

TrustMark

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Timelines for New Requirements

- **Installers must be TrustMark registered from 1st January 2020**  
Measures will need to be lodged in the TrustMark Data Warehouse
- **Incorporate revised PAS2030 & New PAS2035**  
Transition period until end of June 2021  
20% uplift on deemed scores during transition is certified to 2019 standards
- **New Appropriate Guarantees for Complex Measures from 1<sup>st</sup> July 2020**  
Underfloor Insulation & Room-in-Roof Insulation 25-year insurance backed  
2-year warranty for all other measures
- **Changes to First Time Central Heating**  
Increase lifetime from 12 to 20 years  
Cavity Wall Insulation & Loft Insulation must be installed “where possible”  
Allow in private rented F & G rated properties
- **Retention of an uplift for Broken Boilers delivered with Insulation outside the Broken Heating Cap**  
Uplift reduced from 400% to 200%

On and after 1<sup>st</sup> January 2020

- Installers **must** be TradeMark registered
- All measures must be lodged in the Data Warehouse
- All FTCH changes will come into force

On and after 1<sup>st</sup> July 2020

- All Room-in-Roof and Underfloor Insulation measures must be accompanied by a 25 year Appropriate Guarantee

Up to and including 30<sup>th</sup> June 2021

- Subject to transitional arrangements and where applicable, installers must comply, and be certified as compliant, with either PAS2030:2017 or the new PAS2035:2019 standards
- All measures completed by installers who are certified as compliant with PAS2030:2019 and comply with both PAS2030:2019 and PAS2035:2019 will receive a 20% score uplift during this period

On and after 1<sup>st</sup> July 2021

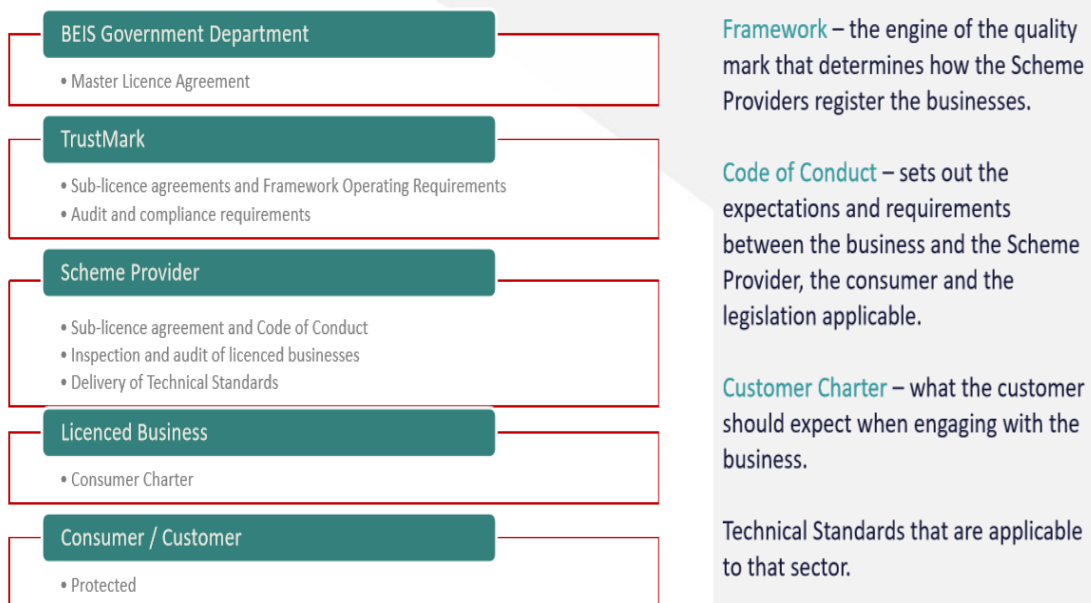
- Where applicable, installers must be certified as compliant with PAS2030:2019 and must comply with both PAS2030:2019 and PAS2035:2019

## Registering with TrustMark

- Businesses do not register directly with TrustMark, registration can only be through a Scheme Provider
- On-boarding is **NOT** an automatic process as standards need to be assessed and met
- It is likely that for most organisations delivering ECO measures that their route to TrustMark will be via their existing PAS:2030 certification body
- Your Scheme Provider will focus on assessing 'installers' against the requirements as published in Annex A of the Framework Operating Requirements. Annex A is the TrustMark Mandatory minimum criteria for applicant and/or Registered Businesses
- PAS2030:2017, PAS2035:2019 and PAS2030:2019 transitional arrangements, compliance and certification requirements are published in Annex
- Other Requirements Include: - Scheme Provider rules - The TrustMark Code of Conduct - The TrustMark Customer Charter
- Once registered with TrustMark, please send a copy of the certificate to [Technicalmonitoring@anESCO.co.uk](mailto:Technicalmonitoring@anESCO.co.uk)



### TrustMark – How it Works



## Data Warehouse Overview

The Data Warehouse aims to address a range of market risks in response to the recommendations of the [Each Home Counts review](#) commissioned by Government in 2015 and published in December 2016.

### Overview

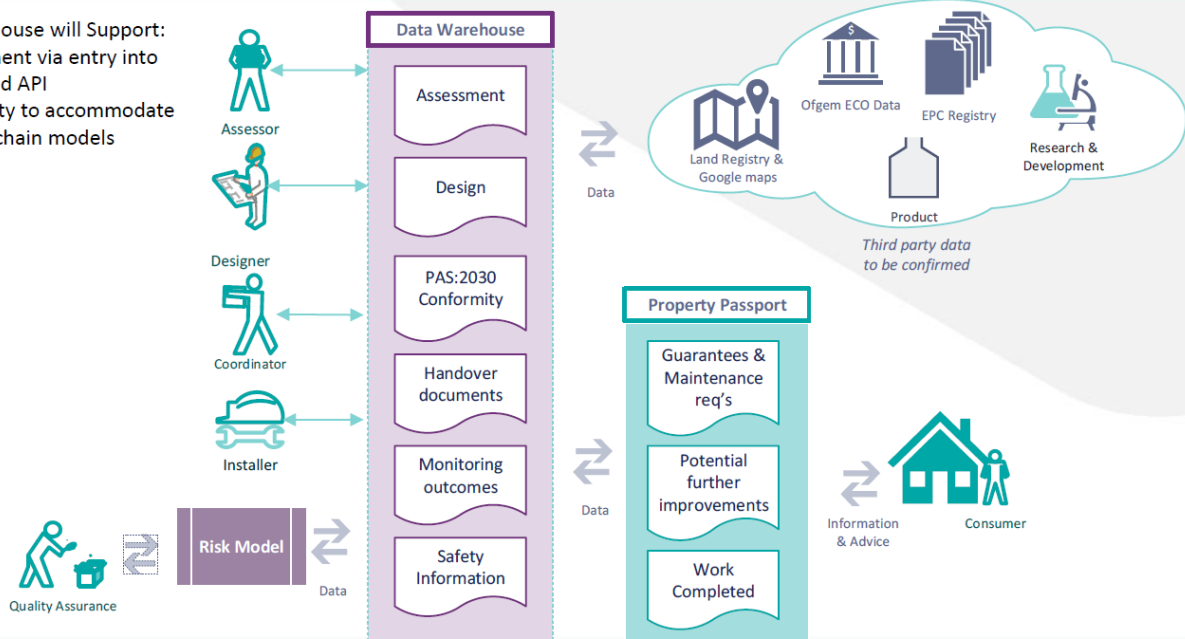
To deliver the above, a **Data Warehouse** has been created – to act as the industry facing repository of information about work undertaken and the property being improved and a **Property Hub** to act as the consumer-facing platform where they can access a 'log book' about their property – helping establish who did what and when.



## Data Warehouse - Overview

Data Warehouse will Support:

- Lodgement via entry into form and API
- Flexibility to accommodate supply chain models



# TRUSTMARK

## Data Warehouse Lodgement

- **Lodgement of work – PAS2030:2017 (Installer)**  
Declaration of compliance by the registered installing business
- **Lodgement of work – PAS2035:2019 (Retrofit Coordinator)**  
Declaration of compliance to PAS2030:2019 provided by the registered installing business to the Retrofit Coordinator who will declare compliance for the 'project'
- **Lodgement fee = £8.00 (ex VAT)**



## Data Warehouse - Lodgement

Accessed via TrustMark portal:

- Flexibility to accommodate supply chain models
- Lodgement via entry on screen and via API

The screenshot shows the TrustMark Business Portal interface. At the top, there is a search bar and a 'Find a trader' button. Below this, the 'Business Portal' section includes links for 'Portal Help', 'Order Branded Materials', and 'Benefits of TrustMark'. A prominent button labeled 'Lodge work in Data Warehouse' is visible. Below the portal navigation, there is a 'My Lodgements' table with the following data:

Property Number	Postcode	Status	Created	Actions
	CF42 6DG	Not submitted	18/09/2019	<a href="#">Edit</a> <a href="#">View</a>
	SW9 0PU	Complete and Paid	17/09/2019	<a href="#">View</a>

Callouts from the image indicate: 'TrustMark registered businesses Click to log into Data Warehouse' pointing to the 'Lodge work in Data Warehouse' button, and 'Help about how to use the Data Warehouse is available here' pointing to the 'Help' link in the top right corner.

This screenshot shows a 'Terms of Use' dialog box with the following text: 'The TrustMark Data Warehouse (Data Warehouse) is a Government supported initiative and has been developed in response to The Each Home Counts Review. The core objectives are to underpin consumer protection and quality of work delivered in homes through facilitating greater accountability delivered. TrustMark respects the rights and privacy of all data subjects. The data is provided for the delivery of Professional and Trade Services and may be used for...'. There is a checkbox labeled 'I accept the terms of use' and 'OK' and 'Cancel' buttons.

Users have to accept the Terms of Use

trustmark.org.uk



## Lodgement Certificate

The certificate includes the following information:

- Address at which work was completed:** For 18 TrustMark, The Square, Bangorville, Midwales, N24 4E8
- Certificate issued by:** TrustMark TM\_007 (Not For Public Use) General PAS2030, Scheme Provider: TrustMark 2020 Limited For Public Use
- Details of Work:**
  - Cavity Wall Insulation (Cavity wall insulation) (0.033) - Date work undertaken: 02/09/2019
  - Work undertaken by: TrustMark TM\_007 (Not For Public Use) 1624513
  - Micro-Generation Solar PV - Date work undertaken: 04/09/2019
  - Applied to rear roof
  - Work undertaken by: TrustMark TM\_004 (Not For Public Use) 1624210

**Details of Work**

**Cavity Wall Insulation Cavity wall insulation (0.033) • Date work undertaken 02/09/2019**  
Insulated extension  
Supa Warm Dri-wool 9000  
Work undertaken by TrustMark TM\_007 (Not For Public Use) 1624513

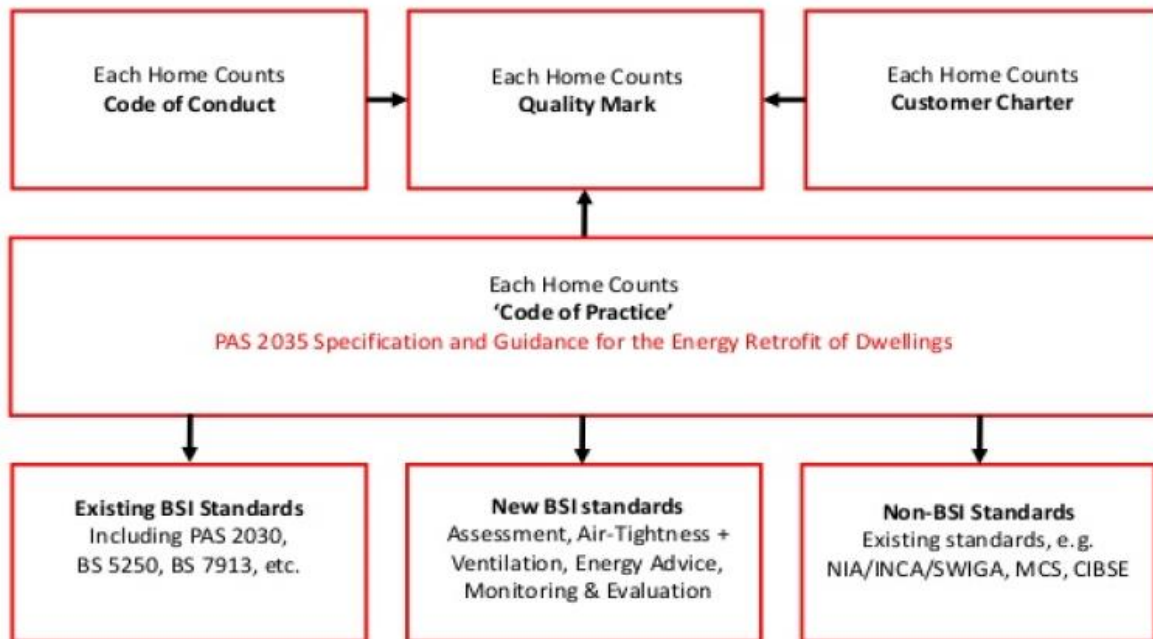
**Micro-Generation Solar PV • Date work undertaken 04/09/2019 •**  
Applied to rear roof  
ElectroGen 3000  
Work undertaken by TrustMark TM\_004 (Not For Public Use) 1624210

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- **Do sub-contractors need to be registered with TrustMark?**  
Only the main contractor needs to be TrustMark registered by 1<sup>st</sup> January 2020
- **How long does it take to become TrustMark registered?**  
It depends on each contractor's current state of readiness. Annex A of the Trustmark Framework Operating Requirements is a great reference. It's better to get registered via a TrustMark registered Scheme Provider as soon as possible to avoid potential delays in case there is a rush of applicants at the last minute
- **Is there list of TrustMark Registered Scheme Providers?**  
A list is available on the TrustMark website  
<https://www.trustmark.org.uk/ourservices/scheme-providers>
- **Will TrustMark Registered Scheme Providers start to contact contractors about the upcoming changes?**  
No, so it's better to be proactive and start the conversations with them
- **Is lodgement into the Data Warehouse carried out before or after install?**  
Under PAS2035 lodgement is carried out at the very end of the install process when all relevant documentation has been uploaded and the Retrofit Co-Ordinator is satisfied. However, the whole process will start before the install when the job is opened
- **Does the Retrofit Co-Ordinator need to wait for authorisation from TrustMark to lodge a measure?**  
No, once the Retrofit Co-Ordinator is satisfied everything is complete the measure can be lodged
- **Can a measure be edited once it's been lodged?**  
No, so it's important for the Retrofit Co-Ordinator to push for high standards from everyone involved in the process. Once lodged, a measure can only be re-opened and re-lodged
- **If a Contractor starts a measure under one PAS version but changes to a new PAS mid-way through, which PAS standards does that install need to be delivered to?**  
The whole process must meet the updated standards at completion, so it's important to plan ahead
- **Will TrustMark check the quality of the documents uploaded to the Data Warehouse?**  
On-going risk-based auditing will take place. This will start in the pilot and be adapted accordingly

- PAS2035 was written for BEIS and TrustMark by BSI and was released in June 2019

## The BSI Retrofit Standards Framework



### Retrofit, what's it all about?

- The requirements and guidance are intended to apply to improvement measures in the context of a holistic approach to retrofit that takes the previous points listed into account
- The holistic approach considers the building as a system of elements, interfaces and occupants that interact, and not, as a set of elements that are independent of each other or of occupant's practices and lifestyle

### The retrofit standards framework PAS2035

This PAS specifies requirements for retrofit of dwellings, including:

- advice at all stages of retrofit
- holistic assessment of dwellings for retrofit;
- identification and evaluation of improvement options (energy efficiency measures, or EEMs)
- design and specification of EEMs (whether individual measures or packages of multiple measures);
- installation of each measure
- and monitoring and evaluation of retrofit project

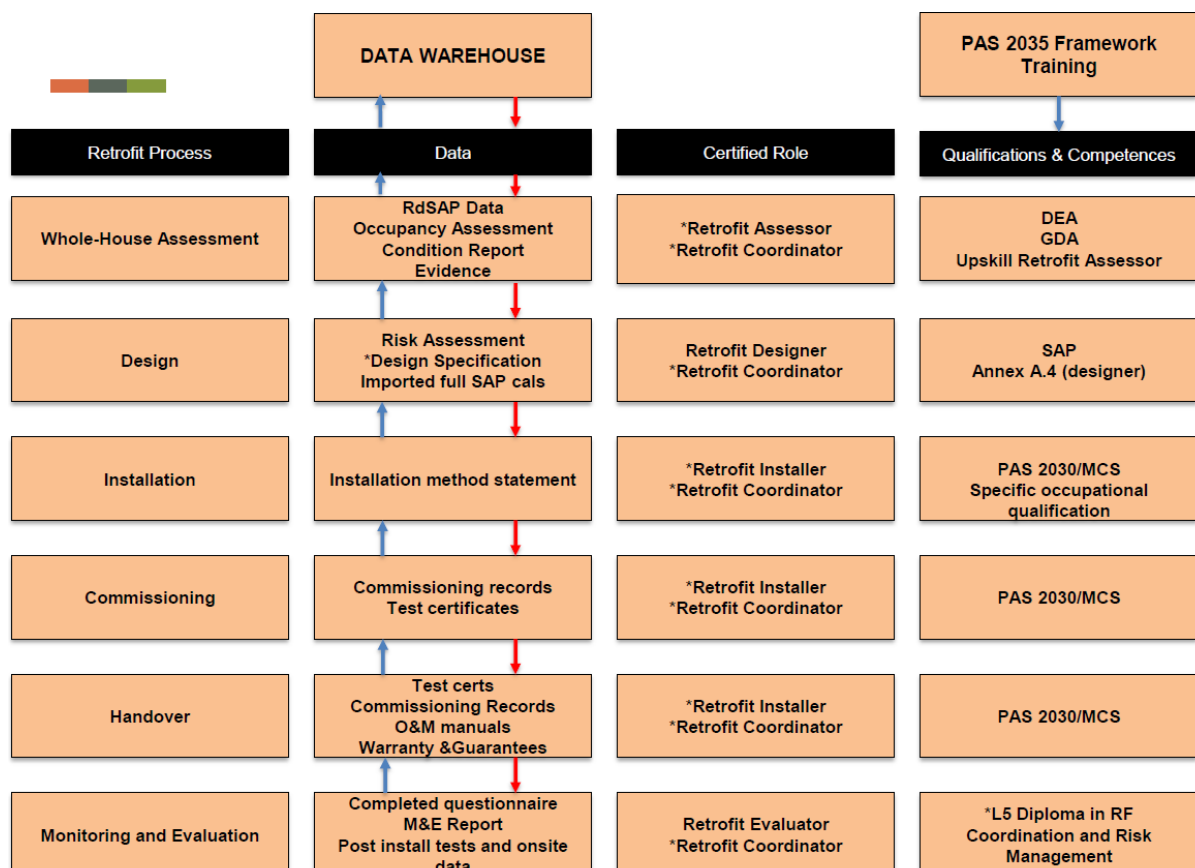
# PAS2035/RETROFIT – ASSESSOR & COORDINATOR CERTIFICATION

PAS2035 covers Energy Efficiency Measures (EEMs) that are intended to;

- improve the insulation of the elements of the building fabric (exposed floors, walls, roofs, windows and external doors) and reduce thermal bridging;
- improve the air-tightness of the building envelope;
- establish a safe dynamic moisture equilibrium through each element of the building fabric;
- improve the resistance of the building envelope to water penetration in order to maintain the thermal properties of the building fabric and the capability of the building envelope to manage moisture in a manner suited to its construction;
- provide or upgrade ventilation to ensure good internal air quality and minimise the risk of condensation;
- minimise the risks associated with vapour or other products, for example volatile organic compounds (VOCs), released within buildings subsequent to their airtightness being improved;
- minimize the risks associated with overheating;
- provide efficient heating and cooling systems that use low or zero carbon (LZC) technologies;
- provide efficient water heating systems with responsive controls, including systems that use LZC technologies;

Many aspects of domestic retrofit are covered by existing standards. Where appropriate, those standards are referred to in PAS2035.

Compliance with the standards referred to is thereby a requirement of this document. It is designed to work in conjunction with PAS2030:2019 for the installation stage of the process.





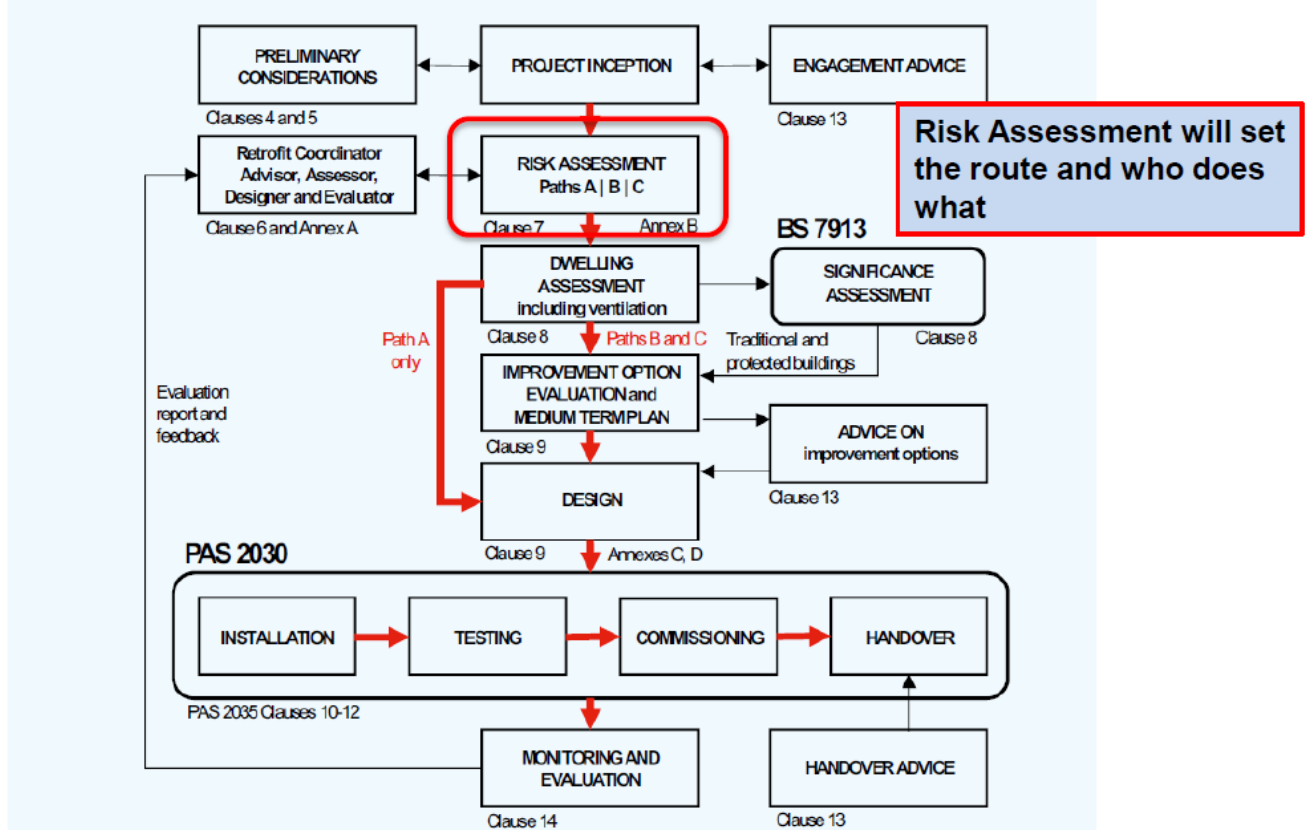
## PAS2035 Timescales

- PAS2035 will initially be used in ECO 3.1
- Consultation – response released Saturday 26<sup>th</sup> November
- Legislation passed through Parliament October 31<sup>st</sup>
- Therefore, an 18-month transition phase will take place from 1<sup>st</sup> January 2020 and ECO work will start to use PAS2035

By June 30<sup>th</sup>, 2021 all ECO measures will be completed using PAS2035

## The PAS2035 Process

**Figure 0.1** – A diagrammatic overview of the domestic retrofit process required by PAS 2035 and PAS 2030



## Summary of each route – who can assess?

- **Path A – Lowest risk properties, projects, measures**  
Can be assessed by the coordinator or a retrofit assessor
- **Path B – Medium risk due to a combination of property and measure risks**  
Can be done by a retrofit assessor
- **Path C – Highest risk buildings, such as listed/protected or high-rise buildings**  
Can be done by a retrofit assessor with extra on-site testing

### Summary of each route – property types

- Stroma anticipates that most properties (90%) will fall into Path B
- There will be a similar split of Path A and Path C
- This will depend very much on differing clients and the projects they focus on

Therefore, it is sensible to address the training need/gap for all paths.

The Retrofit Assessor Role

Overview

Every dwelling that is to be subjected to energy retrofit work must first be assessed by a **Retrofit Assessor**.

Their **main role** is to provide information to the retrofit coordinator about the dwelling. This information will subsequently be used by the Retrofit Designer to determine the best package of measures for the building.

A Retrofit Assessor is a person who has been trained and qualified in accordance with PAS2035.

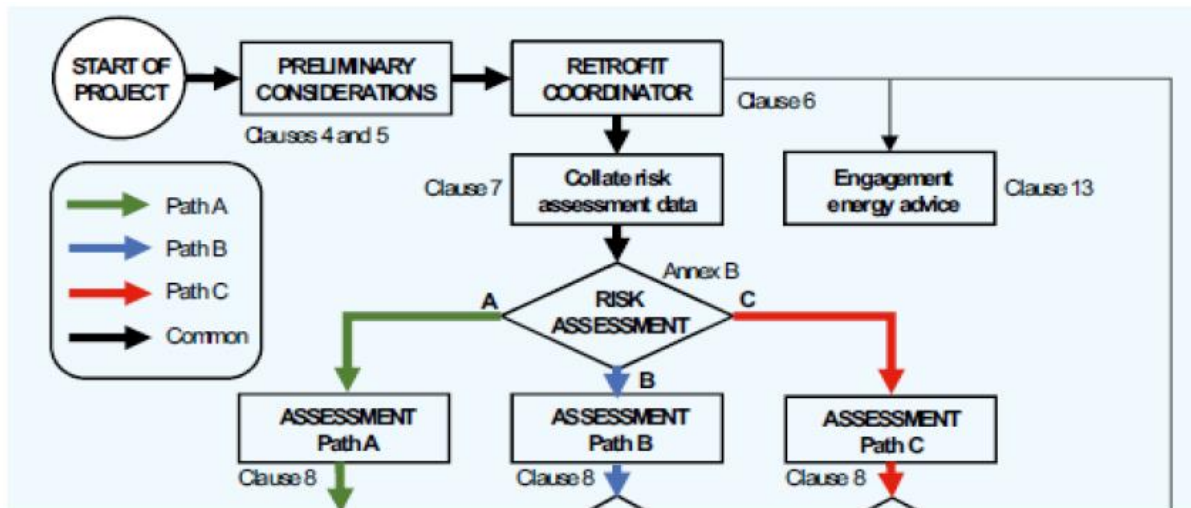
They **must** be certified by a Retrofit Assessor Scheme

What does a Retrofit Assessor do?

The main role of the assessor will be to visit the property and prepare a report in line with the Retrofit Coordinator’s requirements.

The Retrofit Coordinator will issue an instruction to the assessor based on their initial risk assessment under one of the assessment Paths A, B or C.

These assessment paths determine the level and types of information you will be required to gather and include in your report.



Note:

In most cases a standard data set will be gathered by the Retrofit Assessor and uploaded to the Data Warehouse so others can use the data stored there

## What information will I gather?

The retrofit assessment should include the following detail as a minimum requirement;

- An appraisal of the dwelling's heritage
- Identification of the installed building services
- Identification of any constraints imposed by the local planning authority
- Assessment of the significance of the building in accordance with the Guide to the conservation of historic buildings
- Identification of any energy efficiency measures already installed or proposed
- An appraisal of the dwelling's construction
- A measured survey to establish the overall dimensions of the dwelling's heat loss envelope, the dimensions of all building elements and the dimensions of all window and door openings
- Identification of constraints imposed by the site
- Identification of the location and severity of any existing construction defects, structural defects or leaks that relate to the energy efficiency recommendations being made
- An appraisal of occupancy
- An estimate of annual fuel use, fuel costs and carbon dioxide emissions
- An assessment of the existing ventilation arrangements including;
  - Identification of the location and severity of any condensation and/or mould growth in the dwelling;
  - Any intermittent extract ventilation fans or passive stack ventilators and where they are located;
  - Any background ventilators
  - Any other ventilation system and where it is located
  - Whether the identified ventilation systems are functional

Where necessary the Retrofit Assessor may also recommend the commissioning of;

- A test of the air permeability of the building envelope, using an approved method
- A structural engineer's report on the structural condition of the building and its suitability for any proposed improvement measures
- Other relevant in-situ tests (e.g. pull-out tests to establish suitability for proposed fixings)

## Retrofit Assessment

Retrofit Assessors will need to upload relevant data and documents to the **Data Warehouse**. They will upload the required documents and information through Accreditation Scheme portals.

## Data

The following data will be uploaded:

- TrustMark Reference
- Scheme Reference
- UPRN and Address
- Date of Assessment
- Retrofit Assessor details

## RdSAP Results:

- SAP score
- SAP rating (A-G)
- Running costs estimate
- CO2 estimate

## Occupancy Assessment Results:

- Running costs estimate
- CO2 estimate

## Documents

The following documents will be uploaded to the Data Warehouse:

- **Energy Report**  
Provides a SAP score, estimated costs and CO2 emissions, recommendations for improvement and the levels of savings possible
- **RdSAP Inputs**  
The data that was collected and assumed in the production of the energy report
- **OA Inputs**  
Data that has been entered to reflect the occupant lifestyle that impacts upon the energy calculation
- **OA Report**  
Provides a SAP score, estimated costs and CO2 emissions, and recommendations for improvement and the level of savings possible
- **Condition Report**  
The physical state of the dwelling at the time of the assessment related to features that may inhibit the performance of any future energy efficiency measures, typically containing photographs and written description

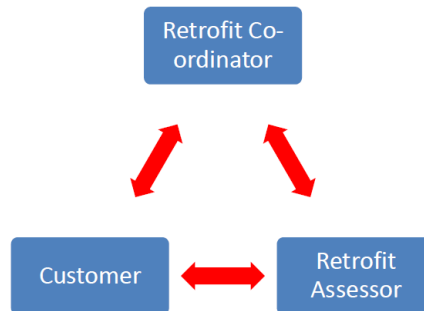
### How Retrofit Assessors fit into PAS 2035

**PAS 2035** Sets out the requirement for everyone involved in the retrofit process from start to finish.

**Retrofit Assessors** sit right in the middle of the process and can in some cases be used at the end of the process.

The **initial** request for work comes from the customer starting the following process.

The coordinator will complete a risk assessment **based on PAS 2035** and assign a suitably qualified retrofit assessor to complete a full assessment based on their risk path.

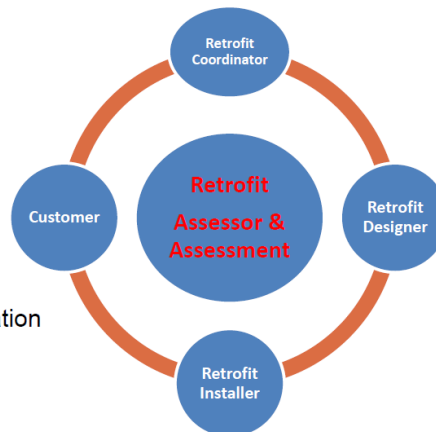


### How Retrofit Assessors fit into PAS 2035

Once the coordinator and customer are happy the design process can begin.

The design process may require further data to complete the design, this extra information might come from a:

- Mechanical engineer
- Structural engineer
- System specialist
- The retrofit assessor

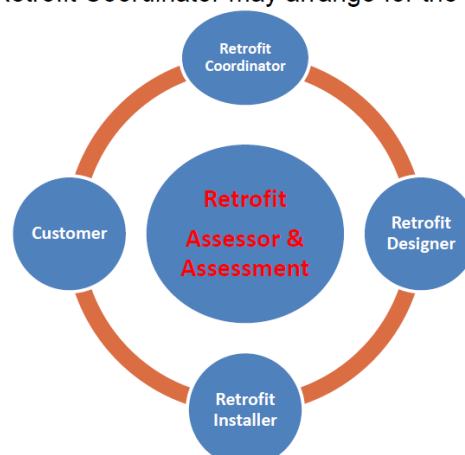


Once the design is complete the installation process can then be completed.

### How retrofit Assessors fit into PAS 2035

After the retrofit work has been handed over, the Retrofit Coordinator may recommend to the Client that a new or updated EPC is prepared for the dwelling(s), and

If the recommendation is accepted the Retrofit Coordinator may arrange for the EPC to be prepared or updated by a Domestic Energy Assessor.



## Retrofit Scheme's and Training

Stroma have been granted by TrustMark to run;

- PAS2035 Retrofit Assessor Scheme
- PAS2035 Retrofit Coordinator Scheme

Competency requirements

- Assessor – DEA **plus** Retrofit Assessor Qualification

## Useful Links

<https://www.trustmark.org.uk/aboutus/useful-links>

<https://www.trustmark.org.uk/ourservices/pas-2035>

<https://www.trustmark.org.uk/ourservices/eco>

<https://www.trustmark.org.uk/ourservices/data-warehouse>

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/842219/eco3-improving-consumer-protection-government-response.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/842219/eco3-improving-consumer-protection-government-response.pdf)

## Useful Documents

- TrustMark Framework Operating Requirements
- TrustMark Code of Conduct
- TrustMark Customer Charter
- PAS2030:2019 - Specification for the installation of energy efficiency measures in existing dwellings and insulation in residential park homes
- PAS2035:2019 – Retrofitting dwellings for improved energy efficiency – Specification and guidance

PAS2035/Retrofit Q&A

- **Can the Retrofit Coordinator be a tradesman?**  
Yes, as long as they are already a qualified DEA/GDA
- **Does a Whole House Assessment need to be carried out even for a single measure? i.e. loft insulation?**  
Yes, a Whole House Assessment would still need to be carried out by a Retrofit Assessor
- **Once a Whole House Assessment is uploaded to the Data Warehouse who is that data available to?**  
The data would only be available to the Retrofit Co-ordinator and whomever they involve in the installation process. Once the measure has been lodged it is the decision of the Homeowner if they wish to make the information available to the public
- **Does the Retrofit Coordinator have to be independent or can it be someone within my company?**  
It can be someone within your company or you can go to someone who is independent. The Retrofit Coordinator could be the same person who does the installation if you wish
- **Will a lodgement fee be charged each time a new measure is installed at a property?**  
One lodgement cost can cover up to 6 measures over a 6-month period
- **If a property has had CWI and Loft measures installed and I want to install a new boiler, do I have to carry out a Whole House Assessment?**  
Yes, it must be done as part of PAS2035 which involves assessment. The extent of which depends on the risk path
- **If I want to do a boiler install, but the property isn't insulated, do I need to do the CWI as well?**  
All measures should be considered, which is the purpose of the Whole House Assessment. However, it makes absolute sense to do the CWI when upgrading the heating.
- **As assessment carried out by a Retrofit Assessor wouldn't pick up a faulty boiler. How would we get boiler measures recommended?**  
A faulty boiler would get picked up and recommended on the design document
- **Does information need submitting to the Data Warehouse at each stage of the install or can it all be done at the end?**  
The Retrofit Coordinator can project manage the process as they see fit