

# **Applying to join the Energy Efficiency Experts register**

- ✓ **What joining the Energy Efficiency Experts register could mean for you**
- ✓ **The standards you will need to meet**
- ✓ **How to apply**

## Why a register?

As concerns about climate change and the urgent need to radically cut energy consumption and carbon emissions becomes better understood, more and more organisations are looking for authoritative advice on how they can operate sustainably, play their part in reaching a lower carbon future and keep energy costs to a minimum.

Energy efficiency advice is becoming a crowded marketplace. How can organisations be sure they are getting credible advice that will help them genuinely move forward – increase efficiency, cut emissions and get value for money from their energy spend?

## About the Energy Efficiency Experts register

Run by the Energy Institute, the chartered professional body for energy, the Energy Efficiency Experts register brings together many of the most experienced practitioners in the UK.

All those on the register hold a current, relevant chartered title, have a demonstrable track record in working effectively with organisations, are bound by a strict Code of Conduct and are also approved to act as ESOS Lead Assessors in the UK. Their areas of experience are recorded on the publicly accessible online register.

The EI Energy Efficiency Experts logo is a sign that individuals listed provide a service business can trust. It demonstrates that they have met stringent professional standards and have the knowledge, skills and experience to deliver authoritative energy advice and support.

There is more information about the Energy Efficiency Experts register at <https://www.energyinst.org/industry/energyefficiencyexperts>.

## What are the requirements to join?

To join the register, you will need to demonstrate that you provide high quality, reliable and knowledgeable services to business, that you meet industry standards, and demonstrate high standards of professionalism.

You will need to

- hold a chartered title in a relevant discipline, typically as a Chartered Energy Manager, Chartered Engineer (CEng) or Chartered Environmentalist (CEnv)
- be a professional member of the EI
- demonstrate that you meet the requirements of PAS 51215:2014 *Competence of a lead energy assessor*.
- provide evidence of direct and extensive and good quality consultancy experience, including a minimum of two years in the performance of energy audits/assessments related to energy used in a commercial setting, industrial processes or transport operations.
- agree to abide by the EI Energy Efficiency Experts Code of Conduct, which you can find at <https://www.energyinst.org/industry/energyefficiencyexperts> including maintaining your competence.

- Make a commitment to maintaining and developing your competence to ensure the advice you provide is up to date, relevant, timely and takes into account the opportunities provided by changing technologies.

## Maintaining your registration

Once you have joined the Energy Efficiency Experts register, there are a number of further requirements you'll need to meet on an ongoing basis to maintain your registered status.

You must

- complete the Acting as an ESOS Lead Assessor training module within 1 calendar month of being admitted to the register. Your approval to act as an ESOS lead assessor will not take effect until you have done so.
- maintain your professional membership of the EI and the chartered status which formed the basis of your acceptance to the register.
- maintain and develop your professional competence, including by
  - completing a minimum of 5 hours CPD relevant to the PAS and energy audit and assessment
  - setting two SMART learning objectives specifically related to your personal development in this area.
  - Submitting a record of your CPD demonstrating the above in accordance with the EI's annual deadline
- notify the EI immediately of any changes to your professional registration status, accreditations or certifications pertinent to your registration or listing on the EI website.
- notify the EI immediately if you are subject to any disciplinary procedure with a professional body, or your approval with another register of ESOS Lead Assessors changes – for example you also join another register, or your approval with another register is lapsed or removed, or you face proceedings from any body in relation to the professional registrations you hold.
- submit up to date evidence of your affiliations, credentials and appropriate Professional Indemnity within 28 days of a request from the EI.
- pay an annual registration fee.

Where these requirements are not met by individual registrants, they will be deemed to have allowed their registration to lapse and may be suspended or removed from the register.

## Making your application

You can download the application pack from the membership section of the EI website at [www.energyinst.org](http://www.energyinst.org). The pack includes an application form, guidance on how to apply and all the templates you will need to complete your application.

The application form is divided into three sections:

### Part A

**Part A** asks you to provide basic information about you, your background, and your certifications. This includes a brief personal overview of how you have developed your career to date and asks for evidence of your continuing professional development. You are also asked to sign a declaration that the contents of your application are accurate, you accept the register Terms and

	Conditions (including the EI's Privacy Policy), and that you agree to be bound by the Energy Efficiency Experts register Code of Conduct.
Part B	<b>Part B</b> is the competence grid, where you will need to give detailed and specific examples of how you have met the competences described in PAS51215:14 <i>Competence of a lead energy assessor</i> .
Part C	<p><b>Part C</b> deals with your experience to date specifically related to energy audit and low carbon services, and asks you to provide three examples of reports you have produced for clients – at least two of which must relate to energy audit and assessments carried out by you personally. You are also asked to</p> <ul style="list-style-type: none"> <li>• nominate three referees who can attest to your work</li> <li>• provide evidence of the sector experience you would like to be recorded in your register entry.</li> </ul>

You will need to attach evidence for some sections of the form.

Don't forget that you are applying for a registration which focuses on your professionalism, so it's essential that you follow the application guidelines and format and supply all the information requested. A key element of professionalism is the ability to communicate effectively, so make sure your communication skills are demonstrated in the way you put together your application. There is more information on how to complete the application form later in this document.

## When do I need to apply?

You can submit your application anytime.

Applications can take least 12 weeks from submission to result, so you should plan ahead and submit your application in good time if there is a particular time by which you hope to be registered. To avoid delays, please ensure that your application is clear, carefully answered and completed in full, and that your referees are aware that they will be hearing from us.

## What happens next?

We'll acknowledge your application and ask you to pay the application fee online.

Once your fee is received, the Professional Membership Team will check that your application is complete before sending it on to our assessors. They will review your application and determine whether, on paper, you have provided sufficient and relevant evidence to go forward for interview.

We will then contact you to arrange a time and date for interview. You will usually receive notification of the result of your interview within 7 working days of it taking place.

## Some key documents

There are two key documents you will need to refer to in the course of putting together your application and which you will be expected to be aware of and adhere to if your application is successful. You may also be asked about them specifically in your interview, including how they affect your practice and conduct as a professional.

These documents are reproduced in the application pack. Please be aware that they will be updated from time to time, and so you should check for updates before you make your application.

- 1) **The Energy Efficiency Experts Code of Conduct** (see <https://www.energyinst.org/industry/energyefficiencyexperts>)  
This describes the standards of conduct you must abide by as a member of the register, including providing general guidance on a number of specific areas. It should be read in conjunction with the EI's Code of Professional Conduct. A breach of the code could lead to disciplinary procedures being brought against you.
- 2) **PAS 51215:14 Competences**  
This sets out the competences for those acting as ESOS lead assessors.

### Other documents

- **CPD: The best you can be**  
This document explains the EI's CPD requirements and gives simple guidance on how to approach your CPD to get the most from your professional development. It is downloadable from the EI website at <https://www.energyinst.org/membership-and-careers/cpd>.

## Putting together your application to join the register

Your application is your opportunity to make your case that you meet the standards to join the register. Do remember our team of assessors will make their first judgments about your competence and professionalism on the basis of what you write and will continue to refer back to it throughout the application process, so it is essential that you complete it in full, and your application speaks for itself.



- Take your time over your application – it is an important document.
- Check and recheck to make sure that it fully represents your knowledge, skills, experience, commitment and professionalism.
- Make sure you have included all attachments and evidence indicated, and have answered questions fully.
- Ask others for their feedback.
- Don't forget that communication is one of the skills you'll be assessed on, so your application must be clear, comprehensive, complete and well expressed

### Part A

This is the main application form, which requests general information about you, your career, how you have developed your knowledge and the professional context in which you work. It introduces you and your application to our assessors and interview panels and sets the scene for the rest of what they will be reading and discussing with you.

It also asks you to

- tell us how you would like to appear on the register (sections 4 and 5),
- make a declaration - that your application is complete and accurate, and confirm that you agree to abide by the register requirements going forward, including the Code of Conduct.

There is a checklist to remind you of the enclosures you will need to submit in section 6.

### ***Your CPD***

You are asked to supply a record of how you have maintained and developed your professional competence over time. We advise that you use the EI's CPD template, available to download from the EI website, as this contains all the information you will need to record for this part of your application.

There is also general guidance on how to approach CPD in the [CPD section of the EI website](#), including our CPD guide, *The best you can be*, which tells you more about maintaining and developing your competence and making CPD work for you as a

professional. You will be asked to submit CPD records annually as one of the requirements for maintaining your registration.

### ***Qualifications, certifications and accreditations (section 3)***

- These should be in chronological order with the most recent at the top.
- We will need to see evidence of all the qualifications etc. you list in this section so you will need to provide copies of certificates or a letter of confirmation from the organisation which awarded you the title. These will need to be signed as true and accurate copies by someone who has seen the originals, for example, a professional member of the EI, your line manager, or a legal professional.

### ***Periods of approval on other registers (section 3)***

Where you currently hold or have previously held approval to act as an ESOS Lead Assessor through a body other than the EI, you will need to provide further information, including the reasons why any registrations have not been continued. We reserve the right to seek additional information from relevant organisations, and take into account any matters which may be raised which are potentially material to your professional practice or conduct and/or past compliance with ESOS requirements.

### ***Your register, your current work, and Professional Indemnity Insurance appropriate to you work (section 4)***

Some of those who wish to join the register will be working internally, within their own companies without contact with external clients. Where this is the case, applicants may opt out of appearing in the publicly facing register if they wish to do so, and pay a reduced rate for their registration.

Those working with external clients must appear on the register, and are required to also provide evidence that they hold appropriate Professional Indemnity Insurance.

### ***Your requested register entry (section 5)***

In this section you are asked to provide the text you would like to be used in your register entry, if your application to join the register is successful. The words you provide will be viewable by the public and will represent you and the services you offer, so please take time over this section. We recommend that you write in the first person and avoid abbreviations and jargon.

### ***Financial relationships***

Users of the register will be looking for impartial and independent advice, so it is essential that you declare if you have any financial relationships with any equipment manufacturers or suppliers of products and services. Failure to do so could result in removal from the register.

## Part B

### Competences of a lead assessor

Part B deals with the competence of lead energy assessors to ensure that quality energy efficiency assessments are carried out, and follows the requirements of PAS 51215 competences for which you will need to complete a competence grid. You will need to demonstrate you meet these standards to be admitted to the register.

Your completed grid should:

- include examples about you and the energy audit and assessment work you have done;
- be in the first person;
- address the competence being described.



Please use detailed and specific examples to describe your actual work rather than a theoretical example.

You should cross reference your statements in the competence grid with the reports you include in Part C wherever possible and look to write around 200 ~ 300 words for each competence.

There are prompts to help you complete the grid in the **Appendix A** to this document.

## Part C

### Section 1: Energy consultancy experience

In this section you are asked to give details of your main experience in energy and carbon audit, assessment and advice. This should be as recent as possible with the main focus on work completed in the last four years – if you cannot provide material which is recent please provide a covering note to explain why this is the case, but do also bear in mind we are looking to establish your *current* competence and that in some cases it may be advisable to refresh your experience before you make your application. You should record those pieces of work for which you **personally** carried out the work and were **directly responsible for the output, or** a specific part of it.

For each, please give a brief outline of the work you carried out for the client and the process you went through with them – **for example, scope of the project, operational context, the nature of the assessment, and techniques used and the benefit and/or value delivered to the client.**



As part of your listing, you should indicate

- where the work demonstrates your practical demonstration of the PAS in Part B
- where the piece of work you are describing is relevant to the sectors and areas of expertise you have indicated in section 3 of Part C.
- where you have provided a report for this project as one of the three you are asked to provide as part of your application (see below)
- where one of the three referees you are required to provide is for this project (see below)

## **Section 2: Reports and referees**

### *Reports*

As part of your application, you are asked to provide three consultancy reports. At least two of these must be for energy audits, and each of them should relate to the consultancy experience you have listed in the first part of Part C (your listing of your consultancy experience).

The audit reports should reflect the relevant elements of the PAS 51215 standards for production of technical and non-technical reports (see Part B) and identify relevant opportunities for improvement of energy efficiency and/or carbon reduction as a result of the assessment and review undertaken by you. You should seek permission from your client to share any reports you use, and redact any information which is of a confidential nature.

### *Referees*

You must provide three referees overall in your application. Where possible the referees you have selected should relate to the three reports you are providing as part of your application. If this isn't possible, please provide the contact details for up to two other clients, for whom you have undertaken direct consultancy work and who would be willing to provide a reference in relation to your professional conduct, understanding of the client requirements and ability to produce the required outcome. Your referees should relate to the experience you have listed in section 1) of Part C.

We will write to your referees on receipt of your application and so you should check that the individuals you nominate are willing to act for you. We may also ask you to chase your referees if no reference has been received within 28 days of our request - or ask you to supply an alternative referee if your referee does not respond to our enquiries. It will not be possible to progress your application if the required number of references is not received.

## **Section 3: Summary of experience**

The summary of experience will form the basis of your listing in the register, and you are likely to be asked about the areas you tick in this section in your interview. You should not tick an area of experience unless you have demonstrated this in C1.



To claim an area of experience in the register, you must be able to show that you have direct personal experience of providing energy audit and assessment services and/or carbon reduction advice in that sector or area, to a competent standard.

## Submitting your application

Please return your completed application by email to [efficiency@energyinst.org](mailto:efficiency@energyinst.org). We will acknowledge receipt within 10 working days.

## About the interview

The interview will usually last approximately 45-60 minutes and will be conducted online.

It will explore your level of skills, knowledge and experience on the basis of the information you have supplied in your application form, and the supporting evidence you have provided.

In particular, the panel will be looking to verify

- that you can demonstrate that you meet PAS 51215 in the conduct of your work.
- that you have a minimum of two years good quality experience
- the areas of experience you have requested to appear in your register entry
- your understanding of the Code of Conduct and its implications for your practice as a consultant, including your commitment to CPD

Given this, you should make sure you prepare thoroughly for your interview – as part of your preparation you should re-read your application and any material you have submitted, and take time to reflect on it.

As the interview is short, it is important that you give succinct and relevant answers. Please also be aware that, inevitably, there will also not be time to discuss each and every specific area of your experience.

The Panel's final decision will be based on the information you provide in your application form, **and** on the answers you give as part of the interview.

## Informing you of the outcome of your application

The Energy Institute will be in touch to inform you of the outcome of the interview within one week of your interview. The outcome of your application will be either:

- to confirm your admittance to the register on the basis your written application and interview – your personal statement and your areas of experience will appear on the register as in your application.
- to confirm your admittance to the register, with some requested amendments.
- to not register you at this time. If the panel do not feel able to support your application, feedback will be given, and it will be open to you to reapply at a future date if you wish.

We will formally add your details to the online publicly accessible register on receipt of your subscription fee and confirmation you have completed the Acting as an ESOS Lead Assessor online module.

## Requests for further information

Please note that we reserve the right to request further information from you at any stage in the application process.

## Your data and confidentiality

The EI takes protection of your personal data very seriously and all information you supply to us in association with your application to the register will be held in accordance with the requirements of our [privacy policy](#) and register Terms and Conditions. All participants in the process to review your application sign a confidentiality agreement.

By submitting your application to join the register, you are giving permission for the EI, and other parties working on behalf of the EI, to use the data, information and materials contained in your application for the purposes of assessing your eligibility for registration and ESOS Lead Assessor status, and in other routine administrative functions associated with the operation of the register.

## The Register

By signing up to the Register, you are giving consent for your Register entry to be placed in the public domain so that the EI can promote your services on the website and potential clients can contact you. The Register consists of:

- your contact details
- confirmation of your affiliations
- relevant certifications
- your areas of experience as verified by the panel.

Once registered, you may view your entry on the Register at any time by visiting the EI website at <https://www.energyinst.org/industry/energy-efficiency-register>

## **Keeping your entry up to date**

As a registrant, it is your responsibility to ensure that your entry on the Register is current and accurate. The EI cannot be held responsible for inaccuracies resulting from your failure to provide up to date information on your expertise, certifications, accreditations or any other detail pertinent to the Register.

If you wish to update any aspect of your entry on the Register, please contact us at [efficiency@energyinst.org](mailto:efficiency@energyinst.org).

### PAS 51215 competences - guidance on what could be included in your competence grid

Competence		This could include an ability to:
<b>PAS 1</b>	Understanding the operational context of the organisation being assessed	<ul style="list-style-type: none"> <li>Review potential issues and drivers that could affect implementation of opportunities</li> <li>Identifying legal requirements, guidelines, codes of practice and standards applicable to energy efficiency assessments</li> <li>Reviewing opportunities for improvement identified in the light of legal requirements, guidelines etc.</li> </ul>
<b>PAS 2</b>	Familiarity with, and ability to apply, the requirements of energy efficiency assessment methods	<ul style="list-style-type: none"> <li>Apply energy efficiency assessment principles, processes and techniques so that energy assessments are planned, conducted and reported in a consistent and systematic manner</li> </ul>
<b>PAS 3</b>	Scoping an energy efficiency assessment, as applicable to the organisation being assessed	<ul style="list-style-type: none"> <li>Define the scope of the energy efficiency assessment to be undertaken including an overview of the energy use and agreeing the scope with the organisation</li> </ul>
<b>PAS 4</b>	Understanding, in detail, of energy use and energy systems applicable to the organisation being assessed; (buildings, industrial, transport)	<ul style="list-style-type: none"> <li>Understand the operating principles and common opportunities for improvements in energy systems relevant to the scope of the assessment</li> <li>Applying the operating principles to analyse the applicable energy use and consumption</li> <li>Identify, discuss and agree with the organisation the competencies required for the assessment</li> <li>Assess and document the relevant competencies of the assessment team</li> </ul>
<b>PAS 5</b>	Managing energy efficiency assessment teams and budgets, and managing working relationships	<ul style="list-style-type: none"> <li>Maintain an overview of assessment activities, schedules and budgets</li> <li>Identify the resources required for the assessment including likely contingencies</li> <li>Organise information and knowledge to support effective planning of the assessment consistent with required outcomes</li> <li>Apply systems thinking to optimise the outcomes, balance new ideas with tried and tested solutions and balancing risk</li> <li>Take corrective action to deal with deviations from planned resource use</li> <li>Develop roles and delegate responsibilities to the assessment team</li> <li>Change existing plans to take account of unexpected organisational events</li> </ul>
<b>PAS 6</b>	Understanding the techniques of measuring, sampling, sub-metering,	<ul style="list-style-type: none"> <li>Optimise the use of energy data including measuring devices and instruments and third party data</li> </ul>

	and establishing an energy balance	<ul style="list-style-type: none"> <li>• Interpret, identify and challenge energy data to ensure meter accuracy and identify repeatability issues to ensure accurate and consistent results</li> <li>• Define sample size, sampling period and frequency for energy and other data for representative results</li> <li>• Define trials and/or laboratory analysis that might be required for the assessment</li> <li>• Interpret energy data and relate to observed operating conditions</li> <li>• Construct appropriate energy balances for different energy types at appropriate levels such as for whole organisation, individual site or individual unit operation.</li> </ul>
<b>PAS 7</b>	Data interpretation, including analysis and scrutiny of energy use, energy consumption, and energy performance data	<ul style="list-style-type: none"> <li>• Analyse energy use, consumption and efficiency</li> <li>• Identify trends, and investigate anomalies</li> <li>• Complement analysis with benchmark data as appropriate</li> <li>• Identify and quantify variables influencing energy consumption and efficiency</li> <li>• Identify and calculate energy performance indicators for the organisation and/or the scope of the assessment (which could include external as well as internal sources)</li> </ul>
<b>PAS 8</b>	Identification, quantification, ranking and prioritisation of opportunities for improvement	<ul style="list-style-type: none"> <li>• Use collected energy and other relevant data to understand energy use in order to identify opportunities for improvement</li> <li>• Use relevant technical and non-technical knowledge and skills to check assumptions, explain data and check applicability of identified opportunities for improvement</li> <li>• Develop a concept and cost for the potential implementation of opportunities</li> </ul>
<b>PAS 9</b>	Preparing and presenting a technical and non-technical report for an energy efficiency assessment	<ul style="list-style-type: none"> <li>• Produce a technical and non-technical energy efficiency assessment report (a minimum of 2 must be submitted as part of your application)</li> <li>• Produce a business case for improving energy performance</li> <li>• Make presentations of energy efficiency assessment findings to both technical and non-technical staff in the organisation being assessed (at least one example required - evidence can be PowerPoint or similar presentation)</li> </ul>