 5 | 4 | 2 | 1 | 3 | 3 | Discounted pricing as published on WI's website |
| 5 | 4 | 3 | Requests for Certificates and Labels may take 5 to 7 days to process | | | |
| 5 | 4 | 4 | A \$75.00 processing fee will be charged for all corrections required on certificates because of improper or incomplete request submissions | | | |
| 5 | 4 | 5 | WI Shop Drawing Labels can only be applied to shop drawings for which the AMC is the direct contractor, subcontractor or sub-subcontractor. If the firm is a sub-subcontractor, the SD label must be contained within a box that clearly states in minimum 14 point font: These shop drawings were drawn and certified WI compliant by (insert name of AMC) | | | |
| 5 | 4 | 6 | AMC non-License rates will apply when specifications include language that states that self certification will not be allowed or that a DAS needs to perform the inspection | | | |
| 5 | 4 | 7 | It is the responsibility of the: | | | |
| 5 | 4 | 7 | 1 | AMC to ensure that all certification requirements for their scope of work is certified, even when they are subcontracting a portion of such scope of work to another firm, and: | | |
| 5 | 4 | 7 | 1 | 1 | Are subject to the same failure to certify and/or failed inspection consequences as if the work was performed by them. | |
| 5 | 4 | 8 | AMC's are subject to: | | | |
| 5 | 4 | 8 | 1 | Random monitoring to verify ongoing compliance with the licensee program requirements. Monitoring may entail observance of work during an unscheduled visit to their shop or project job-site, or an extensive Certified Compliance Inspection and: | | |
| 5 | 4 | 8 | 1 | 1 | Occasionally a request for a Certified Compliance Certificate and/or Labels may be issued through a DAS for verification of program conformance | |
| 5 | 4 | 8 | 1 | 2 | Failure to correct any non-compliant findings, may result in subsequent requests for CCP Certificate and/or Labels being subject to monitoring. | |
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| 5 AFFILIATION | | | | |
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| 5 | ACCREDITED MILLWORK COMPANY (AMC) (continued) | | | |
| 5 | 4 | For Certified Compliance Program (CCP) (continued) | | |
| 5 | 4 | 8 | AMC's are subject to (continued) | |
| 5 | 4 | 8 | 2 | If not licensed for all aspects of the project, an inspection by a DAS will be required |
| 5 | 4 | 8 | 2 | 1 Payment of such will be at the AMC non-License rate as posted on the WI website |
| 5 | 4 | 8 | 2 | 2 Failure to request an inspection will be considered certification avoidance subject to non-certification policies (see Section 8) |
| 5 | 4 | 8 | 3 | The right to subcontract out their installation and self-certify such provided it is done under their direct control/guidance; however: |
| 5 | 4 | 8 | 3 | 1 WI must be advised of such at the time of the original certification request |
| 5 | 4 | 8 | 3 | 2 The subcontracting AMC is subject to the same failed inspection consequences as if the work was performed by its own staff |
| 5 | 4 | 9 | Validation Inspections (inspections conducted by WI Staff, after AMCs initial inspection, either because of WI Monitoring of an AMC or a request by a contractual party such as the General Contractor, Design Professional or Owner). | |
| 5 | 4 | 9 | 1 | Require inspection of entire scope of work covered by the AMCs certification. |
| 5 | 4 | 9 | 2 | Are categorized as: |
| 5 | 4 | 9 | 2 | 1 PASSED – an inspection found compliant, with no additional follow-up required, and: |
| 5 | 4 | 9 | 2 | 1 1 Report will be published to all parties. |
| 5 | 4 | 9 | 2 | 2 PASSED CONDITIONAL – an inspection with minor non-compliant issue(s) requiring correction; however, not requiring any further re-inspection, and: |
| 5 | 4 | 9 | 2 | 2 1 The report and required action will be published to all parties, and: |
| 5 | 4 | 9 | 2 | 2 1 1 CMP will be copied |
| 5 | 4 | 9 | 2 | 2 2 AMC is responsible for providing proof of satisfactory corrections via a letter or email from the IOR, General Contractor or Design Professional, and: |
| 5 | 4 | 9 | 2 | 2 2 1 If AMC is not able to get proof of satisfactory corrections in accordance with above, CMP may request a DAS to verify compliance for a minimum 2 hour charge at the AMCs discounted hourly rate |
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Programs and Services Manual

| 5 AFFILIATION | | | | | | | | | | |
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| 5 | ACCREDITED MILLWORK COMPANY (AMC) | | | | | | | | (continued) | |
| 5 | 4 | For Certified Compliance Program (CCP) | | | | | | | (continued) | |
| 5 | 4 | 9 | VALIDATED INSPECTIONS | | | | | | | (continued) |
| 5 | 4 | 9 | 2 | Categorized as | | | | | | (continued) |
| 5 | 4 | 9 | 2 | 2 | PASSED CONDITIONAL | | | | | (continued) |
| 5 | 4 | 9 | 2 | 2 | 3 | If evidence of correction has not been provided or arrangement for verification by WI made within 30 days of the date the inspection report was published, the inspection will be converted to a Failed Inspection (subject to Failed procedures, found later in this Heading), and: | | | | |
| 5 | 4 | 9 | 2 | 2 | 3 | 1 | A letter will be sent by certified mail to the architect, and copied to all concerned parties, including the CMP, advising that labels and certificates are void for the particular project | | | |
| 5 | 4 | 9 | 2 | 2 | 3 | 2 | AMC will be charged an additional \$200.00 for administrative fees. | | | |
| 5 | 4 | 9 | 2 | 3 | FAILED – an inspection with major non-compliant issue(s) requiring a follow up re-inspection, and: | | | | | |
| 5 | 4 | 9 | 2 | 3 | 1 | The report will be published to all parties, including the CMP | | | | |
| 5 | 4 | 9 | 2 | 3 | 2 | AMC is required to make all corrections and notify the WI DAS for the project that it is ready for re-inspection within 30 days, and: | | | | |
| 5 | 4 | 9 | 2 | 3 | 2 | 1 | If additional time is required the AMC must submit a letter to WI indicating the reason and evidence of architects or GC’s approval of the additional time | | | |
| 5 | 4 | 9 | 2 | 3 | 3 | Regardless of corrections made the inspection will be considered failed for suspension/termination procedure purposes | | | | |
| 5 | 4 | 9 | 2 | 3 | 4 | If non-compliant findings are not fixed within 30 days: | | | | |
| 5 | 4 | 9 | 2 | 3 | 4 | 1 | First violation will result in SUSPENSION | | | |
| 5 | 4 | 9 | 2 | 3 | 4 | 2 | Second violation will result in TERMINATION | | | |
| 5 | 5 | Subject to suspension for: | | | | | | | | |
| 5 | 5 | 1 | Violation of the WI “Code of Ethics” | | | | | | | |
| 5 | 5 | 2 | Serious non-complaint findings, such as but not necessarily limited to: | | | | | | | |
| 5 | 5 | 2 | 1 | Un-notched cabinet door hinge provision | | | | | | |
| 5 | 5 | 2 | 2 | Insufficient hardware attachment | | | | | | |
| 5 | 5 | 2 | 3 | Installation not being plumb or level | | | | | | |
| 5 | 5 | 2 | 4 | Improper shelf and/or bottom material and/or thickness for span | | | | | | |
| 5 | 5 | 2 | 5 | Improper drawer box size, construction and/or material | | | | | | |
| 5 | 5 | 2 | 6 | Countertop construction and/or joints, match of color and/or grain | | | | | | |
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| 5 AFFILIATION | | | | | | | | | |
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| 5 | ACCREDITED MILLWORK COMPANY (AMC) (continued) | | | | | | | | |
| 5 | 5 | Subject to suspension for (continued) | | | | | | | |
| 5 | 5 | 2 | Serious non-complaint findings (continued) | | | | | | |
| 5 | 5 | 2 | 7 | Improper panel balance | | | | | |
| 5 | 5 | 2 | 8 | Improper millwork joinery | | | | | |
| 5 | 5 | 3 | Disciplinary Actions (see Section 8), including: | | | | | | |
| 5 | 5 | 3 | 1 | Non-certification | | | | | |
| 5 | 5 | 3 | 2 | Multiple Failed Inspections | | | | | |
| 5 | 5 | 4 | Filing for bankruptcy and/or going into receivership: | | | | | | |
| 5 | 5 | 4 | 1 | During which time all requests for a CCP Certificate and/or Labels will be subject to mandatory monitoring on a one hour minimum fee basis | | | | | |
| 5 | 5 | 4 | 2 | Once a firm clears the bankruptcy and/or receivership under the same ownership, their suspension will be removed; however: | | | | | |
| 5 | 5 | 4 | 2 | 1 | If ownership changes, AMC status will be terminated | | | | |
| 5 | 5 | 5 | Suspension may be reinstated by passing three consecutive, paid inspections on projects equal to or exceeding Custom Grade, and: | | | | | | |
| 5 | 5 | 5 | 1 | While on suspension, pay the AMC non-License rate as posted on the WI website, and | | | | | |
| 5 | 5 | 5 | 1 | 1 | License type information will be removed from WI Affiliate listing on the website: | | | | |
| 5 | 5 | 5 | 1 | 2 | Any verbal inquiry as to the AMCs status with the Institute or to a staff person is to be responded to with the statement that: | | | | |
| 5 | 5 | 5 | 1 | 2 | 1 | “(Firm’s name) is currently on suspension for infractions of its License Agreement for CCP; however, is still able to request certification from the Institute, subject to the project being inspected and approved by our DAS. This suspension shall continue until (firm name) has met the Institute’s requirements for removal of such.” | | | |
| 5 | 6 | Subject to termination for: | | | | | | | |
| 5 | 6 | 1 | Failure to adhere to the WI Code of Ethics, including engagement in conduct which is deemed contrary or prejudicial to the interests and/or purposes of the Institute, including: | | | | | | |
| 5 | 6 | 1 | 1 | Failing to certify work that is contractually required by the contract documents, and: | | | | | |
| 5 | 6 | 1 | 1 | 1 | Be barred from reapplying for a period of 12 months | | | | |
| 5 | 6 | 1 | 2 | Change of ownership exceeding fifty percent (50%) | | | | | |
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Programs and Services Manual

| 5 AFFILIATION | |
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| 5 | ACCREDITED MILLWORK COMPANY (AMC) (continued) |
| 5 6 | Subject to termination for (continued) |
| 5 6 2 | Certification or inspection failure of any 4 projects in a 24 month period |
| 5 6 3 | Misuse of Certified Compliance Labels |
| 5 6 4 | Fraudulent fabrication and use of unofficial certificates or labels. |
| 5 6 5 | Failure to have a CMP on staff |
| 5 6 5 1 | If a firm loses its only CMP, it will be given a 90-day grace period to allow time to replace the CMP |
| 6 | CERTIFIED MILLWORK PROFESSIONAL (CMP) affiliation is available to those individuals that meet the minimum qualifications and accept the responsibility of serving as a WI license signatory.  |
| 6 1 | When in good standing, is entitled to: |
| 6 1 1 | Be a CMP representative: |
| 6 1 1 1 | Hold office |
| 6 1 1 2 | Serve as director |
| 6 1 1 3 | Vote |
| 6 1 1 4 | Serve on CMP Advisory Committee |
| 6 1 2 | Display WI's CMP logo |
| 6 1 3 | Annual certificate of CMP status |
| 6 1 4 | Serve as Inspector of Record on behalf of employers AMC CCP License |
| 6 1 5 | One free paper and unlimited digital copies of each published edition of our standards |
| 6 1 6 | Discounts, as published on WI's website, on publications, educational programs, and/or future products |
| 6 1 7 | Participate in other benefits or programs as may be offered |
| 6 1 8 | Website, Roster and Archetype listing of CMP Status |
| 6 2 | Application requires: |
| 6 2 1 | Appropriate qualifications, including: |
| 6 2 2 | Taking an open book examination on their knowledge of the NAAWS and WI Program and Services Manual, with a passing score of 85% or better, and: |
| 6 2 2 1 | Examination may be retaken until passed |
| 6 2 3 | Agreeing to Disciplinary Actions (see Section 8) for: |
| 6 2 3 1 | Non-certification |
| 6 2 3 2 | Multiple Failed Inspections |
| 6 2 4 | CMP Affiliation may be |
| 6 2 4 1 | Transfer between AMC's for a one time fee of \$150. |
| 6 2 4 2 | Maintained when not employed by an AMC for a yearly fee of \$150 |
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| 5 AFFILIATION | |
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| 5 | CERTIFIED MILLWORK PROFESSIONAL (CMP) (continued) |
| 6 3 | Subject to termination for failure to adhere to the WI Code of Ethics, including engagement in conduct which is deemed contrary or prejudicial to the interests and/or purposes of the Institute and/or failure to adhere to the AMC's requirements when serving as inspector of record for AMC's CCP License. |
| 7 | MILLWORK INDUSTRY PARTNER (MIP) affiliation is available to those entities engaged primarily in the supplying of goods and services to AMC affiliates, which are not manufacturers or installers of fabricated architectural millwork products such as casework, countertops and passage doors. They shall not be direct suppliers of goods or services directly to an end user or the end user's contractor, nor hold a general contractors license, and:  |
| 7 1 | When in good standing, is entitled to: |
| 7 1 1 | Have one management representative: |
| 7 1 1 1 | Hold office |
| 7 1 1 2 | Serve as director |
| 7 1 1 3 | Vote |
| 7 1 1 4 | Serve on MIP Advisory Committee |
| 7 1 2 | Display WI's MIP logo |
| 7 1 3 | Annual certificate of MIP status for primary and branch locations |
| 7 1 4 | Access to WI's AMC and/or CMP mailing lists in Excel spreadsheet format |
| 7 1 5 | One free paper and unlimited digital copies of each published edition of our standards |
| 7 1 6 | Discounts, as published on WI's website, on publications, educational programs, and/or future products. |
| 7 1 7 | Participate in other benefits or programs as may be offered. |
| 7 1 8 | Website, Roster, Details and Archetype listing as MIP, including primary and branch locations |
| 7 1 9 | Unlimited MIP Acknowledged Product listings and promotion and use of WI's Acknowledged Product logo |
| 7 1 10 | Annual 1/8 page space for full color add in Archetype |
| 7 1 11 | Biannual 1/8 page space for full color add in Details |
| 7 2 | Subject to termination for failure, in serious degree, to adhere to the WI Code of Ethics, including engagement in conduct which is deemed contrary or prejudicial to the interests and/or purposes of the Institute. |

Programs and Services Manual

| 6 LOGOS and USAGE | |
|----------------------------|--|
| 1 | ARE TRADEMARKED and owned by Woodwork Institute, and: |
| 1 1 | By using the Institute's logo in printed or electronic format, affiliates are agreeing to accept the following terms and conditions |
| 1 2 | The Woodwork Institute logo is a tilted square with a knockout "W" in the center and shall be referred to in this document as "the big W", and: |
| 1 3 | The name "Woodwork Institute" shall appear with each Affiliate logo variation (see below) |
| 1 4 | Current logo shall replace all instances of any old logo on websites, stationery, forms, memos, fax sheets, mailings, etc.; however: |
| 1 4 1 | Items bearing the old logo, such as pins, belt buckles, and rings, are considered historical items and may be worn or used indefinitely |
| 1 5 | Electronic, affiliate specific logo downloads are available in the Affiliates Only portion of WI's website at www.woodworkinstitute.com/about/logos.asp , and in: |
| 1 5 1 | Multiple color options of Black, Green, Gradient Green and White, subject to: |
| 1 5 1 1 | White logos may be used only if on a dark background, with the tilted square, "Woodwork Institute", and Affiliate type all in white |
| 1 5 2 | Affiliates are granted permission to use the WI Affiliate logo; however: |
| 1 5 2 1 | Only that logo representing its Affiliate type, including: |
| 1 5 2 1 1 | The words "Woodwork Institute" with a line separating the Affiliate type of either "Accredited Millwork Company (AMC)", "Certified Millwork Professional (CMP)", or "Millwork Industry Partner (MIP)" as shown in Appendix |
| 1 5 2 2 | Affiliates are not permitted to use any other variation of the logos, and: |
| 1 5 2 2 1 | The logo may not be placed on shop drawings or fabricated products in such a manner as to make it appear that shop drawings or fabricated products have been certified. |
| 1 5 2 2 2 | Shall not alter their appearance, such as: |
| 1 5 2 2 2 1 | To color, shape, orientation, font, etc. |
| 1 5 2 2 3 | They may be re-sized; however: |
| 1 5 2 2 3 1 | The image must remain sharp and clear (not fuzzy) |
| 1 5 2 2 4 | Shall obtain original logo files from WI, and: |
| 1 5 2 2 4 1 | Not recreate the logo |
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| 6 LOGOS and USAGE | |
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| 1 | ARE TRADEMARKED (continued) |
| 1 5 | Electronic, affiliate specific logo (continued) |
| 1 5 2 | Affiliates are granted permission (continued) |
| 1 5 2 3 | Use of the knockout "W" or tilted square logo by itself, with or without the words "Woodwork Institute", or "Assurance" next to it shall only be used by the Woodwork Institute, and: |
| 1 5 2 3 1 | Altering or misusing the logo in any way may result in legal action |
| 1 5 2 3 2 | No materials, printed or published on the web, by any party other than the Woodwork Institute, shall feature a logo without "Woodwork Institute" and its affiliate type |
| 1 6 | Millwork Industry Partners (MIP) are granted permission to use the WI Listed Product logo in collateral materials to identify (an) acknowledged product(s), however: |
| 1 6 1 | The logo may not be placed in such a manner as to make it appear that non-acknowledged products have been approved |
| 1 6 2 | If affiliation is discontinued, use of the logo is not permitted in subsequent reprinted or newly created collateral materials |
| 1 7 | <u>Logo Colors:</u> |
| 1 7 1 | If a color version of the logo is used in print, only two solid colors shall be used: |
| 1 7 1 1 | Black and Green (PMS 355). |
| 1 7 2 | The words "Woodwork Institute" and the Affiliate type shall be black, and: |
| 1 7 2 1 | The tilted square may be black or green (PMS 355). |
| 1 7 3 | White logos may be used only if on a dark background, with: |
| 1 7 3 1 | The tilted square, "Woodwork Institute", and affiliate type all in white. |
| 1 7 4 | If used on the web, only three solid colors shall be used: |
| 1 7 4 1 | Black, hexadecimal color #008030, and white. |
| 1 8 | <u>The font</u> used in the logo is Book Antiqua; however, the following similar fonts may be used to match the logo font: |
| 1 8 1 | Bodoni, Bookman, Calisto, Caslon, (New) Century Schoolbook, Garamond, Minion Pro, Palatino |
| 1 9 | <u>Gradient Logos:</u> |
| 1 9 1 | May be used in print or on the web; however: |
| 1 9 1 1 | Not on embroidered items (such as clothing) |
| 1 9 2 | Only the green tilted square shall feature the gradient |
| 1 9 3 | If used for professional print jobs, process color printing may be necessary to retain the quality of the gradient. |
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Programs and Services Manual

| 6 LOGOS and USAGE | |
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| 1 10 | Quality shall be the first consideration when reproducing the logo. A fuzzy, pixilated, or otherwise poor quality logo is unacceptable |
| 1 11 | Minimum reproduction size shall not be less than 3/8 inch tall |
| 1 12 | Placement: |
| 1 12 1 | Shall never be on a textured or “busy” background |
| 1 12 2 | Shall always have ample white space surrounding it, and: |
| 1 12 2 1 | Shall not be crowded with other logos or artwork. |
| 1 12 3 | Shall be solid white, if on a dark background. |

| 7 FINANCIAL CONSIDERATIONS | |
|----------------------------|--|
| 1 | ANNUAL AFFILIATE FEES are: |
| 1 1 | Invoiced annually, approximately November 15th and payable by December 10 th for the year following, with the option of: |
| 1 1 1 | Pre-authorized, automatic, monthly credit card payment plan, subject to a 10% processing fee. |
| 1 2 | Considered delinquent on January 1st through February 28th/29th, subject to: |
| 1 2 1 | A fifteen percent (15%) late fee |
| 1 2 2 | Termination on March 1st if payment not received, and |
| 1 2 3 | Suspension of any benefits, and: |
| 1 2 3 1 | Subject to any further requirements listed under the specific affiliate classifications |
| 2 | AFFILIATES: |
| 2 1 | While in good standing are entitled to: |
| 2 1 1 | Discounts as published on the WI website, excluding: |
| 2 1 1 1 | Affiliate renewal fees |
| 3 | CERTIFICATION AND INSPECTION SERVICES, require: |
| 3 1 | All certification services specified in a project’s contract documents to be requested and paid for before any service is rendered, unless |
| 3 1 1 | Proof is provided at the time of request, that only shop drawing certification is required |
| 3 1 2 | Proof is provided through the project architect or owner indicating that the project certification has been waived. |
| 3 2 | A processing fee of \$75.00 for any corrections required on issued certificates because of improper or incomplete request submissions |
| 4 | CREDIT POLICY: |
| 4 1 | Accredited Millwork Companies (AMC) in good standing may apply for a credit line: |
| 4 1 1 | Application Requires: |
| 4 1 1 1 | Executed WI Credit Application, including: |
| 4 1 1 1 1 | Detailed ownership and contact information |
| 4 1 1 1 2 | Bank and trade information |
| 4 1 1 1 3 | Minimum of 3 trade references, 2 of which shall be from within the construction industry |
| 4 1 1 1 4 | If needed, a signed personal guarantee |
| 4 1 1 2 | Verification of all references |
| 4 1 1 3 | Receipt and review of a valid credit report for the applicant from a national reporting agency: |
| 4 1 1 3 1 | Requested and paid for by WI; except: |
| 4 1 1 3 1 1 | If a personal guarantee is being provided in lieu of the above, guarantor shall provide their own personal credit report. |
| 4 1 1 3 2 | With reasonable explanation of any bankruptcies, tax liens, judgments or collections |
| Continued on next column ▼ | |

Programs and Services Manual

| 7 FINANCIAL CONSIDERATIONS | | | | | | | | | |
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| Continued from previous column ▲ | | | | | | | | | |
| 4 | | | | | | | | | CREDIT POLICY (continued) |
| 4 | 1 | | | | | | | | Accredited Millwork Companies (AMC) (continued) |
| 4 | 1 | 1 | | | | | | | <u>Application Requires</u> (continued) |
| 4 | 1 | 1 | 3 | | | | | | Receipt and review of a valid credit report (continued) |
| 4 | 1 | 1 | 3 | 3 | | | | | With a maximum of 10% of the Trade Accounts, during the last 6 months, at no more than 31 to 60 days beyond term |
| 4 | 1 | 2 | | | | | | | <u>Once approved:</u> |
| 4 | 1 | 2 | 1 | | | | | | Credit limit may be granted of: |
| 4 | 1 | 2 | 1 | 1 | | | | | \$3,000 with: |
| 4 | 1 | 2 | 1 | 1 | 1 | | | | A "Low to Medium Risk" commercial credit score designation, or |
| 4 | 1 | 2 | 1 | 1 | 2 | | | | A "Guarantors" FICA score of 675-739 |
| 4 | 1 | 2 | 1 | 2 | | | | | \$6,000 with: |
| 4 | 1 | 2 | 1 | 2 | 1 | | | | A "Low Risk" commercial credit score designation, or |
| 4 | 1 | 2 | 1 | 2 | 2 | | | | A "Guarantors" FICA score of 740 or higher |
| 4 | 1 | 2 | 2 | | | | | | Payment of charged invoices are due in full by the 10th of the month, following the date of invoice, and |
| 4 | 1 | 2 | 2 | 1 | | | | | Invoices not paid by the 15th of the month are considered delinquent and will be assessed a 10% late fee |
| 4 | 1 | 2 | 3 | | | | | | Requests for service, which when including those charges already on the books, exceed a firm's credit limit, will require COD payment or pay-down of the firms account. |
| 4 | 1 | 2 | 4 | | | | | | Credit lines are subject to biannual review and: |
| 4 | 1 | 2 | 4 | 1 | | | | | Limits may be adjusted (up or down), as may be appropriate based on new credit review |
| 4 | 1 | 2 | 4 | 1 | | | | | May be terminated for: |
| 4 | 1 | 2 | 4 | 1 | 1 | | | | Failure to maintain minimum credit limit requirements |
| 4 | 1 | 2 | 4 | 1 | 2 | | | | Failure to follow payment terms resulting in 2 or more delinquent invoices beyond 60 days within a 4 month time frame, which is further subject to: |
| 4 | 1 | 2 | 4 | 1 | 2 | 1 | | | Small claims actions and/or collection procedures |
| 4 | 1 | 2 | 4 | 1 | 3 | | | | Termination shall be for a period of 12 months, after which time a new application may be submitted |

| 8 DISCIPLINARY ACTIONS | | | | | | | | | |
|----------------------------|---|---|---|---|---|--|--|--|---|
| 1 | | | | | | | | | AFFILIATION and LICENSING are privileges which require adherence to this Programs & Services Manual, WI's Code of Ethics, and Contract Documents including specifications for projects requiring compliance to the NAAWS and/or WI Certification. Failure to follow any of these may result in disciplinary procedures as outlined below. |
| 2 | | | | | | | | | NON-CERTIFICATION: |
| 2 | 1 | | | | | | | | Any AMC not properly and/or timely certifying shop drawings (before submittal), product and/or installation will be subject to: |
| 2 | 1 | 1 | | | | | | | At First Occurrence: |
| 2 | 1 | 1 | 1 | | | | | | Payment of the contractually specified certification fee and a one-time penalty payment of \$500 |
| 2 | 1 | 2 | | | | | | | At Second Occurrence: |
| 2 | 1 | 2 | 1 | | | | | | Payment of the contractually specified certification fee at a non-discounted price, and 50% penalty on such certification fee, and |
| 2 | 1 | 2 | 1 | 1 | | | | | Suspension for 12 months during which time all certification fees will be charged at the non affiliate rate. |
| 2 | 1 | 3 | | | | | | | At Third Occurrence, at Affiliates option: |
| 2 | 1 | 3 | 1 | | | | | | Terminated, subject to a 24 month waiting period before being allowed to reapply for WI Affiliation, or |
| 2 | 1 | 3 | 2 | | | | | | Payment of the contractually specified certification fee at a non-discounted price, and 50% penalty on such certification fee, and |
| 2 | 1 | 3 | 2 | 1 | | | | | Suspension for 12 months during which time all certification costs will be charged at the non-affiliate rate, and |
| 2 | 1 | 3 | 2 | 2 | | | | | Audit of all contracted work for the 12 months prior and after the identified non-certification incident, subject to: |
| 2 | 1 | 3 | 2 | 2 | 1 | | | | Audit evidence being furnished by a CPA, on its letterhead at the affiliates expense, and |
| 2 | 1 | 3 | 2 | 2 | 2 | | | | If during the audit process additional non-certification is discovered in the 12 months prior, to maintain current status the Affiliate will have to pay the certification fees on the discovered projects at the non-affiliate rate. |
| 2 | 1 | 4 | | | | | | | At Fourth Occurrence: |
| 2 | 1 | 4 | 1 | | | | | | Termination subject to: |
| 2 | 1 | 4 | 1 | 1 | | | | | A 24 month waiting period before being allowed to reapply for WI affiliation |
| Continued on next column ▼ | | | | | | | | | |

Programs and Services Manual

| 8 | | DISCIPLINARY ACTIONS | | | | | | | | | | | | | | | | | | | | | |
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| 3 | FAILED INSPECTIONS: | | | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | AMC's are subject to suspension/termination as follows (also see recap table below): | | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 1 | One (1) Failed Inspection, if: | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 1 | 1 CORRECTED - No action | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 1 | 2 NOT CORRECTED - Suspension and Termination Warning Letter, copied to CMP Affiliate | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 2 | Two (2) Failed Inspections, if: | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 2 | 1 Both CORRECTED – Suspension Warning, copied to CMP Affiliate | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 2 | 2 One CORRECTED, one NOT CORRECTED - Suspension and Termination Warning Letter, copied to CMP Affiliate | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 2 | 3 Both NOT CORRECTED - Termination | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 3 | Three (3) Failed Inspections, if: | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 3 | 1 All CORRECTED - Suspension and Termination Warning Letter, copied to CMP Affiliate | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 3 | 2 Two CORRECTED, one NOT CORRECTED: | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 3 | 3 Termination | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 4 | Four (4) Failed Inspections - Termination | | | | | | | | | | | | | | | | | | | | |
| 3 | 1 | 5 | Recap | | | | | | | | | | | | | | | | | | | | |
| | | | <table><tr><th>Number of failed Inspection</th><th>If all Corrected</th><th>If One Not Corrected</th><th>If Two Not Corrected</th></tr><tr><td>1</td><td>No Action</td><td>Suspension and Termination Warning</td><td>n/a</td></tr><tr><td>2</td><td>Suspension Warning</td><td>Suspension and Termination Warning</td><td>Termination</td></tr><tr><td>3</td><td>Suspension and Termination Warning</td><td>Termination</td><td></td></tr><tr><td>4</td><td>Termination</td><td></td><td></td></tr></table> | Number of failed Inspection | If all Corrected | If One Not Corrected | If Two Not Corrected | 1 | No Action | Suspension and Termination Warning | n/a | 2 | Suspension Warning | Suspension and Termination Warning | Termination | 3 | Suspension and Termination Warning | Termination | | 4 | Termination | | |
| | | | Number of failed Inspection | If all Corrected | If One Not Corrected | If Two Not Corrected | | | | | | | | | | | | | | | | | |
| | | | 1 | No Action | Suspension and Termination Warning | n/a | | | | | | | | | | | | | | | | | |
| | | | 2 | Suspension Warning | Suspension and Termination Warning | Termination | | | | | | | | | | | | | | | | | |
| | | | 3 | Suspension and Termination Warning | Termination | | | | | | | | | | | | | | | | | | |
| 4 | Termination | | | | | | | | | | | | | | | | | | | | | | |
| 6 | Failure to correct any non-compliant findings, May result in subsequent requests for CCP Certificate and/or Labels being subject to monitoring. | | | | | | | | | | | | | | | | | | | | | | |
| 2 | Suspension: | | | | | | | | | | | | | | | | | | | | | | |
| 2 | 1 | Notice will be sent advising of the suspension and requesting a list of all outstanding projects requiring certification along with each project's current status, and: | | | | | | | | | | | | | | | | | | | | | |
| 2 | 1 | 1 CMP will be copied | | | | | | | | | | | | | | | | | | | | | |
| 2 | 1 | 2 Includes DAS assistance and training in ensuring future self-certification success. | | | | | | | | | | | | | | | | | | | | | |
| Continued on next page ▼ | | | | | | | | | | | | | | | | | | | | | | | |

| 8 DISCIPLINARY ACTIONS | | | | | | | | | |
|--------------------------------|--|-----------------------------|------------|---|--------------------|---|------------------------------------|---|-------------|
| Continued from previous page ▲ | | | | | | | | | |
| 3 | FAILED INSPECTIONS (continued) | | | | | | | | |
| 3 2 | Suspension (continued) | | | | | | | | |
| 3 2 2 | AMC's may be reinstated after passing three consecutive, paid inspections (at non-discount rate) on new projects requiring WI certification, equal to or exceeding Custom Grade, or: | | | | | | | | |
| 3 2 3 | Projects equal to or exceeding Custom Grade but not requiring WI certification may be used in lieu of the above, for a \$500.00 fee each | | | | | | | | |
| 3 2 3 1 | DAS will continue inspecting those projects for which the process was begun during the term of suspension | | | | | | | | |
| 3 3 | Termination: | | | | | | | | |
| 3 3 1 | Notice will be sent advising of the termination. | | | | | | | | |
| 3 3 2 | A Terminated firm must wait a minimum of 24 months before being eligible to reapply for AMC status. | | | | | | | | |
| 3 4 | CMP's, as a firms inspector of record, are subject to suspension / termination as follows (also see recap table below): | | | | | | | | |
| 3 4 1 | One (1) Failed Inspection - Suspension Warning Letter advising and suspension if they are signatory to a second failed inspection | | | | | | | | |
| 3 4 2 | Two (2) Failed Inspections - Suspension for a period of six months during which time they can NOT request certificates or labels and termination if they are signatory to a third failed inspection | | | | | | | | |
| 3 4 3 | Three (3) Failed Inspections - Termination, subject to reinstatement after: | | | | | | | | |
| 3 4 3 1 | A 12 months waiting period | | | | | | | | |
| 3 4 3 2 | Re-passing the CMP examination | | | | | | | | |
| 3 4 3 3 | DAS assistance and training in ensuring future self-certification success. | | | | | | | | |
| 3 5 | Recap <table border="1"> <thead> <tr> <th>Number of failed Inspection</th><th>Subject to</th></tr> </thead> <tbody> <tr> <td>1</td><td>Suspension Warning</td></tr> <tr> <td>2</td><td>Suspension and Termination Warning</td></tr> <tr> <td>3</td><td>Termination</td></tr> </tbody> </table> | Number of failed Inspection | Subject to | 1 | Suspension Warning | 2 | Suspension and Termination Warning | 3 | Termination |
| Number of failed Inspection | Subject to | | | | | | | | |
| 1 | Suspension Warning | | | | | | | | |
| 2 | Suspension and Termination Warning | | | | | | | | |
| 3 | Termination | | | | | | | | |

Programs and Services Manual

| 9 APPEAL PROCEDURES | |
|---------------------|--|
| 1 | APPLICANTS MAY BE DENIED WI affiliation for cause by the board or its designee with proper notification and right of appeal, subject to being: |
| 1 1 | In writing |
| 1 2 | To the CEO of the Institute, if still dissatisfied: |
| 1 2 1 | To the WI Executive Committee whose decision is final. |
| 2 | INSPECTION FINDINGS and CERTIFICATION ISSUES , may be appealed, subject to being: |
| 2 1 | Submitted first to the applicable Director of Architectural Services (DAS), if dissatisfied: |
| 2 1 1 | To the CEO of the Institute, if still dissatisfied: |
| 2 1 1 1 | To the WI Technical Committee, if still dissatisfied: |
| 2 1 1 1 1 | To the WI Board of Directors whose decision is final. |
| 3 | AFFILIATES may be FINED and/or SUSPENDED for cause by the Board or its designee, subject to proper notification and right of appeal being: |
| 3 1 | In writing |
| 3 2 | Submitted within 15 days of receipt of the denial or reprimand letter, however: |
| 3 2 1 | Appeals submitted after 15 days will be disregarded |
| 3 3 | Submitted to the CEO of the Institute for review, if dissatisfied with the CEO's determination then: |
| 3 3 1 | Submitted to the WI Board or its designee whose decision is final |
| 4 | AFFILIATES may be TERMINATED for cause by the Board or its designee, subject to proper notification and right of appeal: |
| 4 1 | Termination shall occur only after the affiliate has been given a fifteen-day prior written notice of the proposed termination and the reasons therefore: |
| 4 2 | The notice shall advise the affiliate of the proscribed hearing procedure, which allows an affiliate to be heard, in writing, not less than five days before the effective date of the discipline by the Board or its designee |
| 4 3 | If a hearing is requested: |
| 4 3 1 | It shall be in writing, and: |
| 4 3 1 1 | It shall be decided by the WI Board or its designee (who shall be an unbiased third party appointed on an ad hoc basis) based on the written record presented by the Affiliate Review Committee and the Affiliate |
| 4 3 1 2 | Decision of the Board or its designee shall be final |

| 10 CONTRACT INSPECTORS | |
|------------------------|--|
| 1 | Typically the Institute hires full time employees as its Directors of Architectural Services (DAS); however, if needed based on specific needs, it is authorized to use contract inspectors, subject to: |
| 1 1 | Minimum Requirements |
| 1 1 1 | Being retired or generally available during the week at relatively short notice |
| 1 1 2 | Not being employed in the Architectural Woodwork Industry |
| 1 1 3 | Having acceptable automobile, accident, medical and personal liability insurance |
| 1 1 4 | Owning or having access to a PC based computer capable of running Microsoft Access, along with having basic computer skills |
| 1 1 5 | Passing the AMC exam with a score of 85% or better and having a successful web interview |
| 1 1 6 | Executing the WI Independent Contractor Agreement |
| 1 1 7 | Agreeing to abide by WI Certification/Inspection Policies and Procedures |
| 1 1 8 | Observing and assisting in an inspection conducted by a DAS within CA or NV for which: |
| 1 1 8 1 | WI pays for room, board and travel expenses; however: |
| 1 1 8 1 1 | Applicant is not compensated for their time |
| 1 1 9 | WI Inspection Program training |
| 1 1 10 | First inspection by contract inspector to be accompanied by a DAS. |
| 1 2 | Compensation & Expense Reimbursement/Allowance |
| 1 2 1 | Per inspection day reimbursement, plus: |
| 1 2 1 1 | Reimbursement of economy flight and economy rental car expenses |
| 1 2 1 2 | Daily lodging and meal allowance per overnight stay. |

APPENDIX

EXAMPLES OF WI AFFILIATE LOGOS

Accredited Millwork Company Logo



Certified Millwork Professional Logo



Millwork Industry Partner Logo



EXAMPLE OF WI LISTED PRODUCT LOGO



EXAMPLES OF WI CERTIFIED COMPLIANCE LABELS

Shop Drawing Label



Shop Drawing Digital Label



Casework Label



HPDL Countertop Label – Flat



HPDL Countertop - Formed



Solid Surface Countertop



Laboratory Countertop



EXAMPLE OF WI MONITORED COMPLIANCE LABEL



Example of General CCP Certificate issued by WI Staff



WOODWORK INSTITUTE



The undersigned certifies that fabrication and/or installation of the following item(s) were or will be furnished to conform to the North American Architectural Woodwork Standards' quality grade(s) noted, as may have been modified by the plans and specifications:

Product Listing

for
PROJECT NAME
CITY/STATE

designed by
DESIGN PROFESSIONAL NAME

Subcontractor:
SHOP NAME

WI Project No.: Project #00000000

Certified Compliance Certificate No.: Cert.#000000 Issued on DATE

CC Labels Issued: 00000000

WI Inspector's Signature

Print Name

NOTICE: Issuance and application of Woodwork Institute Certified Compliance Certificates and Labels are necessarily based solely upon visual observations for conformity to the applicable architectural plans, documents, and/or change orders approved in writing by the architect or other authorized representative of the owner. Because all inspections are limited to visual observations only, the Institute cannot and does not verify the structural integrity of product fabrication or installation. Certified Compliance Certificates and Labels only assure those features that can be visually observed at the time of the inspection, and do not in any way verify the structural integrity of product fabrication or installation.

Registered in the office of the Woodwork Institute, PO Box 980247, West Sacramento, CA 95798-0247

Example of General CCP Certificate issued by WI Licensee



WOODWORK INSTITUTE



Certified Compliance
Quality Assurance

The undersigned certifies that fabrication and/or installation of the following item(s) were or will be furnished to conform to the North American Architectural Woodwork Standards' quality grade(s) noted, as may have been modified by the plans and specifications:

Product Listing

for
PROJECT NAME
CITY/STATE

designed by
DESIGN PROFESSIONAL NAME

Woodwork Institute Affiliate:
SHOP NAME

WI Project No.: Project #00000000

Certified Compliance Certificate No.: Cert.#00000 Issued on DATE

CC Labels Issued: 00000000

Certified Millwork Professional (CMP)
Signature

Certified Millwork Professional (CMP)
Name

NOTICE: Issuance and application of Woodwork Institute Certified Compliance Certificates and Labels are necessarily based solely upon visual observations for conformity to the applicable architectural plans, documents, and/or change orders approved in writing by the architect or other authorized representative of the owner. Because all inspections are limited to visual observations only, the Institute cannot and does not verify the structural integrity of product fabrication or installation. Certified Compliance Certificates and Labels only assure those features that can be visually observed at the time of the inspection and do not in any way verify the structural integrity of product fabrication or installation.

Registered in the office of the Woodwork Institute, PO Box 980247, West Sacramento, CA 95798-0247

Example of Door CCP Certificate issued by WI Staff



WOODWORK INSTITUTE



Certified Compliance
Quality Assurance

The undersigned certified that the following door(s) conform to the Woodwork Institute grade(s) noted as may have been modified by the Architect's plans and specifications:

FLUSH DOORS
Quantity: 00
Grade: Custom
Manufactured Under Suppliers PO#: nnnnn

STILE AND RAIL DOORS
Quantity: 0
Grade: Premium
Manufactured Under Suppliers PO#: nnnnn

DOOR INSTALLATION
Installation Of The Doors Noted Herein Is Certified For The Following Grade: N/A

for
PROJECT NAME
CITY/STATE

designed by
DESIGN PROFESSIONAL NAME

Door Supplier
SHOP NAME

Door Manufacturer
MANUFACTURER NAME

WI Project No.: 00000000
Certified Compliance Certificate No.: 00000 *Issued on* DATE

WI Inspector's Signature

Print Name

NOTICE: Issuance and application of Woodwork Institute Certified Compliance Certificates and Labels are necessarily based solely upon visual observations for conformity to the applicable architectural plans, documents, and/or change orders approved in writing by the architect or other authorized representative of the owner. Because all inspections are limited to visual observations only, the Institute cannot and does not verify the structural integrity of product fabrication or installation. Certified Compliance Certificates and Labels only assure those features that can be visually observed at the time of the inspection, and do not in any way verify the structural integrity of product fabrication or installation.

Registered in the office of the Woodwork Institute, PO Box 980247, West Sacramento, CA 95798-0247

Example of Door CCP Certificate issued by WI Licensee



WOODWORK INSTITUTE



The undersigned certifies that the following door(s) conform to the Woodwork Institute grade(s) noted as may have been modified by the Architect's plans and specifications:

FLUSH DOORS
Quantity: 0
Grade: Custom
Manufactured Under Suppliers PO#: nnnnn

STILE AND RAIL DOORS
Quantity: 0
Grade: Custom
Manufactured Under Suppliers PO#: nnnnn

DOOR INSTALLATION
Installation Of The Doors Noted Herein Is Certified For The Following Grade: Custom

for
PROJECT NAME
CITY/STATE

designed by
DESIGN PROFESSIONAL NAME

Door Supplier
SHOP NAME

Door Manufacturer
MANUFACTURER NAME

WI Project No.: 00000000
Certified Compliance Certificate No.: 00000 Issued on DATE

Certified Millwork Professional
Signature

Certified Millwork Professional Printed
Name

NOTICE: Issuance and application of Woodwork Institute Certified Compliance Certificates and Labels are necessarily based solely upon visual observations for conformity to the applicable architectural plans, documents, and/or change orders approved in writing by the architect or other authorized representative of the owner. Because all inspections are limited to visual observations only, the Institute cannot and does not verify the structural integrity of product fabrication or installation. Certified Compliance Certificates and Labels only assure those features that can be visually observed at the time of the inspection, and do not in any way verify the structural integrity of product fabrication or installation.

Registered in the office of the Woodwork Institute, PO Box 980247, West Sacramento, CA 95798-0247

Example of MCP Certificate issued by WI Office



WOODWORK INSTITUTE



*The undersigned certifies that fabrication and/or installation of the following item(s) were
furnished in compliance with the North American Architectural Woodwork Standards' quality grade(s)
noted, as may have been modified by the plans and specifications:*

Product Listing

for
PROJECT NAME
CITY/STATE

designed by
DESIGN PROFESSIONAL NAME

Subcontractor:
SHOP NAME

WI Project No.: **Project #00000000**

Monitored Compliance Certificate No.: **Cert.#00000** *Issued on* **DATE**

MC Labels Issued: **00000000**


Woodwork Institute's Inspector of Record

Heather Zertuche, Dir. of Cert./Insp. Services

NOTE: Issuance and application of Woodwork Institute Monitored Compliance Certificates and Certified Compliance Labels are necessarily based solely upon visual observations for conformity to the applicable architectural plans, specifications, and/or change orders approved in writing by the architect or other authorized representative of the owner. Because all inspections are limited to visual observations only, the Institute cannot and does not verify the structural integrity of product fabrication or installation.

Registered in the office of the Woodwork Institute, PO Box 980247, Walnut Sacramento, CA 95798-0247

Example of CSIP Certificate issued by WI Staff



WOODWORK INSTITUTE



Seismic Compliance
Casework Installation

The undersigned certifies that anchorage of the following casework conforms to the minimum requirements of the Institute's OSHPD (Office for Statewide Health Planning and Development) Casework Anchorage Pre-Approval OPA-2649-10 dated 4/18/2013 which also conforms to the California DSA (Division of State Architecture) requirements by acceptance under their DSA IR-A-5 (rev 10-05-12):

Seismic Installation of Plastic Laminate Casework

for
PROJECT NAME
CITY/STATE

designed by
DESIGN PROFESSIONAL NAME

Subcontractor:
SHOP NAME

WI Project No.: **Project #00000000**

Seismic Installation Certificate No.: **Cert.#00000** *Issued on* **DATE**

WI Inspector's Signature

Print Name

NOTICE: Issuance and application of Woodwork Institute Modified Compliance Certificates and Certified Compliance Labels are necessarily based solely upon visual observations for conformity to the applicable architectural plans, specifications, and/or change orders approved in writing by the architect or other authorized representative of the owner. Because all inspections are limited to visual observations only, the Institute cannot and does not verify the structural integrity of product fabrication or installation.

Registered in the office of the Woodwork Institute, PO Box 980247, West Sacramento, CA 95798-0247

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