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Government Endorsed Quality



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# TrustMark Registered Retrofit Coordinators Data Warehouse Lodgement Guide

## Purpose

This guidance document has been produced to support understanding of the requirements of a Retrofit Coordinator where direct lodgement to the TrustMark Data Warehouse is required. It is not designed to replace any regulatory, industry obligations or PAS 2035:2019.

It is intended to be used as a guide by a qualified Retrofit Coordinator and in conjunction with PAS 2035:2019 but may support others in their wider understanding of the requirements.

Where the TrustMark compliance process identifies that a lodgement is incomplete or non-compliant it may be rejected without refund of any lodgement fee.

## Introduction

Under the requirements for ECO3 and TrustMark, when Retrofit Installers become certificated to PAS 2030:2019 they must also be compliant with PAS 2035:2019. Every domestic retrofit project compliant with PAS 2035:2019 shall be managed by a Retrofit Coordinator in accordance with PAS 2035:2019.

The following information relates to the practicalities of retrofit projects (including single measures) and TrustMark's expectations of submitted evidence including mandatory required documents. It is intended to be supportive of the process of direct lodgement by a Retrofit Coordinator or via the Coordinators scheme.

The primary reference is **PAS 2035:2019**: which **all** retrofit professionals should have access to.

## General Preliminary Requirements / Key Questions for The Retrofit Coordinator

**[Annex A] Qualification**; the Retrofit Coordinator needs to identify other participants and check their qualifications. The TrustMark registration status of Assessors and Installers can be checked via the TrustMark website: <https://www.trustmark.org.uk/find-a-tradesman> Designers' qualifications if not provided can be checked via their professional body membership where applicable.

- Who has responsibility as required by The Construction Design and Management Regulations?
- Did the Retrofit Coordinator visit site as part of their installer oversight responsibility?
- Did the Retrofit Coordinator review and make the lodgement to the Data Warehouse?

Please note:

- Draft surveys, EPC, assessments, or training material documents are not acceptable for lodgement.
- Photographs must be Geo Tagged where possible.

PAS 2035:19 Clauses and Annexes are referenced in brackets below and are mandatory requirements. The described activities and requirements are sequential.

**[6] Intended Outcomes;** is a comprehensive documented agreement with the client/occupier for any remedial and retrofit works. The outcomes consider the initial condition of the building, its current and future use, protection, and improvement. Was advice sought or given prior to agreeing intended outcomes? **Conflict of Interest;** performing dual or multiple roles of assessor, installer, designer, or coordinator is a potential conflict. Was a conflict of interest declared and how was it managed?

**[7] [Annex B] Risk Assessment;** is a “triage” process to determine the risk pathway using the risk assessment and inherent technical risks criteria tables. The inherent technical risk may be reduced or increased according to the prescribed criteria. TrustMark will only currently recognise industry quality assurance schemes for the reduction of inherent technical risk as operated by CIGA and SWIGA.

**[8] Assessment Report;** captures a whole dwelling assessment (based on the risk assessment pathway above) of its heritage, architectural features, structure, construction, condition, services and previously installed EEM. It must include enough images, plans and detail to determine the property’s suitability for improvement. A BS 7913 Significance Assessment Report is also required for traditional constructions that are not protected. Consider RICS guidance for structural surveys.

**[9] [Annex D] Retrofit Design;** is produced along with the supporting information and specification as detailed within the **Medium-Term Improvement Plan**. It should identify any ventilation and its suitability for the design or if an upgrade is required. Include specific details of products, interfaces (**Measures Interaction Matrix**) and how and the order in which they are to be installed. Include statutory approvals, planning consent etc. If the risk assessment is either pathway B or C, the Retrofit Coordinator should have carried out an **Improvement Option Evaluation** for design consideration. Was additional advice sought or given? Is there a current EPC? Was a toolbox talk given to the installer? Do the designer’s qualifications meet the requirements of PAS 2035 for the proposed design and risk pathway? Have the required qualifications or membership of professional body been included?

**[10] Claim of Compliance PAS 2030;** is the responsibility of and supplied by a qualified and certificated Retrofit Installer. Compliance can be claimed by either.

ECO Declaration of Conformity and Compliant Installation

Declarations as per PAS 2030:17 8.2, 8.3 or Annex G17, PAS 2030:19 9.3.3 or Annex G19

If applicable an MCS Certificate of Conformity.

*Compliance relates to the installation of measures not the installers competence.*

**[12] Handover Documents for Client;** includes legal notifications, Retrofit Coordinator Scheme requirements, certificates of compliance, product and workmanship guarantees, equipment and appliance manufacturers instructions and warranties and any other user information which requires to be explained and supplied to the client/occupier.

**[15] Claim of Compliance PAS 2035;** is currently a self-assessment methodology as per BS EN ISO 14021 and requires a **Permitted Form of Disclosure (15.3)** to claim overall compliance for the retrofit project and all the retrofit participants. *In essence, have the measures been installed as per the agreed or amended design.*

## Additional Requirements

**[14] Monitoring and Evaluation;** has or is there a mechanism to conduct basic monitoring and a customer survey. If the result of that is dissatisfaction with the intended outcomes or there are unintended consequences, is there a process to appoint another Retrofit Coordinator to conduct Intermediate or advanced monitoring?

The Retrofit Coordinator is responsible for claiming conformance to PAS 2035:2019 and uploading the required documentation to the Data Warehouse and submitting the lodgement. Should a Retrofit Coordinator have doubt of the process you are advised to seek guidance from the sources identified via the TrustMark Website and/or use the following links:

	Description
TrustMark Portals	TrustMark Registered Businesses can access the Data Warehouse from within their Business Portal
Data Dictionary	Our Data Dictionary contains details on the information required to lodge data in the Data Warehouse
Data Warehouse Lodgement FAQs	This is where you will find answers to frequently asked questions relating to the Data Warehouse and Lodgement
Inside the Data Warehouse	A document to allow you to become familiar with the process of lodgement
PAS 2035:2019	This is where you can find general information relating to PAS 2035:2019
TrustMark, ECO and PAS Relationships	This is where you can find information to understand more about how TrustMark, ECO and PAS 2030 and PAS 2035 relate to each other
The Framework Operating Requirements - Version 2.0	This is where you can find the Trustmark Framework Operating Requirements and other associated documentation
BSI Shop	Online shop for Standards & PAS documents
Retrofit Academy	THE PAS 2035 Compliance Process Map
PAS 2035	Sections 4 and 5 give guidance about <b>retrofit building physics</b> and a <b>fabric first</b> approach
Retrofit Coordinator Schemes	Technical Resources