

Public Consultation Paper

Integrated Energy Efficiency Retrofit Accreditation Scheme

Accrediting the individuals that oversee and co-ordinate
Integrated Energy Efficiency Retrofits of commercial buildings

Prepared by the Energy Efficiency Council
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Foreword

This paper sets out the proposed model for an accreditation scheme for the individuals that oversee and co-ordinate Integrated Energy Efficiency Retrofits (IEERs) of commercial buildings.

Two previous papers set out the rationale for the scheme¹ and the broad framework for its operation.² This paper provides detailed information on how the scheme will operate, who will be accredited and the method of assessment.

It has been released to canvass views on the proposed model from industry, customers, government and other stakeholders. This feedback will play an important role in finalising the scheme design prior to its launch in mid 2013.

Update on company accreditation

Previous papers canvassed the option of creating an accreditation scheme for energy service companies alongside the individual accreditation. After further design work and consultation, this approach has been revised. The Energy Efficiency Council (EEC) is now planning to launch a directory of companies focused on providing information on companies to energy efficiency customers. Consideration of a full accreditation scheme has been deferred to 2014.

A model for the proposed Company Directory will be circulated for comment in the second half of 2013.

Terminology

The terminology used in this paper - including the names for the levels of accreditation and the name of the scheme itself - is provisional. These names will be finalised prior to the scheme's launch.

Acknowledgements

Sincere thanks to the members of the Steering Committee, the Technical Reference Group and others for their generous contribution of time and expertise to this important project.

¹ Energy Efficiency Council 2011, *Energy Efficiency in Commercial Building, Accreditation and Skills Scoping Report*, Sustainability Victoria, Melbourne. Available at bit.ly/147IGPv

² Energy Efficiency Council 2012, *Proposed Energy Efficiency Accreditation Scheme for Retrofit Service Providers*, Sustainability Victoria, Melbourne. Available at bit.ly/10ILawf

How to provide feedback

The EEC welcomes feedback on the scheme design proposed in this paper. Chapters 3 and 4 conclude with key questions for stakeholders, however you are welcome to comment on any aspect of the scheme.

There are three primary ways to provide feedback - attend an information session, contact the EEC's accreditation project manager, or make a formal submission.

Attend an information session

The Energy Efficiency Council will be hosting information sessions on the scheme in Sydney, Brisbane and Melbourne. These sessions will be an opportunity to hear presentations on the scheme, ask questions and provide feedback on the proposed design.

Information sessions will be held on the following dates:

Sydney - Monday 22nd April, 2PM-4PM
Brisbane - Tuesday 23rd April, 2PM-4PM
Melbourne - Wednesday 24th April, 10AM-12PM

For venue details please RSVP events@eec.org.au and indicate which forum you wish to attend.

Contact the accreditation project manager

If you have any questions or comments on the scheme, please contact the accreditation project manager at the Energy Efficiency Council, Luke Menzel.

Luke Menzel
Manager, Sector Development
Phone: 03 8327 8421
Email: luke.menzel@eec.org.au

Make a formal submission

Submissions may address the questions at the end of Chapters 3 or 4, or any other aspect of the scheme. Submissions should be sent as Word or PDF documents to luke.menzel@eec.org.au with the subject line 'Accreditation Submission'

The closing date for formal submissions is 5PM on Friday 3rd May, 2013.

The Steering Committee

This consultation paper has been prepared by a Project Team based within the Energy Efficiency Council (EEC), under the supervision of an independent Steering Committee appointed by the EEC Board.

The EEC Board has given the Steering Committee full autonomy to:

- Finalise the detailed scope, vision and objectives of the scheme;
- Approve the design and consultation process;
- Sign off the interim scheme design to be released for public consultation (this paper);
- Sign off the final design that will be presented to the EEC Board for implementation;
- Provide oversight of the assessment and complaints process.

These tasks have been delegated to an independent Steering Committee to ensure that the final scheme design meets the needs of governments, industry, customers and the broader sector.

About the Steering Committee

Steering Committee members have been appointed due to the breadth and depth of the expertise they bring to this project. They are acting as individuals, not as representatives of their organisations. Therefore their participation in the Steering Committee, or their decision to sign off on the scheme design, should not be construed as an endorsement of the scheme by that individual's employer.

The Steering Committee is made up of the following members:

Name	Organisation
Simon Kelley (chair)	AGL Energy Ltd
Matthew Clark (co-chair)	Office of Environment and Heritage, NSW
Sam Burke	Department of Treasury and Finance, Victoria
Cherie Gregoire	Department of Energy and Water Supply, Queensland
Val MacGregor	Sustainability Victoria
Cath Bremner	ANZ
Bruce Precious	GPT (on behalf of the Property Council of Australia)
Bryon Price	A.G. Coombs Group
Ben Samways	Ecosave
Geoff Andrews	Genesis Now
Randy Gadiant	Siemens
Owen Pidgeon (observer)	Department of Finance and Deregulation, Federal Government

1 Executive summary

1.1 Introduction

The opportunity to initiate a step change in the efficiency of Australia's commercial buildings has never been greater. A range of drivers, not least rapidly rising energy prices, have pushed energy efficiency to the front of the agenda for business. Over the last several years there has been heavy investment in the efficiency of Australia's Premium and A Grade office buildings, and governments have begun to act to upgrade their own buildings. However the energy efficiency opportunity is not being fully realised in the commercial building sector, despite strong drivers.

What are Integrated Energy Efficiency Retrofits?

IEERs are energy efficiency retrofits of commercial buildings that:

- include all stages of an energy efficiency retrofit, from scoping to verification of energy savings
- consider all major energy uses within the building
- take a comprehensive approach to design, incorporating multiple technologies when appropriate
- take an integrated approach to implementation, avoiding unnecessary disruption of the building's occupants and systems.

For the formal definition of IEERs, see Section 4.4.

One of the most significant barriers to realising the energy efficiency opportunity is the difficulty identifying energy efficiency implementation professionals with the knowledge and capabilities to oversee, co-ordinate and implement Integrated Energy Efficiency Retrofits (IEERs).

There are great benefits when IEER projects are overseen and co-ordinated by a professional with a good understanding of all stages of the retrofit process, as this individual can ensure that the agreed energy efficiency objectives are driven through every stage of project delivery. Having someone in this role results in more focused and integrated projects, and delivers better energy efficiency outcomes for customers.

However ensuring that IEERs are led by people with the right skill set is not always straightforward. As the drivers for energy efficiency continue to grow, commercial building owners and managers with little or no experience with energy efficiency retrofits will begin seeking IEERs in increasing

numbers. These building owners and managers often have limited time and resources, and find it difficult to determine if retrofit providers have the skills required to lead a project.

As a result, retrofit providers need a way of demonstrating to customers that their staff have the knowledge and capability to lead an IEER. More broadly, retrofit providers also need to find and develop new employees that can fill this specialised role, to ensure that the sector can meet demand and grow sustainably over time.

Accreditation can play an important role in addressing these issues.

1.2 The IEER Accreditation Scheme

In response to these issues, the Energy Efficiency Council (EEC) is proposing the IEER Accreditation Scheme. The IEER Accreditation Scheme will recognise the individuals that have developed the knowledge and capabilities that allow them to oversee and co-ordinate an entire IEER project, and provide a pathway for individuals wishing to gain these skills over time.

The scheme does not seek to accredit other roles in the retrofit industry, or affect other delivery models for commercial building retrofits. Rather, the scheme intends to complement other standards and accreditations that are already in place.

1.3 Types of accreditation

The scheme will offer one entry level registration and two levels of accreditation:

- Affiliate registration
- Associate accreditation
- Certified Energy Efficiency Professional (CEEP) accreditation.

Affiliate is an entry level registration available to anyone that has the minimum qualifications or experience, and wishes to specialise in IEER projects. Individuals registering as an Affiliate are indicating their intention to progress to the higher levels of accreditation.

Associate accreditation is available to energy efficiency implementation professionals that have worked as part of a project team delivering commercial building retrofits. Associates have the knowledge and capability to oversee and co-ordinate simple IEER projects in their entirety.

Certified Energy Efficiency Professional (CEEP) accreditation is available to experienced energy efficiency implementation professionals. CEEPs have the knowledge, capability and practical experience necessary to oversee and co-ordinate complex IEER projects in their entirety.

Both Associates and CEEPs will be accredited to lead IEER projects. However the scheme's guidelines will recommend that Associates lead simple IEER projects, and that complex projects are lead by CEEPs.

Level	Description
Affiliate registration	An entry level registration. For individuals that wish to progress to Associate or CEEP accreditation.
Associate accreditation	An intermediate accreditation. For individuals with the knowledge and capabilities necessary to oversee and co-ordinate simple IEER projects in their entirety.
CEEP accreditation	An accreditation for experienced professionals with the knowledge, capabilities and practical experience necessary to oversee and co-ordinate complex IEER projects in their entirety.

Table 1.1: Overview of registrations and accreditations.

Accreditation will have substantial benefits for professionals, retrofit providers, customers and education institutions (Table 1.2).

Group	Benefits of accreditation
Energy efficiency sector as a whole	Support capacity for consistent outcomes focused implementation of IEER projects, raising the quality of projects delivered
	Improved project outcomes, increased customer confidence, and growth in the market for energy efficiency projects
	Higher profile for a critical leadership role in project implementation, attracting talented individuals to the sector
Experienced energy efficiency professionals (already overseeing and co-ordinating IEERs)	Independent recognition of knowledge and capability can be demonstrated to energy efficiency customers
	Identification as an industry leader in the delivery of IEER projects.
	Membership of a community of peers that actively contribute to improving practices across the industry.
Aspiring energy efficiency professionals (graduates and people entering the industry from other sectors)	A clear pathway to becoming an experienced professional.
	Different levels of registration and accreditation provide stepping stones that recognise progress in knowledge and capability.
	Membership of a community of experienced professionals that can provide advice and support.
Companies currently providing IEERs	Ability to use accreditation as the foundation for internal training and mentoring programs.
	Staff development efforts recognised by an independent third party.
	Opportunity to promote accredited staff to potential customers.
Companies entering the sector	Access to a clear framework and pathway for increasing staff capacity.
	Staff development efforts recognised by an independent third party.
	Opportunity to promote accredited staff to potential customers.
Customers seeking an IEER provider	Ability to easily determine whether providers have staff with the knowledge and capability necessary to oversee and coordinate IEER projects.
	Ability to complain to an independent panel if accredited professionals breach the scheme's Code of Conduct.
	Better project outcomes resulting from improved industry standards and accountability.
Education providers training current and future IEER leaders	Use the scheme to adapt current education offerings to better meet industry needs.
	Develop new, targeted training programs that support the development of industry professionals.

Table 1.2 Benefits of accreditation

1.4 How Candidates for accreditation will be assessed

A range of factors will be taken into account when assessing Candidates for Associate or CEEP:

- Qualifications;
- Experience delivering and / or leading energy efficiency retrofits of commercial buildings;
- Knowledge and capabilities in ten primary areas (Associates and CEEPs) and five secondary areas (CEEPs only).

To be accredited, Candidates will be required to submit a written application addressing each of the relevant knowledge and capability areas (Table 1.3), supply project documentation and attend an interview with an independent assessor.

Primary knowledge and capability areas (for both Associate and CEEP Candidates)	
1	Project management
2	Audits and measures
3	Procurement pathways
4	Whole of system and services thinking
5	Business case development
6	Energy consumption
7	Energy efficiency technology
8	Measurement and verification
9	Risk management
10	Stakeholder engagement
Secondary knowledge and capability areas (for CEEP Candidates only)	
11	Project parameters and context
12	Project justification
13	Performance management
14	Ongoing maintenance
15	Behaviour change

Table 1.3: Knowledge and capability areas for Associate and CEEP Candidates.

1.5 Summary of requirements for registration and accreditation

A summary of the requirements for registration and accreditation is provided in Table 1.4. For more details on each of these requirements, see Chapter 3.

Level	Description	Minimum experience implementing commercial building energy efficiency retrofits		Additional experience requirements	Application process	Documents for submission with application	Duration
Affiliate registration	Entry level registration indicating intention to progress to the higher levels of accreditation.	None (with degree in engineering, architecture, surveying, construction management or project management; a mechanical or electrical trade qualification), OR →	One year (with no relevant qualification)	None	<ul style="list-style-type: none"> • Written application 	<ul style="list-style-type: none"> • Proof of qualifications 	Two years
Associate accreditation	Intermediate accreditation for people that can oversee and co-ordinate simple IEER projects in their entirety.	One year (with degree in engineering, architecture, surveying, construction management or project management; a mechanical or electrical trade qualification), OR →	Three years (with no relevant qualification)	None	<ul style="list-style-type: none"> • Written application including short answer questions • Interview 	<ul style="list-style-type: none"> • Proof of qualifications • One project management plan from a project the Associate Candidate has worked on. 	Three years
CEEP accreditation	Accreditation for experienced professionals that can oversee and co-ordinate complex IEER projects in their entirety.	Three years (with degree in engineering, architecture, surveying, construction management or project management; a mechanical or electrical trade qualification), OR →	Five years (with no relevant qualification)	CEEP Candidates must have either: <ul style="list-style-type: none"> • Led three IEER projects in their entirety, OR • Be able to demonstrate that they have an equivalent amount of experience leading IEERs across a range of retrofit projects, and have experience leading each discrete stage of an IEER project. 	<ul style="list-style-type: none"> • Written application including short answer questions • Interview 	<ul style="list-style-type: none"> • Proof of qualifications • Three project management plans from projects the CEEP Candidate has worked on. • A cost benefit analysis of competing Energy Conservation Measures and a measures prioritisation evaluation. • A measurement and verification plan. 	Three years

Table 1.4: Summary of requirements for registration and accreditation. For more details see Chapter 3.

1.6 Application and renewal fees

The application fee charged to Candidates, and the renewal fee charged to Affiliates, Associates and CEEPs, are yet to be determined. Minimising the cost of registration and accreditation for industry participants will be a key consideration when fees are set. High costs, either in terms of administration time or fees, will act as a disincentive to become accredited.

Cost is also relevant for the scheme administrator. In order to be self-sustaining, accreditation fees or other forms of revenue must be sufficient to cover implementation and running costs.

The EEC is currently seeking support from partners for the costs associated with establishing the scheme. Fees for the first round of registrations and accreditations will be announced shortly.

1.7 Maintaining accreditation

To maintain accreditation, it is proposed that Associates and CEEPs be required to:

- Adhere to the scheme Code of Conduct and terms and conditions;
- Submit a Continuing Professional Development Log every twelve months;
- Demonstrate they are continuing to work in the industry. This may be done by submitting three IEER case studies in each three year accreditation period.

1.8 Scheme governance

The scheme will be administered by the EEC, however there will be no requirement to join the EEC to become accredited.

To ensure impartiality, transparency and independent oversight, the Board will appoint two independent groups that will have a central role in the administration of the scheme:

- A Steering Committee comprised of representatives from industry, government, customers and other experts. This Committee will oversee the activities of the EEC staff that administer the scheme, and the Assessment Panel;
- An Assessment Panel comprised of industry experts. Members of this Panel will be responsible for assessing applications.

Complaints will be reviewed by the 'Complaints Subcommittee' of the Steering Committee. All complaints processes will follow the principles of procedural fairness.

For more details on scheme governance, see Chapter 4.

1.9 What to read next

Chapter 2 describes the rationale, structure and benefits of the scheme.

Chapter 3 provides detailed information on the requirements for registration and accreditation.

Chapter 4 gives an overview of the proposed governance and administrative arrangements for the scheme.

Appendix A contains information on the background of this project and the design process for the scheme.

2 The rationale, structure and benefits of accreditation

2.1 Introduction

This chapter details the rationale, structure and benefits the proposed accreditation program. It describes the energy efficiency opportunity in the commercial building sector, and identifies a key barrier to realising this opportunity - the difficulty identifying energy efficiency professionals with the skills necessary to lead Integrated Energy Efficiency Retrofits (IEERs) (Sections 2.2 and 2.3). It then describes the structure and scope of the proposed accreditation scheme, which directly addresses this barrier (Section 2.4 and 2.5). It closes by setting out the benefits of accreditation for professionals, companies, customers and education providers (Sections 2.6 to 2.8).

2.2 The energy efficiency opportunity

The opportunity to initiate a step change in the efficiency of Australia's commercial buildings has never been greater.

Rapidly rising energy costs are making energy efficiency a higher priority for many businesses. The substantial dividends that flow from retrofitting commercial buildings are clear; ClimateWorks Australia has found that the commercial property sector has the opportunity to lock in energy savings of 37 per cent against business as usual by 2020.³

An increasing number of building owners and managers understand that energy efficiency retrofits can deliver a substantial return on investment. Over the last several years there has been heavy investment in the efficiency of Australia's Premium and A Grade office buildings. Governments too are moving to increase the energy efficiency of their building stock, with flagship initiatives such as Victoria's Greener Government Buildings Program demonstrating that comprehensive government action has tangible benefits for the budget bottom line.

2.3 A critical barrier

Despite these drivers, the energy efficiency opportunity is not being fully realised in the commercial building sector.

There are a number of barriers inhibiting the growth of activity in the retrofit sector. Information gaps, scarcity of financing, energy market rules and the divergent interests of landlords and tenants are all factors, and have been the focus of significant attention from industry and government. However one of the most significant obstacles remains unaddressed. This barrier is centred around difficulties identifying, sourcing and training energy efficiency implementation professionals with the knowledge and capabilities to oversee, co-ordinate and implement Integrated Energy Efficiency Retrofits (IEERs).

IEERs are energy efficiency retrofits of commercial buildings that:

- include all stages of an energy efficiency retrofit, from scoping to verification of energy savings;
- consider all major energy uses within the building;
- take a comprehensive approach to design, incorporating multiple technologies when appropriate;
- take an integrated approach to implementation, avoiding unnecessary disruption of the building's occupants and systems.⁴

Importantly, IEERs deliver a total building retrofit, integrating a range of technologies to deliver substantial energy savings. However IEERs are often complex, and require managing the services of a number of technical specialists over the course of a project.

³ Climateworks Australia 2010, *Australian Carbon Trust Report: Commercial buildings emissions reduction opportunities*, ClimateWorks Australia, Melbourne.

⁴ Some companies that deliver IEERs also provide guarantees to the customer regarding the energy that will be saved after the project is completed. Energy Performance Contracts (EPCs) are one form of guarantee, but other guarantee mechanisms are also used.

This complexity means that there are great benefits when IEER projects are overseen and co-ordinated by a professional with a good understanding of all stages of the retrofit process, as this individual can ensure that the agreed energy efficiency objectives are driven through every stage of project delivery. Having someone in this role results in more focused and integrated projects, and delivers better energy efficiency outcomes for customers.

However ensuring that IEERs are led by people with the right skill set is not always straightforward. As the drivers for energy efficiency continue to grow, commercial building owners and managers with little or no experience with energy efficiency retrofits will begin seeking IEERs in increasing numbers. These building owners and managers often have limited time and resources, and find it difficult to determine if retrofit providers have the skills required to lead a project.⁵

As a result, retrofit providers need a way of demonstrating to customers that their staff have the knowledge and capability to lead an IEER. More broadly, retrofit providers also need to find and develop new employees that can fill this specialised role, to ensure that the sector can meet demand and grow sustainably over time.

The lack of accreditation for this role gives rise to a number of issues:

- Customers have no independent verification that a project leader put forward by an energy efficiency provider has the skills necessary to lead an IEER.
- Retrofit providers can find it difficult to source employees with relevant skills, and lack a standardised method of benchmarking the skills of employees and potential employees.
- Experienced energy efficiency implementation professionals have no avenue for gaining independent recognition of their knowledge and capabilities.
- People that might consider entering the industry don't have a clear pathway for developing the knowledge and capability required to lead IEER projects.
- In some cases, components of an IEER project are led by different people, without someone in an overarching role that is focused ensuring that each component contributes to the agreed energy efficiency outcomes. This can make it more difficult to maintain continuity of intent through all project stages, which can impact on project outcomes.
- Education providers have limited guidance on how training offerings could be improved to better meet industry needs.

2.4 A targeted response – accrediting individuals to lead IEERs

In response to these issues, the Energy Efficiency Council is proposing an accreditation scheme for the individuals that oversee and co-ordinate IEERs.

The scheme will offer one entry level registration and two levels of accreditation:

- **Affiliate registration;**
- **Associate accreditation;**
- **Certified Energy Efficiency Professional (CEEP) accreditation.**

2.5 Scheme scope and governance

The proposed scheme is squarely targeted at the individuals that oversee and co-ordinate IEERs of commercial buildings. This is a critical role in the delivery of a specific type of commercial building retrofit. However there are many other roles in the retrofit industry, some of which have established accreditations in place. There are also other models for the delivery of commercial building retrofits.

The scheme does not seek to accredit other roles in the retrofit industry, or affect other delivery models for commercial building retrofits. Rather, it will set and maintain standards for the individuals charged with ensuring that IEER projects are effectively delivered, and complement other standards and accreditations that are already in place.

⁵ While larger property groups generally have the time and expertise to make this judgement on their own, small and medium sized property owners and managers rarely do.

The Energy Efficiency Council will administer the scheme, however membership of the EEC will not be a requirement for accreditation. An independent assessment panel will conduct assessments, and an independent Steering Committee made up of industry, government and other experts will oversee the scheme's management. For more information on the proposed governance arrangements for the scheme, see Chapter 4.

2.6 Benefits of accreditation for professionals

Accreditation as an Associate or CEEP will give current energy efficiency implementation professionals independent recognition of their knowledge and capabilities. The scheme will communicate the importance of this role to customers, government and other stakeholders, ensuring that Associates and CEEPs are recognised as leaders in the delivery of IEER projects. In addition, accredited individuals will be part of a community of professionals working to improve standards and practices in the delivery of IEER projects, building the reputation of the industry as a whole.

Aspiring energy efficiency professionals will be provided with a clear pathway into the industry, and stepping stones that recognise their journey towards becoming a leader in the delivery of IEER projects. Importantly, Affiliates and Associates will join a community of more experienced peers that can provide advice and support.

2.7 Benefits of accreditation for companies

The companies that deliver IEERs will also benefit from the introduction of a national accreditation scheme. Accreditation will define essential knowledge, capabilities and experience that aspiring professionals need to develop. This will provide a framework for the internal education and training programs of IEER providers, significantly reducing duplication of effort across the industry. In addition, the independent recognition that comes with accreditation will verify the rigour of internal training, and act as a driver for improving these programs over time.

For the first time, companies that wish to begin providing IEERs will have an industry standard that allows them to identify skills gaps in their staff, and access to a clear framework for increasing staff capacity.

More broadly, a key goal of the scheme will be to ensure commercial building owners and managers are aware of the benefits of engaging an Associate or CEEP to oversee an IEER project. As awareness of the scheme grows, having accredited individuals on staff will become an important selling point when engaging with potential customers.

2.8 Benefits of accreditation for customers and education providers

Energy efficiency customers - the building owners and managers that procure IEERs - will be a clear beneficiary of accreditation. Accreditation will provide customers with a straightforward way to determine whether an individual put forward by an IEER provider has the knowledge and capability to lead a project. The scheme will also provide an independent complaints mechanism that customers can utilise if they believe an Associate or CEEP has breached the professional Code of Conduct established by the scheme (see Section 4.5). Perhaps most importantly, energy efficiency customers will benefit from the improved project outcomes that result from the introduction of commonly agreed standards for knowledge and capability across the industry.

Accreditation will also assist education providers. The scheme will provide clear guidance on how current educational offerings should evolve to meet industry demand for skilled professionals to fill this role. In addition, accreditation will open up opportunities for the development of new training programs targeted at energy efficiency implementation professionals on the pathway to accreditation.

3 Accreditation - how it will work

3.1 Introduction

This section details the proposed approach for assessing and accrediting individuals that oversee and co-ordinate IEERs.

This chapter begins by providing an overview of the general approach taken to accreditation and the specific registration and accreditations proposed (Sections 3.2 and 3.3). It then describes the required qualifications, experience, knowledge and capabilities expected at each level (Sections 3.4 through to 3.7), before providing a detailed explanation of the assessment process and metrics (Sections 3.8, 3.9 and 3.10). It concludes by setting out the requirements for maintaining registration and accreditation and the renewal process (Sections 3.11 through to 3.15).

3.2 Approach to accreditation

Successful delivery of an IEER relies on a range of technical specialists from various construction and energy efficiency fields. The IEER Accreditation Scheme will not accredit these specialists. Rather, accreditation will recognise the individuals that have developed the knowledge and capabilities that allow them to oversee and co-ordinate an entire IEER project.

Even those individuals that achieve the highest level of accreditation possible under the scheme will not be experts in every area involved in an IEER; the range of technical knowledge is simply too broad. Rather, they will be experts in effectively overseeing and coordinating the breadth of activities that are required to deliver an IEER, including scoping the project, business case development, overseeing implementation, verification of energy savings and ongoing project maintenance. This will ensure that the agreed energy efficiency objectives are driven through every stage of project delivery.

Three levels of registration and accreditation have been defined. These levels have been designed to ensure that current and aspiring energy efficiency implementation professionals have entry points into the scheme that are appropriate to their qualifications and experience. They also provide graduates and new entrants to the industry with a clear pathway for gaining the knowledge and capabilities necessary to oversee and co-ordinate IEER projects.

3.3 Detailed description of registrations and accreditations

The IEER Accreditation Scheme will offer one entry level registration and two levels of accreditation:

- **Affiliate registration;**
- **Associate accreditation;**
- **Certified Energy Efficiency Professional (CEEP) accreditation.**

Affiliate is an entry level registration available to anyone that has the minimum qualifications or experience, and wishes to specialise in IEER projects. There is no assessment of knowledge or capability. Individuals registering as an Affiliate are indicating their intention to progress to the Associate accreditation, and possibly to the CEEP accreditation.

Associate accreditation is available to energy efficiency professionals that have gained experience working as part of a project team delivering IEERs, and are ready to begin leading IEERs. Candidates for Associate accreditation may have a background in IEERs or single technology retrofits. Accreditation certifies that they have the knowledge and capabilities necessary to oversee and co-ordinate simple IEER projects in their entirety.

Ideally Associates will lead projects under the supervision of an individual with more experience (generally a CEEP). Associates may also gain further experience working as a member of a project team when opportunities to lead projects are not available.

Individuals that are accredited as an Associate may apply to have their accreditation upgraded when they have gained the extra experience and knowledge necessary to become a CEEP.

Certified Energy Efficiency Professional accreditation is available to experienced energy efficiency professionals. Accreditation certifies that they have the knowledge, capabilities and practical experience necessary to oversee and co-ordinate complex IEER projects in their entirety.

3.4 Required qualifications and experience

Candidates for registration as an **Affiliate** with a relevant qualification do not need any project experience; Candidates without a relevant qualification must have one year's experience working on commercial building retrofits projects.

Candidates for accreditation as an **Associate or CEEP** must demonstrate that they have experience working on commercial building energy efficiency retrofit projects. There are different experience requirements for Associates and CEEPs depending on their qualifications (see Table 3.1).

Candidate's qualification	Minimum experience implementing commercial building energy efficiency retrofits		
	Affiliate	Associate	CEEP
Degree in engineering, architecture, surveying, construction management or project management Mechanical or electrical trade qualification	None	1 year	3 years
No relevant qualifications	1 year	3 years	5 years

Table 3.1: Minimum required experience working on commercial building retrofit projects for Affiliates, Associates and CEEPs.

Experience implementing commercial building energy efficiency retrofits may include time spent implementing single technology retrofits. Candidates for Associate accreditation may have a background solely in single technology energy efficiency retrofits. However in the course of assessment, they will be expected to demonstrate knowledge across the range of technologies that may be incorporated in an IEER project.

By contrast, Candidates for CEEP accreditation must have experience leading IEERs. They must have either:

- led three IEER projects in their entirety, or
- be able to demonstrate that they have an equivalent amount of experience leading IEERs across a range of retrofit projects, and have experience leading each discrete stage of an IEER project.

3.5 Required knowledge and capabilities

Candidates for registration as an **Affiliate** are not assessed on their knowledge and capabilities, as it is an entry level registration.

Candidates for accreditation as an **Associate** will be assessed against ten primary 'knowledge and capability areas' that have been identified as essential for the effective delivery of IEER projects (Table 3.2).

Candidates for accreditation as a **CEEP** will be assessed against the same ten areas, however the 'required attributes' in each area will be more stringent than for Associate Candidates, and a greater emphasis will be placed on the experience of the candidate. CEEP Candidates will also be assessed against five secondary areas that are highly desirable for ensuring that an IEER project is overseen and co-ordinated in an integrated way (Table 3.2).

Candidates with relevant industry certifications, such as Certified Measurement and Verification Professionals (CMVPs) and Certified Energy Managers (CEMs), will not be tested on their knowledge in the areas covered by their certification. However they will still need to demonstrate their ability to apply this knowledge in the context of an IEER project.

Primary knowledge and capability areas (for both Associate and CEEP Candidates)		
No	Area	Description
1	Project management	Ability to effectively oversee and co-ordinate an IEER project
2	Audits and measures	Ability to oversee an energy audit process and convert energy conservation measures into a scope of works
3	Procurement pathways	Ability to effectively utilise appropriate procurement pathways
4	Whole of system and services thinking	Ability to take an integrated, multi-disciplinary approach to the design and construction process
5	Business case development	Ability to undertake cost benefit analyses and develop business cases
6	Energy consumption	Understanding of energy consumption, collection, billing, modelling and analysis
7	Energy efficiency technology	Understanding of energy efficiency technology, systems and processes
8	Measurement and verification	Ability to effectively apply measurement and verification processes and standards for energy savings
9	Risk management	Ability to effectively manage the risks associated with an IEER project
10	Stakeholder engagement	Ability to effectively manage the stakeholders involved with an IEER project
Secondary knowledge and capability areas (for CEEP Candidates only)		
11	Project parameters and context	Understanding of relevant legislation, standards, energy efficiency programs and grants
12	Project justification	Ability to undertake a project justification review
13	Performance management	Ability to oversee an effective performance management process
14	Ongoing maintenance	Ability to implement IEER projects with minimal disruption to equipment operation
15	Behaviour change	Ability to address behaviour change as part of an integrated approach to IEER projects

Table 3.2: Knowledge and capability areas. Both Associate and CEEP Candidates are assessed on the primary areas. Only CEEP Candidates are assessed on the secondary areas.

3.6 Documents for submission with application

Candidates for accreditation as an **Associate** will be required to provide a detailed project management plan for an IEER project they have worked on (Table 3.3). It is not necessary for the candidate to have personally prepared this project management plan. It will be used by the Independent Assessor to ask questions based on a real world project the candidate is familiar with.

Candidates for accreditation as a **CEEP** will be required to submit more detailed project documentation, some of which they must have personally prepared (Table 3.3). This documentation will be part of the evidence the Independent Assessor uses to assess the candidate against the fifteen knowledge and capability areas. CEEP Candidates will also be questioned on this documentation during the interview.

Accreditation level	Documentary evidence required for submission by Candidates for accreditation
Associate	<p>A project management plan for a project the Associate candidate has worked on. This project management plan should incorporate:</p> <ul style="list-style-type: none"> • an Energy Conservation Measure list and the resulting scope definition; • a procurement plan highlighting the methodology used to justify the selected procurement pathway; • a project schedule (a Gantt chart or milestone table); • a budget; • a risk register. <p>It is not necessary for the candidate to have prepared this plan.</p>
CEEP	<p>1) Three project management plans from projects the CEEP has worked on. Each project management plan should incorporate:</p> <ul style="list-style-type: none"> • measurable energy savings objectives and project outcomes; • a procurement plan highlighting the methodology used to justify the selected procurement pathway; • a project schedule (a Gantt chart or milestone table); • a budget; • a communications plan; • a risk register with mitigation actions. <p>If a submitted project management plan is not entirely written by the CEEP candidate, the candidate must clearly indicate which sections they produced.</p> <p>2) A cost benefit analysis of competing Energy Conservation Measures and a measures prioritisation evaluation produced by the CEEP candidate for a recent project.</p> <p>3) A measurement and verification plan produced by the CEEP candidate for a recent project, including metering schedules and energy targets for all major sub-systems after project completion.</p>

Table 3.3: Documentation for submission with applications for accreditation.

3.7 The distinction between the Associate and CEEP accreditations

Both Associates and CEEPs will be accredited to lead IEER projects. However the scheme's guidelines will recommend that Associates lead simple IEER projects, and that complex projects are lead by CEEPs.

For this recommendation to be useful, it is necessary to provide guidance on what constitutes a 'simple' IEER project. Table 3.4 lists some straightforward metrics for differentiating between simple and complex IEER projects. Of course many projects will sit somewhere between 'simple' and 'complex'. The point of the table is to assist Associates and their supervisors to determine which projects are appropriate for Associates to lead.

Project characteristic	Simple IEER projects	Complex IEER projects
Required integration with existing systems	Project works require minimal integration with existing building systems	Project works require significant integration with existing building systems
Number of control systems	The building has fewer than three control systems that need to be upgraded and integrated as part of the project	The building has three or more control systems that need to be upgraded and integrated as part of the project
Significance of design revision	The project focuses on a like-for-like replacement of old plant with new plant, without major revisions to the size, capacity or functional capability of the mechanical / electrical systems	The project requires major revisions to the size, capacity or functional capability of the mechanical / electrical systems
Level of access	The building has a small number of tenants, and works can take place during business hours with minimal disruption	The building has many tenants and / or works must take place outside of business hours, or are likely to require tenants to relocate on a temporary basis

Table 3.4: Some general characteristics of simple and complex IEER projects.

The understanding that Associates are accredited to lead simple IEER projects, that CEEPs are accredited to lead all types of projects, and the broad characteristics of 'simple' and 'complex' projects provided in Table 3.4 will give providers a useful metric to judge an individual's capability. It will also increase the ability of customers to judge whether an individual put forward to lead their project has an appropriate level of expertise.

3.8 Overview of the assessment process for Associates and CEEPs

Candidate chooses accreditation level

Candidates for accreditation must decide whether to apply for accreditation as an Associate or a CEEP. Candidates must review the required qualifications, experience, knowledge and capabilities for each level of accreditation, and decide which level is most appropriate for them.

Candidate submits application form

Based on this decision, Candidates will then fill in either an 'Associate' or 'CEEP' application form. The application form will contain short answer questions on the knowledge and capability areas for the level of accreditation they have chosen (see Table 3.2). These questions will address both theoretical issues that test a candidate's underpinning knowledge, as well as asking them to describe how they have addressed practical issues in the course of implementing IEER projects. Candidates will also be required to submit supporting evidence, which will differ for Associates and CEEPs (see Table 3.3).

Candidate's application is reviewed

After the Candidate submits their application, it will be reviewed by an Independent Assessor. Any referees nominated by the candidate may be contacted, and in some cases the assessor may contact the candidate directly in order to clarify an issue raised by their application.

The Independent Assessor will make a preliminary determination on whether the application is strong enough to proceed to an interview. Applications that the independent assessor determines are not strong enough to proceed will be notified and provided with a statement of reasons for the decision.

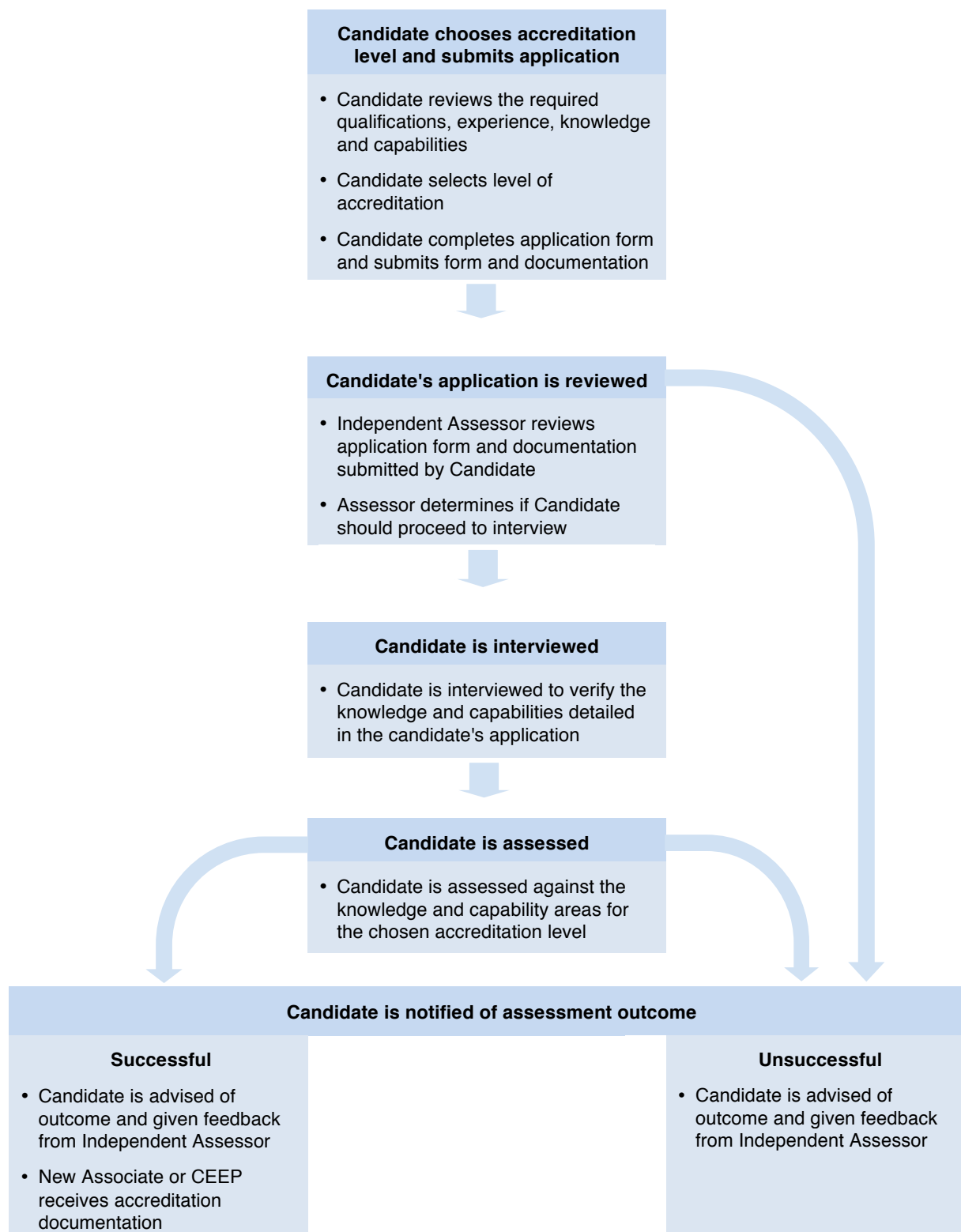


Figure 3.1: Overview of assessment process

Candidate is interviewed

Candidates with a strong application will proceed to an interview with the Independent Assessor. This interview will test the depth of knowledge and capabilities detailed in the candidate's application. In particular, the Independent Assessor will seek to determine the candidate's ability to apply their knowledge in the practical context of an IEER project.

Candidate is assessed

Following the interview, the Assessor will assess the Candidate against the knowledge and capabilities for the level of accreditation they have chosen, taking into account all evidence (i.e. the application form, supporting documentation and the interview).

Each area will be marked either 'Satisfactory' or 'Not satisfactory'. Candidates for Associate must achieve a 'Satisfactory' rating in each of the ten primary knowledge and capability areas. Candidates for CEEP must achieve a 'Satisfactory' rating in the ten primary areas and the five secondary areas.

To achieve a 'Satisfactory' rating, Candidates for CEEP accreditation will be expected to display higher levels of knowledge and experience in the ten primary knowledge and capability areas than Candidates for 'Associate' accreditation (see Section 3.9 - Assessment Panel, manual and metrics).

Candidate is notified of assessment outcome

Following assessment, scheme staff will communicate the Independent Assessor's determination to the Candidate. All Candidates will receive feedback from the Independent Assessor on their performance in each knowledge and capability area. Unsuccessful Candidates will also receive advice on what they need to do should they wish to reapply.

Successful Candidates will receive an Accreditation Pack containing important documentation, such as a copy of the Code of Conduct and the scheme's Terms and Conditions, details on the complaints process, and instructions for maintaining accredited status.

3.9 Assessment Panel, manual and metrics

The EEC Board will appoint the Assessment Panel. It will have a minimum of three and a maximum of six members at any given time, and will consist of individuals with the expertise necessary to assess Candidates in the fifteen knowledge and capability areas. Because of the required skill set, in many cases members of the Assessment Panel will be energy efficiency implementation professionals that are currently working in the industry. However, where possible, assessors that are recently retired from the industry will be sought.

Prior to assessment taking place, Candidates will be notified of who their assessor will be, and will have one opportunity to veto the choice of assessor (for example, a candidate may wish to veto a proposed assessor that works for a direct competitor in the same geographic region). If a candidate exercises their veto right, their application will be forwarded to another member of the Assessment Panel. The candidate will not have a veto right over this second Assessor.

The Independent Assessor will be provided with an Assessment Manual that sets out the assessment process. The Assessment Manual will describe the metrics that will underpin the assessment process:

- **Required attributes** – those attributes that need to be displayed by the candidate to gain a 'Satisfactory' rating in each knowledge and capability area. The required attributes in each area are different for Associates and CEEPs.
- **Evidence guidelines** – specific guidelines on what the assessor should look for to determine whether a candidate has the required attributes in each area.

The required attributes that underpin each knowledge and capability area will be provided to potential Candidates, giving them a strong indication of what assessors will look for during the assessment process. The evidence guidelines that set out the specific criteria the Independent Assessor will use to score Candidates - such as the answers to questions posed in the application form and interview - will remain confidential. The required attributes for Associates and CEEPs can be found at Appendix B.

The Assessment Manual will also provide the Independent Assessor with instructions on how to approach each phase of the assessment process:

Assessor reviews the candidate's application

The Assessment Manual will set out the approach the Independent Assessor should take to determine whether the candidate should proceed to interview. After considering the candidate's application in light of the relevant knowledge and capability areas, the Independent Assessor must form the view that the Candidate has a reasonable prospect of being awarded accreditation.

Assessor interviews the candidate

The Assessment Manual will provide the Independent Assessor with example questions for each knowledge and capability area. These questions will be for guidance only; the Independent Assessor will have latitude to ask the questions it considers necessary to determine whether the Candidate displays the required attributes in each area.

Assessor scores the candidate

The Assessment Manual will include a scoring sheet which sets out the knowledge and capability areas, the required attributes and the evidence guidelines. The Independent Assessor will be required to provide a mark of 'Satisfactory' or 'Not satisfactory' against each area, as well as feedback on the Candidate's performance in each area. This feedback will be provided to both successful and unsuccessful Candidates.

3.10 Confidentiality

All material supplied by Candidates in the course of the application process will be treated as strictly confidential by both the scheme administrators and the Independent Assessor.

Assessors, administrators, the Steering Committee and the EEC Board will be bound by the EEC's Privacy Policy, which will be available on the EEC website.

3.11 General requirements for maintaining registration and accreditation

Adherence to the Code of Conduct and Terms and Conditions

Affiliates, Associates and CEEPs will be required to adhere to the Code of Conduct and the scheme Terms and Conditions. Complaints regarding breaches of the Code of Conduct or Terms and Conditions will be referred to the Complaints Subcommittee of the Steering Committee for formal review.

The draft Code of Conduct is set out in Section 4.5.

Submission of a Continuing Professional Development Log

Affiliates, Associates and CEEPs will be required to submit an annual Continuing Professional Development (CPD) Log. The CPD Log will describe professional development activities undertaken in the course of the year and how they relate to the fifteen knowledge and capability areas. 'Development activities' may include:

- Taking up opportunities to develop new knowledge and capabilities through on the job experience
- Internal training
- External training
- Conferences
- Reading and other research

Affiliates, Associates and CEEPs that have not submitted their annual CPD logs will be ineligible to have their registration or accreditation renewed.

3.12 Additional requirements for Associates and CEEPs

Submission of project case studies

In addition to the requirements above, Associates and CEEPs will need to demonstrate that they are actively working on IEER projects to maintain their accreditation. This active engagement is required to ensure that their skills, experience and knowledge remain current.

It is proposed that Associates and CEEPs submit three one-page project case studies for projects they have worked on during the three year accreditation period. Associates and CEEPs that have not submitted three case studies (and have not obtained an exemption) would be ineligible to have their accreditation renewed.

Exemptions

Occasionally Associates and CEEPs may work on a large, multi-year project which prevents them from submitting case studies for the required three projects. In these circumstances the Associate or CEEP may apply for an exemption, and instead supply yearly updates on the activities undertaken in the course of a multi-year project.

Exemptions for other exceptional circumstances would be considered by the Steering Committee on a case by case basis.

Affiliates

Affiliates would not be required to submit project case studies.

3.13 Duration of registration and accreditation

Terms of registration and accreditation will commence on the date Candidates are formally notified that their application has been successful. The durations for registration and accreditation are set out in Table 3.5.

Status	Duration
Affiliate registration	Two years
Associate accreditation	Three years
CEEP accreditation	Three years

Table 3.5: Duration of registration and accreditations

3.14 Renewal of registration and accreditation

Affiliates

Affiliates will be contacted three months prior to the expiry of their registration with the information they need to renew. They will be required to submit a short form indicating their wish to renew their registration.

To be eligible to renew their registration, affiliates must have:

- submitted the required CPD logs
- adhered to the Code of Conduct and Terms and Conditions
- filled out the renewal of registration form
- paid the required fee
- confirmed their agreement to continue to be bound by Code of Conduct and the Terms and Conditions.

Associates and CEEPs

Associates and CEEPs will be contacted six months prior to the expiry of their accreditation with the information they need to renew.

To have their application for renewal considered, Associates and CEEPs must have:

- submitted the required CPD logs
- submitted the required project case studies
- adhered to the Code of Conduct and Terms and Conditions
- filled out the Renewal of accreditation form
- paid the required fee
- confirmed their agreement to continue to be bound by Code of Conduct and the terms and conditions.

A member of the Assessment Panel will review the individual's performance by:

- reviewing submitted project case studies
- reviewing CPD logs
- contacting client referees.

If the individual's performance is found to be satisfactory, the renewal of their accreditation will be approved.

3.15 Application and renewal fees

The application fee charged to Candidates, and the renewal fee charged to Affiliates, Associates and CEEPs, are yet to be determined. Minimising the cost of registration and accreditation for industry participants will be a key consideration when fees are set. High costs, either in terms of administration time or fees, will act as a disincentive to become accredited.

Cost is also relevant for the scheme administrator. In order to be self-sustaining, accreditation fees or other forms of revenue must be sufficient to cover implementation and running costs.

The EEC is currently seeking support from partners for the costs associated with establishing the scheme. Fees for the first round of registrations and accreditations will be announced shortly.

3.16 Questions on Chapter 3

Feedback on the following questions, or any other aspect of this report, is welcome.

Section	Question
<i>3.3 Detailed description of registrations and accreditations</i>	<ul style="list-style-type: none"> Do the broad categories of registration and accreditation provide a clear pathway for new entrants to the industry?
<i>3.4 Required qualifications and experience</i>	<ul style="list-style-type: none"> Are the required qualifications and experience for the various levels of registration and accreditation set at the right level?
<i>3.5 Required knowledge and capabilities</i>	<ul style="list-style-type: none"> Given that they will be implementing 'simple' IEER projects, are the ten knowledge and capability areas that Candidates for Associate accreditation will be assessed on appropriate?
<i>3.6 Documents for submission with application</i>	<ul style="list-style-type: none"> Is the list of documents for submission reasonable? Would there be any issues providing the listed documents to assessors?
<i>3.7 The distinction between the Associate and CEEP accreditations</i>	<ul style="list-style-type: none"> Is the difference between Associate and CEEP accreditations clear? Does this distinction get the balance right? How can it be improved? Are the characteristics of 'simple' and 'complex' IEER projects appropriate? How could they be improved, or added to?
<i>3.8 Overview of the assessment process for Associates and CEEPs</i>	<ul style="list-style-type: none"> Is the assessment process clear? Is there any way it could be clarified or improved?
<i>3.9 Assessment Panel, manual and metrics</i>	<ul style="list-style-type: none"> Is it reasonable for the knowledge and capability of Candidates to be assessed by an experienced professional from another energy efficiency provider? Is giving Candidates the right to veto the choice of assessor on one occasion a useful mechanism for dealing with perceived conflicts of interest? Are the required attributes that have been defined for each knowledge and capability area appropriate (Appendix B)? How could they be improved?
<i>3.10 Confidentiality</i>	<ul style="list-style-type: none"> Are the proposed confidentiality provisions adequate?
<i>3.11 General requirements for maintaining registration and accreditation</i>	<ul style="list-style-type: none"> Will the proposed CPD program be effective in encouraging individuals to engage in ongoing professional development?
<i>3.12 Additional requirements for Associates and CEEPs</i>	<ul style="list-style-type: none"> Is the submission of project case studies the best way to ensure accredited individual's knowledge and capabilities remain current?
<i>3.13 Duration of registration and accreditation</i>	<ul style="list-style-type: none"> Are the durations proposed for registrations and accreditations appropriate?
<i>3.14 Renewal of registration and accreditation</i>	<ul style="list-style-type: none"> Is the process outlined for renewing accreditation reasonable? How could it be improved?

4 Scheme governance

4.1 Introduction

This chapter provides important background on the goals, scope, governance and administration of the scheme.

It begins with a brief overview of the governance mechanisms that will be established to ensure good administration, independence and transparency (Section 4.2). It then provides drafts of the scheme policy (Section 4.3), the scheme scope (Section 4.4) and the Code of Conduct that will govern the activities of Associates and CEEPs (Section 4.5). It concludes by summarising the complaints and reviews processes that will operate under the scheme (Section 4.6).

4.2 Overview of scheme governance

The IEER Accreditation Scheme has been designed to be impartial and meet the needs of customers, energy efficiency providers, governments and the general public.

The scheme will be operated by the Energy Efficiency Council. As with all other Council activities, the EEC Board will ultimately be responsible for the proper management of the scheme.

To ensure impartiality, transparency and independent oversight, the EEC Board will appoint two independent groups that will have a central role in the administration of the scheme:

- A Steering Committee comprised of representatives from industry, government, customers and other experts. This Committee will oversee the activities of the staff that administer the scheme (the Secretariat), the Assessment Panel, and the complaints process.
- An Assessment Panel comprised of industry experts. Members of this Panel will be responsible for assessing applications for accreditation.

The Board will delegate the day to day administration of the IEER Accreditation Scheme to the scheme Secretariat, which will be staffed by EEC employees and overseen by the independent Steering Committee.

The Secretariat will be the primary point of contact for Candidates, accredited individuals, companies listed on the Company Directory, and other stakeholders. It will also co-ordinate and support the activities of the Steering Committee and the Assessment Panel.

4.3 Draft scheme policy

The scheme policy is a succinct overview of the scheme's purpose. As such, it provides an important reference point for decision making in the administration of the scheme. By setting out the scheme's purpose, the policy also guides the development of metrics for monitoring the scheme's performance.

Draft Policy

Integrated Energy Efficiency Retrofit Accreditation Scheme

Promoting the effective delivery of Integrated Energy Efficiency Retrofits in Australia's commercial buildings

The purpose of Integrated Energy Efficiency Retrofit Accreditation Scheme is to promote the effective delivery of Integrated Energy Efficiency Retrofits (IEERs) of Australia's commercial buildings. To that end, the IEER Accreditation Scheme accredits the knowledge and capabilities of the individuals that oversee and coordinate the delivery of IEERs.

The IEER Accreditation Scheme is designed to create pathways for new entrants into the industry, support the achievement of planned energy efficiency project outcomes, reduce project risk, and facilitate the procurement decisions of energy efficiency customers. It does this by defining and maintaining industry standards for the delivery of IEERs.

The Energy Efficiency Council's role

The Energy Efficiency Council (EEC) is the peak body representing Australia's energy efficiency industry. The EEC administers the IEER Accreditation Scheme to support the energy efficiency sector and promote responsible, efficient and effective energy use across the Australian economy.

Policy commitments

In fulfilling its role administering the IEER Accreditation Scheme, the EEC will:

- Define the capabilities, processes and experience necessary for individuals to deliver effective IEERs.
- Provide accreditation to the individuals that meet these criteria, regardless of EEC affiliation.
- Provide a clear pathway for individuals wishing to enter the sector.
- Maintain an impartial, objective and confidential application process based on independent assessment by relevant experts.
- Maintain an independent Steering Committee responsible for oversight of the scheme.
- Provide an impartial complaints process for the customers of accredited individuals.
- Ensure that fees and charges for Candidates are reasonable and do not impose a significant impost or barrier to entry.
- Provide a transparent process for continual improvement of the scheme, taking into consideration scheme performance, government policy, industry requirements, and the views of interested parties.
- Provide a framework for accredited individuals to improve their knowledge and capabilities over time.
- Encourage continual improvement of broader industry practices by promoting scheme success stories, innovative case studies, and publishing aggregated, anonymous data regarding industry performance.
- Ensure efficiency and consistency by building on existing education, training, accreditation and standards.
- Comply with legal and regulatory requirements applicable to the scheme.

4.4 Draft scheme scope

In contrast to the scheme policy, the scheme scope is a more technical document that provides the formal definition of an IEER, the specific accreditations offered, the coverage of the scheme and the definition of a commercial building. The scheme scope provides clarity about what is covered by the scheme, and what is not.

Draft Scope

Integrated Energy Efficiency Retrofit Accreditation Scheme

Promoting the effective delivery of Integrated Energy Efficiency Retrofits in Australia's commercial buildings

The Integrated Energy Efficiency Retrofit Accreditation Scheme is a national scheme for individuals that implement Integrated Energy Efficiency Retrofits (IEERs) of commercial buildings.

Definition of an Integrated Energy Efficiency Retrofit

The IEER Accreditation Scheme recognises two broadly defined models of IEER:

Standard IEER

A standard IEER is a commercial building retrofit that:

- Considers all major energy uses within the building when identifying opportunities for energy conservation and reducing greenhouse gas emissions. This may include (but is not limited to) heating, ventilation and cooling (HVAC) systems, lighting systems, control systems, water systems and the building envelope.
- Takes a comprehensive approach to design, incorporating multiple technologies when appropriate.
- Takes a considered approach to implementation, effectively integrating project measures with the building's existing systems.
- Includes all stages of a building energy efficiency retrofit, including scoping; energy reviews / audits; procurement, tendering and evaluation; business case development; technical design / specification; procurement, tendering and evaluation; implementation; commissioning; tuning; measurement and verification; ongoing project maintenance.

IEER with performance guarantees

An IEER with performance guarantees is:

- An Integrated Energy Efficiency Retrofit (as defined above) that also includes contractual guarantees regarding the energy performance of the building following the retrofit. This includes, but is not restricted to, Energy Performance Contracts (EPCs).

Registrations and accreditations offered by the IEER Accreditation Scheme

The IEER Accreditation Scheme offers one entry level registration and two levels of accreditation:

Affiliate registration

An Affiliate is an individual that wishes to specialise in IEER projects. To register as an affiliate, an individual must meet the minimum requirements for qualifications or experience. Their knowledge and capabilities are not assessed.

Associate accreditation

An Associate is an individual with the qualifications, skills, knowledge and practical experience necessary to oversee and coordinate the effective delivery of a simple IEER in its entirety.

Certified Energy Efficiency Professional (CEEP) accreditation

A CEEP is an individual with the qualifications, skills, knowledge and practical experience necessary to oversee and coordinate the effective delivery of a complex IEER in its entirety.

Coverage

- Associates and CEEPs are accredited to deliver IEERs of commercial buildings within Australia and its territories.

Definitions and exclusions

- For the purposes of the scheme, 'commercial buildings' are all building classes identified by the Building Code of Australia, excluding Class 1, Class 2, Class 4, Class 8 and Class 10.
 - It is noted that accredited individuals are likely to be capable of retrofitting multi-residential and industrial buildings with similar features to commercial buildings. However given the specific challenges associated with retrofitting some buildings in these categories, the IEER Accreditation Scheme does not accredit for the provision of these services.
 - The scheme does not cover individuals that can oversee part of an IEER but not all of it (i.e. energy efficiency auditors or single technology retrofit experts).
 - The scheme does not cover activities undertaken outside Australia and its territories.
-

4.5 Draft Code of Conduct

The IEER Accreditation Scheme Code of Conduct sets out the standards of professional conduct required of Affiliates, Associates and CEEPs. It provides guidance to assist them in carrying out their duties and responsibilities, and a basis for assessing complaints regarding their professional conduct. Adherence to this Code of Conduct will be a mandatory requirement of accreditation.

Draft Code of Conduct

Integrated Energy Efficiency Retrofit Accreditation Scheme

Promoting the effective delivery of Integrated Energy Efficiency Retrofits
in Australia's commercial buildings

Associates and CEEPs shall:

- Provide objective, accurate and outcome focussed advice, ensuring energy efficiency opportunities are identified, considered and assessed from the earliest stages of project design through to project completion.
 - Ensure project activities comply with applicable legislation, and undertake reasonable steps to ensure compliance by employees, sub-contractors, sub-consultants, or other third parties undertaking project work for or on behalf of the Associate or CEEP.
 - Undertake reasonable steps to ensure suitably qualified and experienced persons are engaged to undertake project activities.
 - Conduct project work in accordance with a rigorous quality assurance framework.
 - Ensure that data analysis and project plans are developed on the basis of valid and accurate data.
 - Ensure that clients are provided with the project information necessary to fairly assess performance.
 - Maintain appropriately detailed project records, including accurate project objectives and outcomes.
 - Provide project documentation to the scheme administrator within a reasonable timeframe when requested (subject to confidentiality requirements).
 - Undertake ongoing Continuing Professional Development in accordance with the scheme's guidelines.
 - Identify and declare conflicts of interest to clients as soon as possible.
 - Not participate in collusive or anti-competitive conduct.
 - Adhere to project and client confidentiality requirements.
 - Not advertise, present or discuss services in a manner that may discredit the sector, the profession or the IEER Accreditation Scheme.
 - Use the name or Logos of the IEER Accreditation Scheme in the manner outlined in the scheme rules.
-

4.6 Complaints and reviews

Formal complaints will be reviewed by the 'Complaints Subcommittee' of the independent Steering Committee. The process for addressing complaints will differ depending on the type of complaint. Three types of complaints will be defined under the scheme rules:

- Candidates for registration or accreditation may lodge a complaint if they wish to challenge the outcome of their assessment.
- Energy efficiency customers may lodge a complaint against Affiliates, Associates or CEEPs if they believe a breach of the Code of Conduct or Terms and Conditions has occurred.
- Any Scheme participant may lodge a complaint regarding the administration or governance of the scheme.

All complaints processes shall follow the principals of procedural fairness. The Complaints Subcommittee will have the power to request an investigation by a member of the Assessment Panel if more information is required. They will then make a determination in relation to the complaint.

Decisions by the Complaints Subcommittee may be appealed to the full Steering Committee. Decisions of the Steering Committee shall be final.

All decisions by the Complaints Subcommittee and all other decision made under the Scheme will be documented. Complainants and affected individuals will be provided with a written statement of reasons for decisions where relevant.

4.7 Questions on Chapter 4

Feedback on the following questions, or any other aspect of this chapter, is welcome.

Section	Questions
<i>4.2 Overview of scheme governance</i>	<ul style="list-style-type: none">• Are you satisfied with the mechanisms that have been put in place to ensure the independence and transparency of the scheme? How could they be improved?
<i>4.3 Draft scheme policy</i>	<ul style="list-style-type: none">• Is the scheme's purpose effectively articulated? How could it be clarified?• Is the role of the Energy Efficiency Council clear?• Do you agree with the policy commitments listed? Are there any you would remove, refine or add?
<i>4.4 Draft scheme scope</i>	<ul style="list-style-type: none">• Is the definition of IEERs clear? How could it be improved?• The intent of the scheme is to cover 'commercial building retrofits'. Is the formal reference to the Building Code of Australia's classes helpful?• Do you agree with the exclusions that have been identified?
<i>4.5 Draft Code of Conduct</i>	<ul style="list-style-type: none">• Are the provisions of the Code of Conduct reasonable?• Do any of the requirements in the Code of Conduct conflict with other professional responsibilities?
<i>4.6 Complaints and reviews</i>	<ul style="list-style-type: none">• Are you satisfied with the mechanisms that have been put in place to ensure that complaints and reviews are handled at arms length from the EEC?

Appendix A: Designing the scheme

Project background

In 2010, Sustainability Victoria engaged the EEC to undertake a scoping study of roles in the retrofit process and to assess the need for the introduction of accreditation and standards into the industry. The resulting study, *Energy Efficiency in Commercial Building, Accreditation and Skills Scoping Report*,⁶ concluded that accreditations and standards should play a central role in supporting the sustainable growth of capacity in the sector.

This report recognised the benefits of many existing accreditation programs, including those run by Engineers Australia, the Green Building Council of Australia and the Australian Institute of Refrigeration, Airconditioning and Heating. It also identified gaps where additional accreditation schemes could provide value. It found that the most urgent need was for an accreditation scheme to cover the individuals that directly oversee and co-ordinate the entire retrofit process, and potentially a linked scheme for Energy Service Companies (ESCOs).

In 2011, the EEC was commissioned by Sustainability Victoria (on behalf of the National Framework for Energy Efficiency) to facilitate the design of a framework for such an accreditation scheme. After extensive consultation with a range of experts from industry and the broader sector, the resulting framework was detailed in the report *Proposed Energy Efficiency Accreditation Scheme for Retrofit Service Providers*.⁷ As well as defining the framework for accreditation, this report also comprehensively mapped the steps involved in an IEER project.

Finalising design

In 2012 the EEC moved to finalise the design of the scheme in preparation for its implementation in mid 2013. To ensure that the scheme met the needs of the sector as a whole, the EEC Board established a process that saw the design and implementation of the scheme managed by an independent Steering Committee. This Steering Committee is made up of experts from state and federal governments, the energy efficiency industry, the property industry and the broader sector. The Steering Committee is charged with managing the scheme's final design phase, signing off on the ultimate design, and overseeing the implementation of the scheme. The EEC Board retained authority over the decision to implement the scheme, and matters such as budgeting and resourcing.

A Project Team based within the EEC was established to undertake the final consultation and design work. A Technical Reference Group of industry experts and other stakeholders was also convened to provide detailed technical advice on the key design elements. In addition, legal firm Baker & McKenzie were engaged to provide ongoing advice on the design of the scheme.

Key design considerations

One of the first tasks of the project team was to define the key considerations that would govern the design process. Some of the most critical of considerations are set out below.

Accessibility

It is important that no unnecessary barriers are put in place that could prevent access to the scheme for industry. Therefore Energy Efficiency Council membership will not be a requirement for accreditation.

Independent oversight, assessment and review of complaints

For the scheme to be credible, the oversight, assessment and complaints mechanisms need to be, and be seen to be, robustly independent. To this end, an independent Steering Committee made up of industry, government and other stakeholders will maintain an oversight role over the scheme.

⁶ Available at bit.ly/147IGPv

⁷ Available at bit.ly/10ILawf

EEC staff will have no role in assessing applications for accreditation. Applications will be assessed by members of an independent Assessment Panel. Formal complaints, whether they relate to the assessment process, accredited individuals, or scheme administration will be reviewed by the Steering Committee, who may in turn request a formal investigation.

The Steering Committee will also review the scheme's performance and provide guidance to the Board on improvements to the scheme, including changes to scope, systems and processes.

Coverage of existing industry

Growing the capacity of the energy efficiency sector occurs in two ways – by increasing the skills of current industry participants and providing a pathway for new entrants. For accreditation to be effective it must be accessible to enough of the existing industry to reach a critical mass. Setting standards too high would make the scheme inaccessible, would result in too few accredited individuals and would have minimal impact on the market. Setting standards too low would have little impact on the behaviour of current participants, and would reduce the usefulness of the scheme for energy efficiency customers seeking competent providers.

Therefore the standards required in the assessment process must be set at a level that is both rigorous and allows enough individuals to be accredited to meet reasonable demand for retrofit services.

Creating pathways for new entrants

It is critical that the scheme is designed in such a way that it provides clear and accessible pathways for new entrants to the industry, and does not create exclusive benefits for incumbents.

Meeting customer demand

It is important the scheme is designed in a way that makes it straightforward for building owners (including governments), facility managers and other key decision makers to identify individuals that can provide an acceptable level of service in retrofits. For the commercial sector, this requires that the purpose and scope of the scheme is clearly communicated, so that building owners and managers understand the benefits of engaging a company that employs an accredited individual.

For the government sector, it is critical that the final scheme design is 'fit for purpose' and able to be incorporated into government procurement processes as easily as possible. This is being achieved through ongoing consultation with government throughout the design process, as well as aligning the scheme with existing mechanisms, such as the Victorian Government's Prequalification Panel for the provision of Energy Performance Contracting (EPC) services.

Minimising cost

The costs associated with the scheme will be an important consideration for those considering accreditation. High costs, either in terms of administration time or fees, will act as a disincentive to become accredited.

Cost is also relevant for the scheme administrator. In order to be self-sustaining, accreditation fees or other forms of revenue must be sufficient to cover implementation and running costs. Designing a streamlined scheme that does not impose unreasonable overheads on the scheme administrator and users is a key design consideration.

Minimising risk

The scheme must have robust probity processes and adhere to the principles of procedural fairness. This is essential for the reputation and effectiveness of the scheme, as well as ensuring that legal risk is minimised for the scheme administrator. Designing processes for active risk identification and mitigation are an important component of the scheme design.

Benchmarking the model for the scheme

The approach taken by this scheme addresses the particular circumstances of the Australian energy efficiency retrofit market. However the model was arrived at after carefully reviewing the approach taken by other accreditation schemes in Australia and around the world. In addition to desktop research, members of the Project Team:

- Conducted interviews with a range of organisations running accreditation programs within Australia.
- Conducted an interview with the President of the National Association of Energy Service Companies (NAESCO) on the history of ESCO accreditation in the United States.
- Conducted interviews with one of the key designers of the United Kingdom's Energy Efficiency Accreditation Scheme.
- Travelled to Singapore to discuss the individual and company accreditations jointly operated by Singapore's National Environment Agency and Building Construction Authority.
- Travelled to New Zealand to study the individual accreditations operated by the Energy Management Association of New Zealand (EMANZ).

Revising and refining the model for the scheme

Based on interviews, research, feedback from the Technical Reference Group and further analysis, the design outlined in previous reports has been significantly refined. Most notably, the model for individual accreditation has been expanded to incorporate recognition for entry level, intermediate and experienced roles, to ensure that there is a clear pathway for individuals entering the industry. The company accreditation envisaged in previous papers is also in the process of being revised, and the EEC is currently exploring the option of launching a directory of IEER providers. These revisions and refinements better align the scheme design with the needs of sector and ensure that it is well placed to increase the quality of practices and outcomes over time.

Appendix B: Knowledge and capability areas and required attributes

This appendix lists the required attributes for each knowledge and capability area. Required attributes are the attributes that assessors will look for when assessing Candidates.

This list will be provided to potential Candidates, giving them a strong indication of what assessors will look for during the assessment process. The evidence guidelines that set out the specific criteria the independent assessor will use to score Candidates - i.e. the answers to questions posed in the application form and interview - will remain confidential.

For the primary ten areas, required attributes are listed for both Associates and CEEPs. For the five secondary areas, only the required attributes for CEEPs are listed, as Associates will not be assessed on these areas.

Primary areas and required attributes

(for both Associate and CEEP Candidates)

Area 1 - Project management	
Ability to effectively oversee and co-ordinate an IEER project	
Required attributes - Associates	Required attributes - CEEPs
<ul style="list-style-type: none"> Recent and relevant experience working as part of a team implementing energy efficiency retrofits of commercial buildings; A practical appreciation and working knowledge of the principles, skills and techniques required for management of Integrated Energy Efficiency Retrofits throughout the project life cycle from inception to completion; Familiarity with key components of construction project management including scope, cost & procurement, time, risk, contract management, environmental management, and workplace safety & injury management. 	<ul style="list-style-type: none"> Recent and relevant experience leading the implementation of Integrated Energy Efficiency Retrofits of commercial buildings; A practical appreciation and working knowledge of the principles, skills and techniques required for management of Integrated Energy Efficiency Retrofits throughout the project life cycle from inception to completion; Familiarity with key components of construction project management including scope, cost & procurement, time, risk, contract management, environmental management, and workplace safety & injury management.

Area 2: Audits and measures	
Ability to oversee an energy audit process and convert energy conservation measures (ECMs) into a scope of works	
Required attributes - Associates	Required attributes - CEEPs
<ul style="list-style-type: none"> Can describe the steps taken to convert ECMs into a deliverable and costed scope of works. 	<ul style="list-style-type: none"> Can describe the steps taken to convert ECMs into a deliverable and costed scope of works; Experience includes overseeing an energy audit / assessment process.

Area 3: Procurement pathways

Ability to effectively utilise appropriate procurement pathways.

Required attributes - Associates	Required attributes - CEEPs
<ul style="list-style-type: none"> • Understanding of the various procurement pathways that can be utilised on IEER projects; • Ability to identify the advantages and disadvantages associated with different procurement pathways in relation to a particular project; • Understanding of when and how to involve various specialists within the context of a particular project. 	<ul style="list-style-type: none"> • Understanding of the various procurement pathways that can be utilised on IEER projects; • Ability to identify the advantages and disadvantages associated with different procurement pathways in relation to a particular project; • Familiarity with the supplier market for IEER projects, including the services provided by various specialists; • Understanding of when and how to involve various specialists within the context of a particular project; • Knows which service providers can be grouped together and has a methodology for selecting and grouping suppliers.

Area 4: Whole of system and services thinking

Ability to take an integrated, multi-disciplinary approach to the design and construction process

Required attributes - Associates	Required attributes - CEEPs
<ul style="list-style-type: none"> • Can describe the benefits of approaching project design from an integrated perspective that includes materials and products, building structure, enclosure and building services. 	<ul style="list-style-type: none"> • Can describe the benefits of approaching project design from an integrated perspective that includes materials and products, building structure, enclosure and building services; • Demonstrates ability to take an integrated, multi-disciplinary approach to the construction process.

Area 5: Business case development

Ability to undertake cost benefit analyses and develop business cases

Required attributes - Associates	Required attributes - CEEPs
<ul style="list-style-type: none"> • Awareness of different cost benefit analysis methodologies, and ability to identify which is best suited to a particular project/client; • Able to describe the various cost/benefit factors that should be taken into consideration. 	<ul style="list-style-type: none"> • Awareness of different cost benefit analysis methodologies, and ability to identify which is best suited to a particular project / client; • Able to describe the various cost benefit factors that should be taken into consideration; • Demonstrates the ability to develop effective business cases which incorporate a long term view of the facility and equipment life; • Demonstrates ability to adapt to particular client requirements (e.g. simple cost / payback vs. full technical and commercial feasibility).

Area 6: Energy consumption

Understanding of energy consumption, collection, billing, modelling and analysis

Required attributes - Associates	Required attributes - CEEPs
<ul style="list-style-type: none"> • Understanding of all energy uses within a commercial building and how they relate to each other and the building's total energy consumption; • Understanding of building / green energy issues, trends, legislation and programs • Ability to read and understand energy use profiles; • Understands how to verify consumption accuracy of meters. 	<ul style="list-style-type: none"> • Understanding of all potential energy uses within a commercial building and how they relate to each other and the building's total energy consumption; • Understanding of energy markets, pricing and tariffs; • Understanding of building / green energy issues, trends, legislation and programs; • Ability to read and understand energy use profiles; • Understands how to verify consumption accuracy of meters; • Ability to verify whether meters have been installed properly and are working correctly.

Area 7: Energy efficiency technology

Understanding of energy efficiency technology, systems and processes

Required attributes - Associates	Required attributes - CEEPs
<ul style="list-style-type: none"> • Understands energy efficiency principles and can apply them appropriately (within the context of a particular project, taking into consideration commercial building type, scope of work and client requirements); • Understanding of commercial building technology and information processes; • Appreciation for which systems are typically used in different commercial building types. 	<ul style="list-style-type: none"> • Understands energy efficiency principles and can apply them appropriately (within the context of a particular project taking into consideration commercial building type, scope of work and client requirements); • Able to demonstrate selection of appropriate technology, systems and processes for various situations, taking into account building type, location, materials, design, shape, space, orientation, energy profile and operational user profile; • Able to deliver outcomes focussed energy efficiency assessments within client parameters and identify opportunities and cost implications, taking a long-term view; • Understanding of commercial building technology and information processes; • Appreciation for which systems are typically used in different commercial building types.

Area 8: Measurement and verification

Ability to effectively apply measurement and verification processes and standards

Required attributes - Associates	Required attributes - CEEPs
<ul style="list-style-type: none"> • Able to demonstrate knowledge of measurement and verification processes, standards and protocols, including the International Performance Measurement and Verification Protocol (IPMVP); • Understands the standards, guidelines and best practices relating to measurement and verification applicable to the project and scope of works being delivered; • Understands the difference between defects rectification, maintenance and building system tuning. 	<ul style="list-style-type: none"> • Able to demonstrate knowledge and experience of measurement and verification processes, standards and protocols, including the International Performance Measurement and Verification Protocol (IPMVP); • Understands the standards, guidelines and best practices relating to measurement and verification applicable to the project and scope of works being delivered; • Understands the difference between defects rectification, maintenance and building system tuning; • Ability to set points and controls, and adjust controls, set points, and the building management system based on building / user profile.

Area 9: Risk management

Ability to effectively manage the risks associated with an IEER project

Required attributes - Associates	Required attributes - CEEPs
<ul style="list-style-type: none"> • A working knowledge of the principles and techniques of risk management of energy efficiency projects; • Can describe the key components of construction / retrofit project risk management. 	<ul style="list-style-type: none"> • A practical appreciation and working knowledge of the principles and techniques of risk management of energy efficiency projects; • Can describe the key components of construction / retrofit project risk management; • A good understanding, and capability of identifying, organisational risk relevant to client needs and exposures.

Area 10: Stakeholder engagement

Ability to effectively manage the risks associated with an IEER project

Required attributes - Associates	Required attributes - CEEPs
<ul style="list-style-type: none"> • Sound communication skills; • Understands the principles of stakeholder engagement and consultation and how these can be used to effectively facilitate energy efficiency outcomes; • Able to identify the key stakeholders involved in an IEER project; • Understands the relationship dynamics between tenants and landlords. 	<ul style="list-style-type: none"> • Sound communication skills; • Understands the principles of stakeholder engagement and consultation and is able to apply these to effectively negotiate and facilitate energy efficiency outcomes; • Able to identify the key stakeholders involved in an IEER project; • Understands and can effectively manage the relationship dynamics between tenants and landlords.

Secondary areas and required attributes

(for CEEP Candidates only)

Area 11: Project parameters and context

Understanding of relevant legislation, standards, energy efficiency programs and grants

Required attributes - CEEPs

- Awareness and understanding of relevant standards;
- Ability to implement procedures that ensure compliance with all relevant standards;
- Awareness of the availability and criteria of relevant energy efficiency grant funding.

Area 12: Project justification

Ability to undertake a project justification review

Required attributes - CEEPs

- Experience with project justification and prioritisation processes;
- Practical knowledge of asset management practices;
- Able to undertake a project justification review that considers client objectives, functional requirements, risks and business impacts.

Area 13: Performance management

Ability to oversee an effective performance management process

Required attributes - CEEPs

- Understands the principles of performance management and the role it plays in setting measurable goals/objectives to verify achievement of performance.

Area 14: Ongoing maintenance

Ability to implement IEER projects with minimal disruption to equipment operation

Required attributes - CEEPs

- Has a good understanding of maintenance practices and scheduling in commercial buildings and how these could be impacted during and after a retrofit project.

Area 15: Behaviour change

Ability to address behaviour change as part of an integrated approach to IEER projects

Required attributes - CEEPs

- Has a clear understanding of the opportunities available in commercial buildings for “soft” energy improvement measures;
- Understands the concepts and procedures used under a green lease;
- Able to explain how to identify and implement “soft” improvement measures including behaviour changes and building envelope alterations to maximise the benefit of passive design elements (solar, climatic and seasonal);
- Experience with “soft” or non-mechanical energy efficiency measures.