



TRUSTMARK
Government Endorsed Quality

V1.0

TrustMark Licence Plus

Property Assessment
Requirements for
Scheme Providers &
Registered
Businesses





Background

The Licence Plus Scheme provides a transitional adoption of a ‘whole house / fabric-first’ approach for tradespersons improving domestic properties within the energy efficiency sector. It has been designed with the aim of helping build the much-needed supply chains by supporting the increased engagement of competent tradespersons in facilitating the drive for achieving the UKs ‘net zero’ targets. As the Licence Plus Scheme develops TrustMark’s ambition is to open the Scheme into the wider supported trade areas.

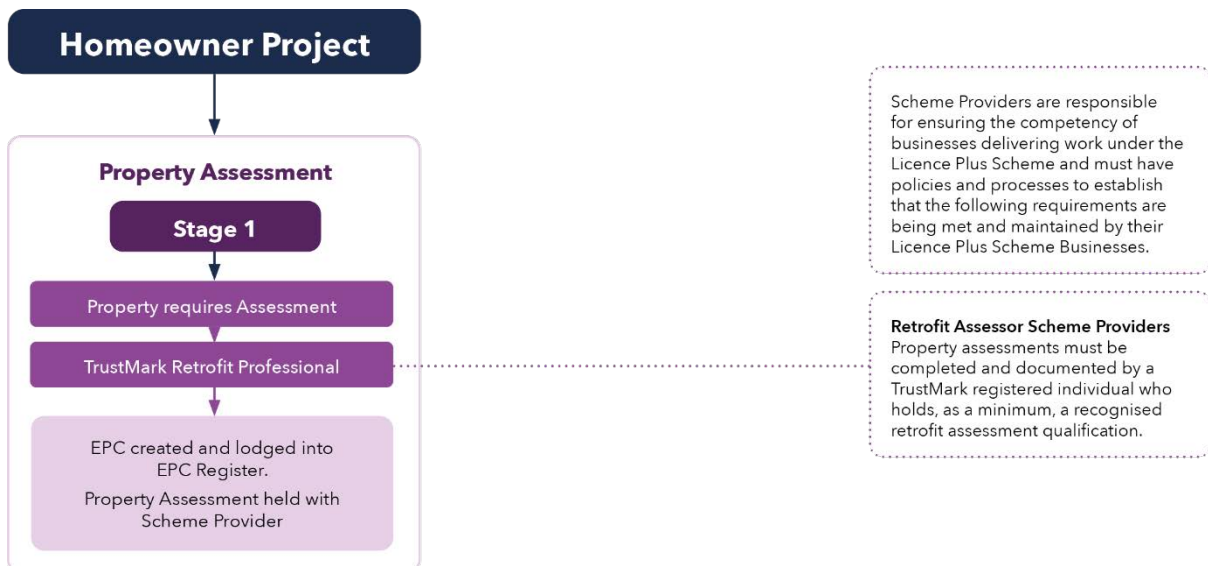
For the Licence Plus Scheme, we are adopting the property assessment principle of using Reduced Data Standard Assessment Procedure (RdSAP) process to produce an Energy Performance Certificate (EPC); identifying staged improvements that can be incorporated into the homeowner’s project to create a plan of future improvements.

This following text sets out the requirements that apply to TrustMark Registered Businesses, who are participating in the Licence Plus Scheme and what must be evidenced through their engagement with a TrustMark registered individual who holds as a minimum, a recognised retrofit assessment qualification.

Stage 1

Property Assessment

Both pre- and post-EPCs and assessments must be completed and lodged on the appropriate National Register¹ by a TrustMark registered Retrofit Assessor.



It is the responsibility of the installing Registered Business to ensure that a property is assessed and documented by a TrustMark registered individual who holds a minimum of

¹ <https://www.gov.uk/find-energy-certificate>



a recognised retrofit assessment qualification where adequate information is gathered to ensure that any proposed works are suitable for that property. The assessment must include:

- An appraisal of the dwelling's heritage, architectural features, structure, construction and condition of the installed building services (ventilation, heating, hot water and lighting) in sufficient detail to establish the suitability of the dwelling for improvement.
- An appraisal of the dwelling's construction in sufficient detail to establish the main materials, thermal transmittances (U values) and moisture properties of the main building elements, such as (exposed floors, walls and roofs) and the suitability of the dwelling for improvement.
- A measured survey to establish the overall dimensions of the dwelling's heat loss envelope (including any basements and attics), the dimensions of all building elements (exposed floors, external walls, roofs, etc.) and the dimensions of all window and door openings.
- Identification of constraints imposed by the site, e.g., elevation and exposure (to sun, wind and rain, major roads and industrial activity), access, party walls, rights of light, consideration of adjoining properties, etc.
- Identification of the installed building services (ventilation, heating, hot water and lighting systems and their controls), the locations of the equipment, the areas served and confirmation that the systems are working correctly (or otherwise).
- An appraisal of occupancy, including the number of occupants and any special considerations such as the presence of vulnerable persons, e.g., children or elderly people or those with disabilities).
- An assessment of the existing ventilation in accordance with Building Regulations Approved Document F and for Scotland, clause 3.14 Ventilation of the Building Standards Technical Handbook²
- Identification of any constraints imposed by the local planning authority (including requirements for planning permission, Listing as of Special Architectural or Historic Interest, Conservation Area constraints, Tree Preservation orders, etc.)
- Identification of the location and severity of any existing construction or structural defects or leaks.
- Identification of any energy efficiency measures already installed or proposed.
- Identification of the location and severity of any condensation and/or mould growth in the dwelling.

² <https://www.gov.scot/publications/building-standards-2017-domestic/3-environment/314-ventilation/>

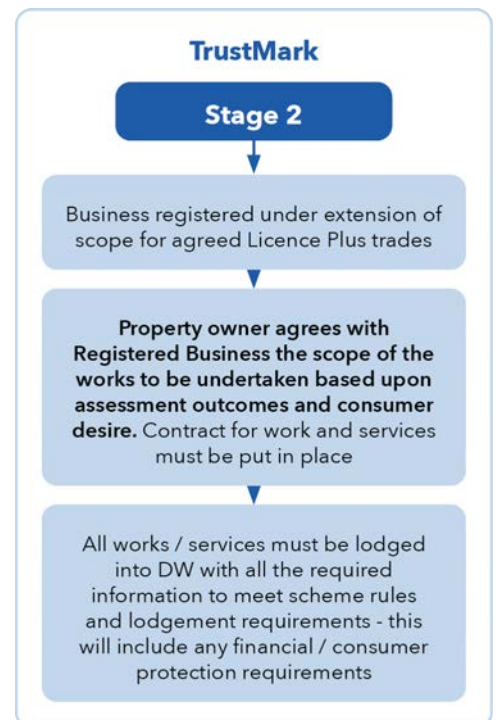


- Any intermittent extract ventilation fans or passive stack ventilators and where they are located.
- Any background ventilators (air inlets or “trickle ventilators”), their equivalent area and where they are located.
- Any other ventilation system and where it is located, including single room heat recovery ventilators (srHRVs), positive input ventilation (PIV), whole house mechanical extract ventilation (centralized cMEV or decentralized dMEV), and mechanical ventilation with heat recovery (MVHR); and, whether the identified systems are functional.
- Any intermittent or continuous extract ventilation fans should be checked in accordance with BSRIA guide BG46/2015 [7] to ensure that they are providing adequate air movement, and any incidence of inadequate air movement should be reported as part of the assessment.
- If the dwelling to be assessed is of traditional construction, an assessment of significance shall also be carried out in accordance with the guidance in BS 7913.
- All Stage 1 Assessments are required to be lodged by the Retrofit Assessor in the TrustMark Data Warehouse.
- Property assessment will include a tables summary of energy reductions, carbon savings and pay periods for measures recommended in EPC.

Stage 2

Customer Engagement & Lodgement

This stage is delivered by the TrustMark registered installer based on the agreed works established and contracted based on the pre-works property assessment. All works must be compliant with the TrustMark Code of Conduct, Customer Charter and any additional requirements placed by the installer’s Scheme Provider.

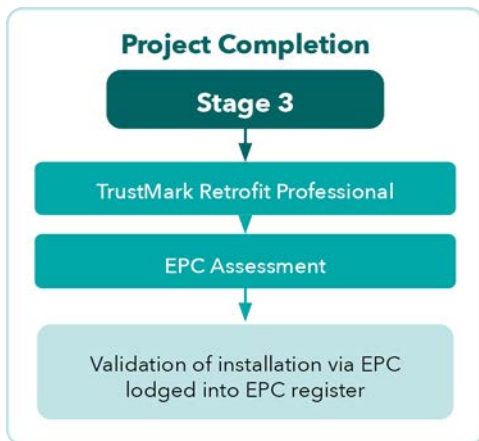




Stage 3

Post-install Requirements

As with Stage 1, the EPC must be completed and lodged on the National Register by a TrustMark registered Retrofit Assessor.



Licence Plus Applicable Standards

As part of the Quality Assurance process, lodgements will be audited to ensure that the following standards have been met:

- Building Regulations all AP documents but in particular Approved Documents F/L/C
- BS7913 Significance Assessment³
- BS 5250 Control of Condensation in Buildings⁴
- IP1/06 Assessment of thermal bridges.⁵

³ <https://knowledge.bsigroup.com/products/guide-to-the-conservation-of-historic-buildings/standard>

⁴ <https://knowledge.bsigroup.com/products/management-of-moisture-in-buildings-code-of-practice-1/standard>

⁵ <https://www.brebookshop.com/details.jsp?id=190683>



Ensuring that property and home improvement businesses deliver quality services with effective protection for consumers



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