

**RISE**

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# The role of the retrofit coordinator in post retrofit completion

Supply Chain Advice Pack

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# Overview

Completing retrofit improvement works on site is a major milestone in itself. However, it is critical that due regard and sufficient resource are applied post-completion to ensure and validate project successes. Monitoring and evaluation is also essential for compliance with PAS 2035.

Post-completion monitoring and evaluation, whilst being a foundation stone under PAS 2035 and a key recommendation of the Bonfield Each Home Counts review 2015,<sup>1</sup> continues to be increasingly important with monitoring for government funded schemes.



Source: RICS<sup>2</sup>

One method is SMETER technologies, which take direct measurements from a building to assess its performance. SMETERs would calculate the average rate at which the home loses heat – measured as the Heat Transfer Coefficient (HTC). Measuring improvements in this way and rewarding industry parties accordingly is expected to drive higher-quality measures and encourage adherence to high standards. Presently, various systems exist at affordable pricing to measure temperature, humidity and CO<sub>2</sub> pre and post retrofit improvements.

Post-completion activities for PAS 2035 involve project collation, TrustMark lodgement, reporting, and monitoring/ evaluation, as well as handover advice.

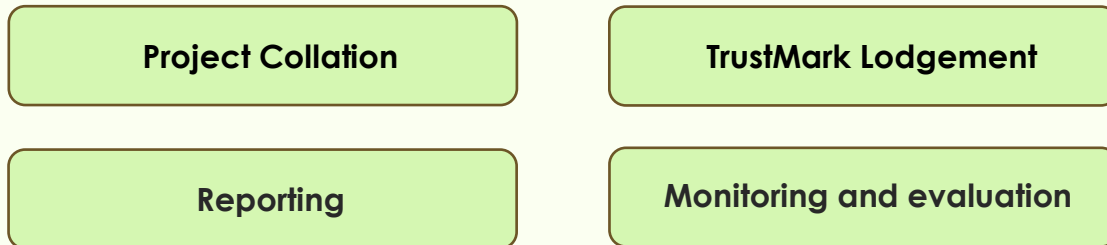
The Retrofit Coordinator makes a lodgement with TrustMark on its Data Warehouse, validating the work and providing a long-term guarantee. Retrofit Evaluators conduct post-installation monitoring and evaluation. A PAS 2035 Retrofit Evaluator is an individual who monitors and assesses the effectiveness of a retrofit project, providing feedback to the client and project team. To become a qualified Retrofit Evaluator, you'll typically need a Level 3 Domestic Energy Assessor (DEA) qualification as a foundational step. Beyond that, you can pursue further qualifications like a Level 4 Retrofit Assessor or a Level 5 Retrofit Coordinator, which are often advanced certifications for those already working in the field. They ensure the project's goals are being met, identify any performance gaps, and

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<sup>1</sup> [Each Home Counts Report](#)

<sup>2</sup> [RICS Built Environment Journal – Retrofitting UK Homes](#)

suggest improvements. While a Retrofit Coordinator can also fulfil this role for Basic Evaluation, it's often considered best practice for a separate person to act as the Evaluator to ensure objective performance evaluation. For Intermediate and Advanced Evaluation, it is recommended a separate individual undertakes the role.



### **Project Collation**

All project documentation and data are gathered and organised, this will often be undertaken by a Retrofit Administrator utilising a PAS 2035 tracker or proprietary software platforms. This ensures the project is well-documented, compliant with standards, and accessible to all stakeholders, especially the Client or Landlord for ongoing management and maintenance.

### **TrustMark Lodgement**

The Retrofit Coordinator lodges the project and implemented measures in TrustMark's Data Warehouse. This process ideally begins as early as possible in the programme to prevent a bottleneck of documentation requirements at the end of the programme. Lodgement includes any associated guarantees and user manuals. TrustMark provides assurance of the high level of technical skill involved, expertise of installation, and long-term quality assurance guarantees.

### **Reporting**

Reporting of grant-funded PAS 2035 projects to the Department for Energy Security and Net Zero (DESNZ) is crucial. Reporting helps to ensure that the project meets the standards and requirements and can assist in wider industry learning, including lessons learned, and continuous performance improvement. It is recommended that, during set up, project filing structures take account of any known reporting requirements wherever possible.

### **Monitoring and Evaluation**

A Retrofit Evaluator conducts post-installation monitoring and evaluation. According to PAS 2035, the purpose of monitoring and evaluation is to:

*"a) determine whether the intended outcomes (as detailed in 6.2 ['Establishing Intended Outcomes']) have been realised; and*

*b) identify and learn from any project-specific or systematic problems with the retrofit risk assessment, the dwelling assessment, the retrofit design, the installation of EEMs or the testing, commissioning or handover of EEMs." [PAS 2035, clause 13.1].*

Monitoring and evaluation validates 'as built' design including energy use savings achieved, thermal comfort, indoor air quality and assesses occupant feedback. It is important mechanical and electrical installations are monitored over a heating season. Evaluation follows a triage process outlined below.

### **Basic Monitoring**

- A questionnaire to the resident, undertaken up to three months after works completion. It is important to understand if residents living/ heating patterns have changed and any impact that may have on energy consumption and energy bills.

### **Intermediate Monitoring**

- A level of monitoring and evaluation that is used when a retrofit project has not met its intended outcomes or has unintended consequences, including site visits, air tightness tests, fuel usage monitoring, and occupant interviews, undertaken 6-12 months after works completion.

### **Advanced Monitoring**

- Goes beyond basic performance tracking and includes elements like understanding occupant feedback, evaluating the impact of renewable energy installations, and using methodologies like Most Significant Change\* to capture project impacts, undertaken up to two years after works completion.

*\* The Most Significant Change (MSC) technique is a monitoring and evaluation method that focuses on collecting stories of significant changes experienced by individuals or groups as a result of a program or intervention.*

The decision on whether further monitoring is needed may be prompted by the Client, the Retrofit Coordinator or the Retrofit Evaluator and should follow a formal meeting that is scheduled before handover of properties is taken.

Where it has been determined that further monitoring and evaluation is required (13.3.1), the Retrofit Evaluator shall design a further monitoring and evaluation plan (if one does not exist already) with a defined duration, in accordance with BS 40101 for Preliminary Evaluation, Light Building Performance Evaluation (BPE), or Standard BPE (including Investigative BPE elements).<sup>\*2</sup>

*\*2 Building Performance Evaluation is a way of using different monitoring techniques to evaluate a building's energy efficiency performance.*

Not all clients and occupants might complete and return the basic evaluation questionnaire. The Retrofit Evaluator's report can only cover dwellings for which questionnaires have been completed and returned. Dwellings for which completed questionnaires are not returned should be excluded from the analysis and noted in the report.

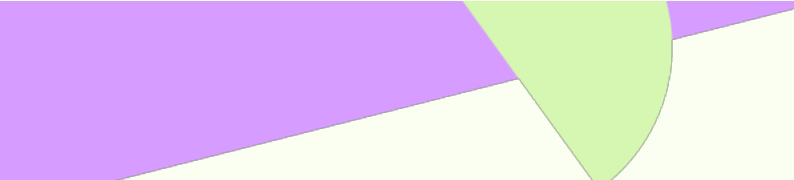
## **PAS2035:2023 – The Key Changes**

PAS 2035:2023 places greater emphasis on in-depth building condition reports, airtightness testing, and occupant behaviour assessments. PAS 2035:2023 makes Medium Term Plans (MTIPs) a mandatory requirement. There are strengthened Monitoring and Evaluation requirements with the new standard referencing BS 40101 for Building Performance Evaluation, emphasising a continuous approach to monitoring and evaluating energy performance from project initiation through to post-completion.

PAS 2035 stage	Relevant clauses (2023)	Main activities and intent
Retrofit advice	3.26 5.7 12.1	Ensure appropriate, suitable, and customised retrofit advice is given to occupants using specified guidance, at the time or shortly after handover.
Monitoring and evaluation	13.1 – 14.5	Ensure that every retrofit project is subject to monitoring and evaluation following the triage process to confirm outcomes and identify and resolve problems, collating, summarising and reporting monitoring data in the allotted timescales.
Claims of compliance	14.1 – 14.3	Collate and present evidence of compliance with PAS 2035 by any of the three available methods and in accordance with EN ISO 14021.
Qualifications	A.6 Note Annex A	Where one person fills more than one retrofit role, report any conflict of interest to the client and manage it appropriately.

## Summary

Post-completion activities in PAS 2035 involve a variety of tasks to ensure the retrofit project's success and long-term performance. These include project collation, TrustMark lodgement, DESNZ reporting, monitoring and evaluation, and handover



advice. The Retrofit Coordinator plays a crucial role in this phase, validating energy savings, assessing occupant feedback, and resolving any follow-up issues.

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