



SERVICE BRIEF – LOT C11 Retrofit Assessor and Coordinator

Specific Requirements

The appointed practice shall demonstrate reasonable skill and care as is expected of a person deemed competent to undertake the role.

ICN is committed to Equal Opportunities, and you will be expected to uphold the spirit of this commitment in all your dealings on behalf of each ICN client.

The services which are detailed below are derived from the duties laid on the Retrofit Assessor and Coordinator by the PAS 2035 standard. Reference should be made to the PAS 2035 standard for the precise scope of each service and this schedule must be read within the context of the standard. In general, you are expected to undertake all duties expected of a Retrofit Assessor and Coordinator as described in the PAS 2035 standard.

The Retrofit Assessor and Coordinator will provide all the relevant sections outlined below as a minimum.

Retrofit Assessor

	Description of Services
1.	The ICN supplier shall undertake a programme of providing EPCs for occupied domestic properties, providing a rating of the energy efficiency of the property based upon the characteristics of the property including its age, condition, fabric, structure, insulation and services (heating, ventilation and lighting etc.). Each survey shall include providing recommendations on improving the energy efficiency of the property including cost effective and other improvements to achieve a higher energy rating.
2.	Each Assessor used in conjunction with providing the required services must have; as a minimum, a Level 3 Certificate in Domestic Energy Assessment or equivalent and be accredited with one of the following schemes: <ul style="list-style-type: none"> • ECMK / Elmhurst / Qidos / Sterling / Stroma <p>For properties which fall into Pathway B or C of the PAS2035 standard the minimum qualification requirements are to conform to the requirements of the PAS20235 standard.</p>

3.	<p>The ICN supplier shall ensure that the Assessor carrying out each assessment:</p> <ul style="list-style-type: none"> • Undertakes a physical inspection of the Property • Access all rooms, the boiler and (if access is safe) the loft • Takes photographs of heaters, boilers, meters and any unusual features in the property. • Completes the assessment using the Government's Reduced Data Standard Assessment Procedure (RdSAP) • Enter the data into a government approved software programme or accreditation scheme (ECMK, Elmhurst, Quidos, Sterling or Stroma) • Lodges the EPC generated on the Energy Performance of Buildings Central Register.
4.	<p>The ICN supplier shall ensure that the Assessor also documents the feasibility of measures recommended on the EPC. For example, if the EPC software recommends external wall insulation ("EWI"), but the Assessor recognises that the property has features that renders EWI unsuitable, the Assessor should document any potential measures that may be effective, that do not appear on the EPC.</p>
5.	<p>The ICN supplier shall ensure that the Assessor considers, by non-destructive means, the quality and condition of current measures adopted by the ICN client. This could, for example, include enquiring about the effectiveness of the heating system, or considering the current thickness and extent of loft insulation.</p>
6.	<p>The ICN supplier shall ensure that the Assessor model's recommendations to enable the property to reach SAP69 (Band C).</p>
7.	<p>The ICN supplier shall supply a PDF copy of the EPC to the Client for each assessment undertaken.</p>
8.	<p>No EPCs are to be produced by sampling or cloning methods.</p>
9.	<p>The ICN supplier shall supply all photographs (in a format and medium to be agreed with the ICN client) to support each assessment/survey. The ICN supplier shall itemise and index each photograph in a table with the property address, UPRN and description (e.g. boiler) as a file name.</p>
10.	<p>On a property-by-property basis the ICN supplier must deliver all data derived from each assessment/survey in a format to be agreed with the ICN client for the purposes of uploading the ICN client's Asset Management software / System.</p>
11.	<p>All inspections to conduct the energy assessment shall be by appointment only at a time and date agreed with the customer. The ICN supplier shall operate an appointment making facility, initially contacting the Customers by written branded correspondence, providing a telephone helpdesk for re-arranging appointments, answering queries and following up missed appointments (format to be approved by the ICN Client). The ICN supplier shall, if the ICN client requires, send text messages or emails to customers 24 hours ahead of and on the day of appointments as a reminder.</p>

12.	The ICN client will issue the ICN supplier with orders for either individual properties or batches of void properties. Information on the availability of keys (which are to be collected from an office or staff of the ICN client or from a coded key box) will normally be provided with the order. If it is not provided with the Order, the ICN supplier is to notify the ICN client and seek their instructions.
13.	It is expected that, following receipt of the order by the ICN supplier, the EPC assessment will be undertaken within 5 working days. Following completion of the EPC assessment the ICN supplier will provide the ICN client with a copy of the EPC within 5 working days.

Retrofit Coordinator

	Description of Services
1.	The services comprise carrying out PAS 2035 compliant surveys, designs and specifications for the retrofitting of the ICN clients housing portfolio, to support bids and grant applications for funding and to support the ICN client's business plan for achieving Net Zero Carbon.
2.	The ICN client will already have collected and collated relevant asset management data to feed into the ICN suppliers PAS 2035 compliant risk assessments. The 'intended outcomes' for any future fabric first retrofit of the properties are to: <ul style="list-style-type: none"> • Improve the SAP rating to a C via a fabric-first approach • Achieve a reduction in emissions associated with energy use in line with government targets.
The ICN supplier will be required to:	
3.	Undertake Retrofit Assessments of a representative selection of a property archetype, that positively utilises the 'pattern book' nature of the archetype to achieve efficiencies.
4.	Undertake a measured survey of each property type to provide overall drawn information of the neighbourhood 'pattern book' including plans, elevations and sections. Survey information should be drawn in AutoCAD and provided to the ICN clients in a '.dwg' (2017) editable format.
5.	Produce a 'whole house' plan for each archetype in order to meet the SHDF or similar competition windows. Social Housing Decarbonisation Fund: Wave 2 - GOV.UK (www.gov.uk) . Where required by the ICN client, the ICN supplier shall take a staged approach, with fabric first and ventilation works followed by installation of 'clean heat' technologies later. The lifecycle of different building components will also need to be factored in. For example, double glazed windows might be replaced sometime after external wall insulation is upgraded.
6.	Set out the risks of different retrofit paths, highlight critical interactions and identify risks of possible 'unintended consequences'.

7.	Undertake energy modelling and calculations to test out different options to determine what the most efficient and cost-effective fabric improvement measures are to obtain an EPC of C.
8.	Provide advice on the best modelling approach. The ICN client may have already undertaken initial SAVA Intelligent Energy options modelling.
9.	Undertake an assessment of the property ventilation requirements.
10.	Demonstrate what the overall energy efficiency could be once the 'clean heat' technologies, such as Air Source Heat Pumps (ASHP), are also installed.
11.	Include cost comparisons to assist with options appraisals.
12.	Undertake a 'significance assessment' that can be used to facilitate preapplication discussions with Planning and Building Control departments of local authorities. Some of the archetype properties may be in a Conservation Area or listed.
13.	Identify any additional information needed and associated timelines including where repairs are required prior to retrofit works being commenced.
14.	Develop the technical designs and specifications to RIBA Stage 4, ready to be used as part of the procurement documentation to appoint a PAS 2030 Contractor and to support a Building Regulation submission.
15.	Ensure that the retrofit measures are safe, high-quality, durable and fit for purpose, recognising that the properties are part of a client's asset or portfolio and need to be durable and easy to maintain.

This appointment is being executed as a deed. Documentation and guidance relating to matters arising from the Building Contract may be sought for the full term of the deed.