



TRUSTMARK
Government Endorsed Quality

Update

Site Visit Requirements for Retrofit Coordinators and Qualified Professionals



Overview

The following requirements ensure that Retrofit Coordinators (RC) and qualified professionals maintain oversight of energy efficiency installations, especially in high-risk scenarios, while allowing flexibility in evidence collection.

This document details the responsibilities and requirements for an RC and other qualified professionals during site visits for works undertaken in accordance with PAS 2035:2023.

High-risk measure includes External Wall Insulation (EWI), Internal Wall Insulation (IWI), Room-in-Roof Insulation (RIRI), Underfloor Insulation (UFI), Park Home Insulation (PHI), and Flat Roof Insulation (FRI).

1 Risk-Based Approach for Measures

- A risk-based approach will be applied by the RC while coordinating a project. Site visits must be undertaken by the RC if it is deemed necessary for the project to be coordinated in compliance with PAS 2035:2023.
- A site visit is mandatory for all PAS 2035:2023 projects where EWI, IWI, RIRI, UFI, PHI, or FRI are installed.

2 Qualifications for Site Visits

- Site visits must be completed by a qualified, TrustMark registered, and active Retrofit Coordinator (RC) or a suitably qualified designer.
- Qualified designers should be registered with TrustMark or possess relevant professional qualifications such as:
 - RICS surveyor
 - MCIOB (Member of Chartered Institute of Building)
 - Architect registered with ARB (Architects Registration Board)

These professionals must meet the PAS 2035:2023 Annex A3 designer requirements for competence.

- Digital evidence and records as required under section 9 of PAS 2035:2023 (photographs or videos) documenting the progress and quality of the installation must be recorded as part of the site visit. The required set of evidence shall include as a minimum:
 - Images specific to the measure installed in accordance with the relevant PAS 2030 annex or MCS standard to include relevant building details, services, structural integrity, fixings and material/equipment as specified in the design either under construction or in situ
 - Ventilation in situ at the time of the visit
 - Design interface detail for multiple measures
 - Any significant building detail, areas of concern and non-conformance with the specified design

3 Responsibility for All Other Measures

- The RC is responsible for gathering appropriate evidence of site visits for all other measures. This can be done through:
 - Physical onsite visits by a qualified individual as per PAS 2035:2023 requirements.
 - Gathering digital evidence (photographs or videos) documenting the progress and quality of the installation. The required set of evidence is defined in section 2 above.

4 Digital Evidence Limitation

- The option to use digital evidence will be removed if a Non-Conformance (NC) is identified during an audit where data is found to be:
 - Missing
 - Insufficient or incomplete
 - Gathered by an individual whose competence does not meet PAS 2035:2023 requirements
 - Unsuitable for its intended purpose
- Collected by a person undertaking the evidence collection who has a non-disclosed conflict of interest with the RC.
- In such cases, the process will revert to the RC requiring physical onsite inspections for all projects moving forward, at the discretion and agreement of all Accreditation Schemes with which the RC is registered. In addition, the TrustMark risk-based audit frequency will be increased.
- Under its PAS 2035 obligations, TrustMark will make all final decisions regarding an RC's ability to use the digital evidence facility.

5 Lodgement Confirmation

- The Retrofit Coordinator must confirm that sufficient evidence has been collected to fulfil the PAS site inspection requirements before lodging or officially registering the project.



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