1 Introduction

This certification scheme is intended for those individuals that wish to become certified by CIBSE Certification and to be listed on the Whole Life Carbon Assessor Register.

This scheme provides an independent, third-party evaluation of an individual's competence to operate as a Whole Life Carbon Assessor (WLCA).

1.1 Who can apply?

Anyone can apply to become a Whole Life Carbon Assessment Practitioner, subject to successfully completing an approved assessment as described in section 2.

1.2 What can I provide as a Whole Life Carbon Assessment Practitioner?

As a Whole Life Carbon Assessment Practitioner, you can promote yourself as competent to provide life cycle carbon assessments in the built environment. Registered individuals have demonstrated a thorough understanding of the environmental and economic contexts that drive WLCA and learn how to report WLCA results effectively, presenting data clearly to both technical and non-technical audiences.

2 Technical Requirements for Whole Life Carbon Assessor

The Whole Life Carbon Assessor role as described above is based on having demonstrated competency through assessment on all of the stages covered by RICS Standard 'Whole Life Carbon Assessment for the Built Environment – 2nd Edition 2023'.

Certificates of successful completion of WLCA examinations provided by the following two providers are acceptable.

- WLCA Examination Certificate provided by CIBSE Training "Whole Life Carbon Assessment (WLCA) Practitioner Training"
- WLCA course Examination Certificate provided by RICS "Certificate in Whole Life Carbon Assessment Training Programme"

Certificates for equivalent courses with assessments may be considered for suitability on an ad hoc basis in future.

3 Open to all

The Whole Life Carbon Assessment certification scheme is open to anyone who wishes to be assessed, certified and registered as a CIBSE Whole Life Carbon Assessment Practitioner.

Providing one can meet the entry requirements in terms of competence and have proof of ongoing professional indemnity insurance, anyone may apply.

All applicants for certification and registration must also fulfil all of the applicable application requirements of this scheme description document. Once certified,

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compliance with all other requirements, including maintaining competence, for this scheme must be complied with of which registrants will be notified from time to time.

Note: Assessment of competence is mandatory during the application process and on an ongoing basis throughout the certification period e.g. complying with any requests for undergoing QA audits, assessments of CPD undertaken, maintaining Professional Indemnity insurance etc.

4 Certification & Listing on the Register

In order to become certified and to join the register you will be required to pass an examination(s) or equivalent evaluation taken under controlled conditions for which you are strongly advised to take appropriate training, see Sections 2 and **Error! Reference source not found.** above.

All applications for certification and registration on the Register are checked to ensure the individual's eligibility and that the necessary declaration has been signed.

Once in possession of your examination pass confirmation from the exam provider (usually in the form of a letter or certificate), individuals may complete their application to CIBSE Certification Ltd for certification and listing on the Whole Life Carbon Assessment Register by completing the relevant application form.

Additionally, you will need to:

- Provide evidence of your employer's Professional Indemnity Insurance (PII)
- Sign the CIBSE Certification Code of Conduct declaring that you will act only within your own areas of competence and that you will abide by all CIBSE Certification scheme rules
- Wherever possible, to act to reduce embodied and operation carbon emissions within your professional expertise.

Once it is confirmed that all the information required has been collected and reviewed by CIBSE Certification a decision regarding certification will be made.

You will be informed regarding this decision and if it is positive you will be added to the Whole Life Carbon Assessment Register and your certification documents issued.

Initial certification is for a period of three years with an annual registration fee, and maintenance requirements must be met – see Sections 6 and 6.

5 Application processes

Step 1, Evaluation – we expect you to fulfil the competence requirements to become a Whole Life Carbon Assessment Practitioner. You are required to take and pass an examination to demonstrate this. Proof of this is required as part of your application.

Application forms are available on the CIBSE Certification website.

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Step 2, Application – complete the application form for the Whole Life Carbon Assessment Register and submit it along with:

- A copy of your employer's current and applicable Professional Indemnity Insurance (PII) certificate
- A copy of your exam certificate (from Step 1 above)
- A copy of your signed CIBSE Certification Code of Conduct
- The applicable Certification fees (the application fee and registration fee).

Step 3, Review of the Certification file and Certification Decision – A full and comprehensive review of all the information provided is performed to determine whether you have met all of the requirements for certification.

The outcome of this review is either certification, a request to provide additional information or in some circumstances a rejection.

Step 4, Certification – A final check is performed to ensure that payment was successfully processed and you are added to the Whole Life Carbon Assessment Register and your certificate is prepared and issued.

Step 5, Maintenance of certification – There are specific requirements that you must meet to ensure your certification continues, see Section 6 below.

Step 6, Recertification – Certification is renewed every three years. The specific requirements for this are given in Section 7 below.

5.1 Special needs

Please let us know in advance if you have any relevant special needs or requirements that you think we should know about when processing your application. Any information you pass to us will be treated in confidence.

5.2 Fees

All fees are payable at the time of application for certification.

The fees for certification and inclusion on the registers are contained on the CIBSE Certification website at the following address: https://www.cibsecertification.co.uk

5.3 Changes of Details

Certified individuals shall inform CIBSE Certification by email within 14 days should any of the following change:

- Name
- Address
- Employer
- Trading status
- Trading name
- Company ownership
- Change in professional indemnity insurance (PII) e.g. provider, extent of cover

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- Any other significant change that may affect their certification including any doubt regarding your own ongoing competence

If in doubt please contact CIBSE Certification to discuss the change and any consequences for your ongoing certification.

6 Maintenance of Certification and website listing

6.1 General

It is your responsibility to make sure that you comply with all maintenance requirements. Failure to do so may put your ongoing certification at risk.

In order to remain certified CIBSE Certification will require all WLCA registrants to complete the following surveillance activities on an annual basis:

- Submit up to date Professional Indemnity Insurance (PII) if expired
- Submit CPD records in accordance with CCP 111
- Ensure requirements of the Certification Code of Conduct are upheld

An assessment maybe required if there is a major updates to RICS Standard 'Whole Life Carbon Assessment for the Built Environment – 2nd Edition 2023.

Further specific requirements will be informed to registrants as and when required. Please be aware that these may place more onerous requirements on you as a Whole Life Carbon Assessment Assessor.

6.2 Complaints

You must send details of any complaints that have received during the previous year associated with your Certification and Registration along with the details of the complaint resolution.

You will be liable for (or your employer) bearing the costs of investigating complaints where appropriate.

6.3 Continual Professional Development (CPD)

In order to develop your skills year on year we will ask you to undertake and keep a record of a minimum of 21 hours of ongoing training and continuing professional development (this is to be part of, and not in addition to, any existing Certification requirements you may already have to comply with).

Note: Whilst an assessment of competence is mandatory there are no formal requirements for applicants to undertake training of any kind or with any specific training body.

Specific CPD requirements are found in document CCP 111 which is made available to all registrants on the CIBSE Certification website and is also issued at the time of initial application.

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6.4 Further Training and Examination

You will receive notice from CIBSE Certification before any further examinations are required. Reasons for further training and examination are likely to include but not limited to:

- Major changes to regulations or certification scheme requirements
- Those reasons indicated elsewhere in this scheme description document

7 Recertification

Listing on the Whole Life Carbon Assessment Register is renewed annually but Certification is renewed every three years.

In order to renew your certification you will need to have complied with the maintenance requirements in Section 6 above, e.g., have informed us of any complaints and undertaken CPD in compliance with requirements, have up to date PII.

If you have complied with the maintenance requirements for the previous three years you will automatically be re-certified and re-registered on your current strands provided:

- You pay the fees required
- You sign a new CIBSE Certification Code of Conduct if applicable to show your commitment to the scheme requirements

By agreeing to recertification you are reaffirming your ongoing commitment to the declaration as signed at the time of your initial application.

In the following example circumstances you may be required to prove your ongoing competence by taking another examination:

1. If the requirements for certification change significantly during the third year of certification e.g. A Government Department introduces rules or regulations or a major update to *"RICS Standard 'Whole Life Carbon Assessment for the Built Environment – 2nd Edition 2023'".*
2. Your CPD has not been kept up to date and the correct minimum hours recorded

8 Suspension and Withdrawal of Certification

All certified and registered persons must remain compliant with the certification scheme requirements.

When a certified and registered person fails to meet certification scheme requirements their certification may be suspended or withdrawn.

It should be noted that withdrawal might also be a voluntary process.

Document CCP 136 Suspension Withdrawal and other changes to Certification details the definitions of various certification statuses and the process for any changes to those statuses, e.g. suspension, withdrawal of certification, reduction of

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the scope of certification or applying a period of respite; it also describes the circumstances where these may occur.

9 Respite from the Certification and Registration schemes

9.1 Policy

CIBSE Certification will allow a period of self-declared voluntary inactivity from the Register after which you will be allowed to resume your certification where you left off. This will be administered on a case-by-case basis and will be subject to certain conditions. In all cases CIBSE Certification will make all efforts to be reasonable and fair.

Reasons that may be considered acceptable include, but are not limited to:

- Maternity leave
- Long term incapacity due to illness or disability (physical or mental)
- Emotional distress
- Redundancy
- Overseas posting

9.2 Conditions

1) Respite can be requested for a period of up to 12 months
2) The respite period shall start on a date that you indicate to the Certification Systems Manager and you must give at least 4 weeks' notice
3) During that time you must have no ongoing involvement in building services engineering in the UK other than training/CPD
4) No more than one period of Respite shall be permitted sequentially
5) If after 12 months you do not resume your certification it shall be regarded as lapsed
6) It is your responsibility to ensure that at the end of the Respite period you contact CIBSE Certification to ensure ongoing certification and registration
7) During Respite you may take part in training and CPD activities at your own discretion
8) If as a result of a period of Respite you miss out on update training then you will have to take appropriate training and examination (where appropriate this may include taking the full course) to gain the necessary competencies to maintain certification
9) CIBSE Certification reserve the right to refuse a period of Respite and reasons for that will be provided to you
10) The Respite request will be recorded on our internal database

9.3 How to apply for respite

In the first instance you should write to the Certification Systems Manager, in confidence, stating:

- Your reasons for requesting Respite
- The period of time you require

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- Your proposed Respite start and end date

The Certification Systems Manager will respond to all applications within 7 days for simple cases, however for more complex cases this may be extended to 21 days.

10 Complaints about CIBSE Certification

CIBSE Certification operates a dispute and complaints procedure (CCP 101) that any individual (i.e. those that are potential, current, suspended or withdrawn from certification) may invoke at any time should they feel that:

- They have received poor service
- They have been refused entry to a scheme unfairly
- They have been excluded from the scheme unfairly
- That complaints against them have been unfairly upheld

End/-

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