

# Technical Bulletin

## June 2020

### Welcome to the ecmk quarterly Technical Bulletin

In this issue we cover:

- Government Instructions & Publications
- CPD Uploading & Evidence of Completion
- PAS2035: Retrofit
- PAS2035: Retrofit Training
- Upcoming Training

Please do contact us if you would like any other subjects covered in future bulletins.

Many thanks and we hope you enjoy the bulletin.

*Stephen Farrow*  
Scheme Manager

## Government Instructions & Publications

### PEPA Welcomes Government Advice on Energy Performance Certificates

The Property Energy Professionals Association (PEPA) is a trade body which represents companies that are engaged in the provision of Energy Performance Certificates (EPCs), Display Energy Certificates (DECs) and Air Conditioning Inspection Reports (ACIRs).

**The Property Energy Professionals Association (PEPA) has welcomed the Government advice on meeting the regulatory requirement to secure a valid Energy Performance Certificate (EPC) on marketing a property for sale or rent during the Coronavirus outbreak.**

The Advice relates to commercial as well residential properties. The legal requirement to obtain an EPC before selling or letting a property remains in place, so it is important that both those who are commissioning an EPC and the Energy Assessors who produce them are aware of the Government's advice in these difficult times. The health and wellbeing of all parties is of prime concern for PEPA, its members and the Assessors they serve.

**Andrew Parkin, PEPA Chairman, said:**

*"We welcome the Government Advice on the production of EPCs in these difficult times and it is reassuring that the guidance PEPA had already provided for its members, and for Energy Assessors, dovetails with the Advice which has now been published. With the property market continuing to operate, and EPCs being integral to the process of selling and renting properties, it is really important that Assessors are clear about what is expected of them."*

**Parkin added:** *"Of course, the number of EPCs being produced is a fraction of what they were just a few weeks ago, and many assessors are already feeling the serious financial impact of lower volumes, alongside all other parties involved in the property market. As many operate through small company structures, we have written to the Chancellor asking that the Government support for the self-employed is extended to cover the dividends as well as wages which provide income to those affected".*

PEPA has provided a special Resource Kit for Energy Assessors which is available [here](#).

For the latest updates and guidance from PEPA regarding COVID-19 – [click here](#)

## COVID-19: Government guidance on moving home for energy assessors

This guidance refers to the work of energy assessors carrying out property assessments.

### Key points for Energy Assessors when carrying out assessments:

- follow the latest government guidance for working in other people's homes
- follow all public health guidance on social distancing. Companies should ensure employees understand how to operate safely and communicate this to customers
- contact the owners of the property to be surveyed prior to the survey to make sure they understand which areas will be surveyed and ensure that all doors and access panels are open and surfaces have been cleaned with household cleaning products in line with public health advice. During a visit, members of the household should follow social distancing guidance, staying 2 metres away wherever possible, for example by staying in another room
- wash their hands immediately upon entering the property, using separate towels or paper towels which need to be washed or disposed of safely after use
- **not** carry out assessments if they have coronavirus symptoms, however mild, or if they have been asked to self-isolate.

## COVID-19: Government guidance for employees, employers and businesses

This guidance will assist employers and businesses in providing advice to their staff on:

- coronavirus COVID-19
- how to help prevent spread of COVID-19
- what to do if someone has symptoms of COVID-19 has been in business settings
- eligibility for sick pay

This guidance also provides details of support available to businesses including:

- a Coronavirus Job Retention Scheme
- deferring VAT and Self-Assessment payments
- Self-employment Income Support Scheme
- statutory sick pay relief package for small and medium-sized enterprises (SMEs)
- a 12-month business rates holiday for all retail, hospitality, leisure and nursery businesses in England
- small business grant funding of £10,000 for all business in receipt of small business rate relief or rural rate relief
- grant funding of £25,000 for retail, hospitality and leisure businesses with property with a rateable value between £15,000 and £51,000
- the Coronavirus Business Interruption Loan Scheme to support long-term viable businesses who may need to respond to cash-flow pressures by seeking additional finance
- a new lending facility from the Bank of England to help support liquidity among larger firms, helping them bridge coronavirus disruption to their cash flows through loans
- the HMRC Time To Pay Scheme to help with tax

## COVID-19: Updated Guidance from MHCLG related to EPC's (last updated 19 May)

Further to the moving home guidance, MHCLG has updated its guidance on meeting the regulatory requirement to secure a valid Energy Performance Certificate on marketing a property during the Coronavirus (COVID-19) outbreak.

Energy assessments can continue in both domestic and non-domestic properties and should only be conducted in accordance with the latest Government guidance:

The full updated Government guidance for Energy Performance Certificates – [click here](#)

- Government advice on staying alert and staying safe during this period – [click here](#)
- Government advice on working safely during coronavirus (COVID-19) – [click here](#)
- Government advice on home moving during the coronavirus (COVID-19) – [click here](#)

For general Government guidance related to COVID-19 – [click here](#)

## COVID-19: Pan-Industry Guidance – Reopening the Home Moving Market Safely

A collaborative pan-industry guidance document from the residential sector and professional organisations' representatives has been published in relation to the impact of COVID-19. The document is relevant to property agents, lenders, mortgage advisers, property lawyers/conveyancers, surveyors, **energy assessors**, property managers, home removal and associated professionals such as contractors involved in the property development, management and the home moving processes.

To read to full document (edition dated 13.05.20) – click below:



FINAL Industry and  
Consumer Covid-19

Endorsed by:



**Rebuilding the Energy Performance of Buildings Registers**  
*Information from the MHCLG Digital Blog (published 19 May, by Kev Keenoy)*

## Energy Performance Certificate

1 Some Street		<b>Energy Rating</b>  <b>E</b>
Post-Town1 AO OAA		
Valid until 04 05 2016	Certificate Number 3756-1093-2386-9237-3268	

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### Contents

- Rules on letting this property
- Energy performance rating for this property
- Breakdown of property's energy performance
- Environmental impact of this property
- How to improve this property's energy performance
- Estimated energy use and potential savings
- Contacting the assessor and accreditation scheme

When an Energy Performance Certificate (EPC) is produced for a building, a lot of useful data about the building is collected by the energy assessor, and the Energy Performance of Buildings Register is the place where this data is stored. This data is used in research and policy making to improve the energy performance of the UK's building stock, and following [a hiatus from 2017-2019 while some data licensing issues were resolved](#), a set of energy performance data is again regularly published by the department on [Open Data Communities](#).

Until now the operation of the register has been outsourced and run as 4 separate services:

- England & Wales Domestic Register
- England & Wales Non-Domestic Register
- Northern Ireland Domestic Register
- Northern Ireland Non-Domestic Register

Rather than re-procure these services as outsourced contracts, The Ministry of Housing, Communities and Local Government (MHCLG) has decided to bring ownership of the register service in-house. We will also consolidate these 4 registers into a single register for England, Wales and Northern Ireland (Scotland still has [its own EPC register](#)).

This is the first time MHCLG has taken the running of a digital service back in-house and redeveloped it from the ground up, following the user-needs driven principles of the [Digital Service Standard](#). This makes it a significant step in our department's digital transformation journey.

In the future we will improve the usefulness of the data published by linking the energy performance data with Ordnance Survey's unique property reference numbers (UPRNs), [which are being licenced as open data from July 2020](#). This will make it much easier for data users to link energy performance data with other datasets about buildings.

### Beta phase “inception”

In October 2019 development began on the [beta phase](#) of the new service. We brought together a new multidisciplinary agile team and dedicated the first couple of weeks to a “project inception”. During this time the team:

- reviewed the outcomes from the discovery and alpha phase projects
- familiarised ourselves with the wider landscape of EPCs and energy performance data
- ran a series of workshops with as wide a range of stakeholders as possible, to get a deeper understanding of user needs
- came up with a set of “known unknowns” that would need further research and exploration during the beta build
- made key initial technology and
- architectural decisions



We chose to use common and widely-understood free and open source technologies that were already known to most of the team. These include the [Ruby](#) programming language, [Sinatra](#) web application framework, and [PostgreSQL database](#). These choices should help reduce barriers to bringing new people on to the team in the future.

For hosting, we chose to run the new service on [GOV.UK Platform as a Service](#). This allows the team to spend less time managing low-level technical infrastructure and more time delivering the core register service. It should also make the service easier to maintain in the future.



## Beta phase development approach

Since inception, we have been building out the new service following [Government Digital Service \(GDS\) guidelines](#) for agile software development and industry best practice. Our working practices include:

- **coding in the open** – we use [Git](#) for source code version control, and all of our code is open source and can be found on the [communitiesuk GitHub organisation](#)
- writing loosely-coupled software that follows the [clean architecture principles](#)
- [pair programming](#) and [test-driven development](#) as standard. This is essential for us to be able to do trunk-based development
- **trunk-based development** – rather than developers working on code “branches” that are peer reviewed prior to merging into the “master” branch, pairs of programmers are empowered to push their changes straight to “master”
- **continuous deployment** – once a code change is pushed to master it is automatically released through a pipeline to production, as long as the automated tests pass successfully along the way (we currently release code to production up to about 40 times a day)

As with any project, we had to invest time upfront in doing the groundwork of setting up infrastructure and deployment pipelines, bootstrapping and connecting applications, and developing a security and authentication strategy. Now this groundwork is complete we are in a good position to quickly develop new features and iterate what we already have based on feedback from users.

## CPD Uploading & Evidence of Completion

ecmk members are required to attend a minimum of **10 hours** of Continual Personal Development per year in order to keep up with this constantly evolving industry. An additional 5 hours is required per additional qualification, for example a DEA and NDEA will require a minimum of 15 hours per year of CPD.

All ecmk members are also entitled to **4 hours of FREE CPD each year**.

A recent audit of assessor CPD records has highlighted some inconsistencies with members' CPD and the records provided.

Members are reminded that:

- CPD must be relevant to the qualification.
- Any certificates must be uploaded with the claimed hours.
- If the CPD is self-learning or reading, then please use the CPD planner provided on Assessor Hub, ACC-105a, or a brief summary of the learning outcomes should be provided.

Please refer to the following scheme documents:

**The Scheme Guidance Document ACC-104**

**The CPD Policy ACC-403**

**The CPD Planner ACC-105a**

*(These can be found on the Scheme Documents Tab on Assessor Hub)*



## PAS2035: Retrofit

### What is it?

A review carried out in 2015 by leading industry experts into how public and privately funded domestic retrofit projects were delivered, resulted in a report “Each Home Counts”, which made recommendations covering:

- Consumer Protection
- Advice & Guidance
- Quality & Standards
- Skills & Training
- Compliance & Enforcement
- Insulation & Fabric
- Smart Metering
- Home Energy Technologies
- Application to Social Housing

From this report a number of workgroups were started to investigate the way forward in solving these recommendations.

The “Each Home Counts” report is geared to ensure the installed measures are the best and most appropriate for that particular property and its occupants as previous energy efficiency policies were criticized for taking little account of what is best for the home or occupants but to maximise the grant funding mechanism by installing costly and in some cases, unnecessary measures.

Energy Company Obligation was at the heart of this whereby new, energy efficient boilers or heating systems were installed in properties that were not insulated which made little sense. Properties were not checked for suitability before measures were installed which led to failures and in some cases remedial works being carried out to bring the property back to its original state due to bad workmanship and or the properties poor state of repair.

The governments Net Zero commitment by 2050 can only be achieved if each property’s full potential is recognised. At present ECO has delivered on average just over 1 measure per household but for Net Zero to be successful and within the timescale set, this needs to be increased to 3 measures per household or dwelling.

PAS2035 will ensure that consumers receive good advice and that properties are assessed by trained qualified and competent Retrofit Assessors who will consider the condition of the property and its suitability for improvement, not just the energy saving opportunities. This standard will also lay out a medium-term improvement plan for each property, detailing all works which will maximise the energy efficiency potential, including essential maintenance works to uphold the effectiveness and durability of the installed measure.

This will create a much greater chance of meeting the Governments policy within the timescales set. Costs will be reduced as more measures are installed. More preparation

work will be required for improving the homes energy efficiency and by making sure only suitable properties have retrofit works carried out this will reduce the cost of failures and remedial works.



[www.trustmark.org.uk](http://www.trustmark.org.uk)

### Shall I get involved?

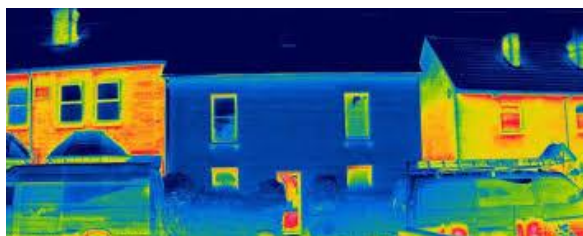
Any dwellings requiring energy efficient retrofit works will need to be assessed by a Retrofit Assessor who will collect and provide property information and data for Retrofit Coordinators to enable a relevant improvement plan to be developed.

A little like the Green Deal process, dwellings will be assessed using RdSAP to support the data gathered along with a Property Condition report detailing the suitability of the property for any improvements and an Occupancy assessment after detailed discussions with the client, on how energy is used within that dwelling presently.

From this data, the Retrofit Assessor can determine which installation measures are most suitable for that particular property and also feed this data back to any other parties involved within the PAS2035 process, ie: the Retrofit Coordinator, amongst other interested parties.

The transition to Retrofit Assessor is quite a simple one if you are already an acting DEA (Domestic Energy Assessor) or GDA (Green deal Advisor). This is due to many of the practices as a DEA being implemented as a Retrofit Assessor, so for example a Retrofit Assessor will need an RdSAP energy report as well as a detailed floor plan accompanied by a full property condition report recording a room by room account of the condition of the properties windows, walls and services etc. A full Occupancy assessment will also be required determining how the property is used and recording fuel bill data.

DEAs are well placed to becoming Retrofit Assessors as the knowledge and experience of carrying out energy assessments is forefront in the retrofit Assessor Training.



For further information regarding the Retrofit Assessor Training please [click here](#)

### **Retrofit Coordinator**

In order to comply with PAS2035, all retrofit projects will be required to be managed by an approved Retrofit Coordinator, responsible for overseeing the assessment of dwellings as well as the subsequent specification, monitoring and evaluation of energy efficient measures. The Coordinator will also manage the retrofit project from inception to completion, liaising with all parties involved, ensuring effective project management. The building owner, Retrofit Assessors, Designers and Installers will all need to be a part of the overall development process to ensure a smooth retrofit package is installed in accordance with the PAS2035 process.

The Retrofit Coordinator will compile a risk assessment for each dwelling, as well as a project plan complete with a medium term improvement and maintenance plan covering a 30 year period from the installation of any retrofit measures.

Professionals from a range of backgrounds can ultimately train to become a Retrofit Coordinator and can then specialise in delivering whole house retrofit projects under the PAS2035 guidance which is fully backed by TrustMark and the Governments 2050 Net Zero commitment. Demand within this area for qualified individuals, Coordinators and Assessors, will increase over time and with greater knowledge and exposure to the PAS2035 derivative.

For further information regarding the Retrofit Coordinator Training please [click here](#)



## PAS2035: Retrofit Training

PAS2035 is set to change the way domestic retrofitting is carried out in the UK.

ecmk are delivering a range of courses and events based around the implementation of the PAS2035 standard.

PAS2035 is the overall certification document within the retrofit standards framework and all TrustMark holders will be required to comply with this standard when carrying out any domestic retrofit work. Climate change targets suggest a substantial reduction of greenhouse gasses need to be made by us all. This means improvements must be made to the existing building stock within the UK which equates to around 27 million domestic buildings needing retrofitting works to be carried out.

New EU objectives means that PAS2035 will be a major mechanism in achieving the Near Zero Energy Buildings target (NZEB)

Retrofitting is one mechanism that is proving crucial to improving quality in the built environment and there is an increasing opportunity to professionalise this type of work.

ecmk have developed formal training and certification to offer energy assessors. ecmk's PAS2035 Retrofit Assessor Scheme delivers training and CPD sessions geared around the Retrofit Assessor Role where by DEAs will be authorized to carry out a Retrofit Assessment which is a non-intrusive on site assessment allowing a retrofit coordinator to carry out a Medium Term Improvement Plan based on the evidence gathered from the assessment.

### **PAS2035 Retrofit Assessor Training**

**£250 + VAT**

**4 Day ONLINE COURSE**

If you have any further questions, please contact us via email: [training@ecmk.co.uk](mailto:training@ecmk.co.uk)

## Upcoming CPD Webinars

	June	Cost (+ vat)*
Walls, Construction, Party & Alternative	Fri 5 @ 1600-1700	£15.00
Advanced Heating	Fri 12 @ 1600-1700	£15.00
Heating Controls	Fri 19 @ 1600-1700	£15.00
Flats & Maisonettes	Fri 26 @ 1600-1700	£15.00

## Upcoming Courses

	June	Cost (+ vat)*
PAS2035 Retrofit Assessor *ONLINE* 4 Day Course	Mon 1 - Thurs 4	£250.00
DEA Bootcamp (CPD) *ONLINE* 1 Day Course	Wed 3	£39.95
CERT DEA *ONLINE* 4 Day Course	Mon 8 – Thurs 11	£750.00
PAS2035 Retrofit Assessor *ONLINE* 4 Day Course	Mon 15 - Thurs 18	£250.00
DEA Bootcamp (CPD) *ONLINE* 1 Day Course	Wed 17	£39.95

*\*Costs listed are for ecmk members*

Click [here](#) to find out more and to book your place!

*If you are looking for something more bespoke, we can deliver courses nationwide.*

For further information, more course dates and to book your place:

Email: [training@ecmk.co.uk](mailto:training@ecmk.co.uk) or Visit: [www.ecmk.co.uk/training](http://www.ecmk.co.uk/training)

