NE02- Application Form

Bacra Dwelling EPC Scheme Membership

Introduction

This form needs to be completed in full to allow us to consider accepting you as An Energy Performance Certificate (EPC) Assessor for existing dwellings in Scotland within the Bacra Scheme - referred to as the ‘Scheme’.

This form should be completed with reference to the following three documents:

* Bacra EPC Assessor Scheme Criteria (NE01);
* Bacra EPC Assessor Scheme ‘Fit & Proper Person’ (NE03); and
* Bacra Code of Conduct (SP01).

1. Personal details

Please enter your personal details into the table below.

|  |  |
| --- | --- |
| Full name  (including title) |  |
| Address |  |
| Postcode |  |
| Telephone |  |
| Mobile No |  |
| Fax |  |
| Email Work |  |
| Email Other |  |
| Date of birth |  |
| Nationality |  |

2. Employer

Please enter the details of your current employer.

|  |  |
| --- | --- |
| Organisation name |  |
| Job Title |  |
| Type of organisation  *(please retain those that apply)* | Public sector Partnership  Limited company Sole trader  Registered Social Landlord Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Address  *(if different than above)* |  |
| Postcode |  |
| Telephone |  |

3. Insurance Details

All Energy Assessors must have Professional Indemnity and Public Liability Insurance. Please enter the details of your existing insurance details.

|  |  |  |
| --- | --- | --- |
|  | Professional Indemnity | Public Liability |
| Company providing Insurance |  |  |
| Reference |  |  |
| Start date |  |  |
| End date |  |  |
| Cover provided (£) |  |  |
| *Please attach copies of certificates* | | | |

4. Existing EPC Approvals & Training

Please provide details of any existing EPC approvals and training you may currently have, listing the organisation, Assessor ID and the geographical area covered.

|  |  |
| --- | --- |
| Are you **currently** certified to issue EPCs for existing domestic properties in England, Wales, Scotland or Northern Ireland or the EU? | Yes / No |
| If yes, please give details of current certifications *(Please list all – organisation, Assessor ID & geographical area covered )* |  |
| Have you **previously** been certified to issue EPCs in England, Wales, Scotland or Northern Ireland or the EU? | Yes / No |
| If yes, please give details of previous certifications *(Please list all – organisation, scheme, Assessor ID, area covered, start, end )* |  |

5. Fit Person Confirmation

Please see the Bacra EPC Assessor Scheme ‘Fit & Proper Person’ (NE03) document for this section of the form.

|  |  |
| --- | --- |
| Do you have a basic disclosure that is less than three years old? | Yes / No / Pending |
| If yes, or is pending, please give details here |  |
| Have you been convicted or cautioned for a serious arrestable offence including: murder; manslaughter; death by reckless driving; rape; kidnapping; firearms offences; hostage taking; hijacking or torture? | Yes / No |
| Have you been convicted of any offence against the person or property, or any offence which involves elements or acts of dishonesty, corruption, substantial financial gain or serious loss to anyone (including theft, fraud and deception), which resulted in a prison sentence within the last 5 years? | Yes / No |
| If yes to either question, please give further details separately |  |

6. Professional Memberships

Please list all professional memberships (if any) that you have or have had.

|  |  |  |  |
| --- | --- | --- | --- |
| Professional body | Level (e.g. member, associate) | Since (year) | Membership number |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

7. Relevant Qualifications after School and Further Education

Please list relevant post-school qualifications. Feel free to continue on a separate sheet, if necessary.

|  |  |  |
| --- | --- | --- |
| Qualification and level of attainment | Awarding body | Date |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

8. Relevant Training

Relevant training includes successfully passing courses related to energy assessment methods such as Standard Assessment Procedure (SAP) or Reduced data Standard Assessment Procedure (RdSAP).

Because it is also important to know how up-to-date you are, it is also important to list any refresher/annual courses for SAP or RdSAP you may have undertaken in any other Approved Organisation, and when these were undertaken.

Other training that may be relevant might include: structural surveys of properties, designing buildings, constructing buildings, assessing energy efficiency and, in some instances, an academic study of a building-related discipline.

Feel free to continue on a separate sheet, if necessary.

|  |  |
| --- | --- |
| Training Description | Dates |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

9. Work Experience

Please list recent work experience (i.e. within five years) and any prior experience related to undertaking energy performance certification of buildings. For example, this may include: energy rating of buildings, construction or design of buildings, structural surveys of buildings, or the provision of energy efficiency advice. Please indicate approx. numbers of EPCs completed if relevant

Feel free to continue on a separate sheet, if necessary.

|  |  |  |  |
| --- | --- | --- | --- |
| Organisation | Role / position | Relevant experience / projects | When? (start month & year to end month & year |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

10. Referees

Please provide details of two referees who can be contacted to provide professional and character references in the tables below.

|  |  |
| --- | --- |
| Referee 1 | |
| Full name  (including title) |  |
| Position and organisation |  |
| Relationship  to applicant |  |
| Contact address |  |
| Postcode |  |
| Telephone |  |
| Email |  |

|  |  |
| --- | --- |
| Referee 2 | |
| Full name  (including title) |  |
| Position and organisation |  |
| Relationship  to applicant |  |
| Contact address |  |
| Postcode |  |
| Telephone |  |
| Email |  |

11. Declaration & Undertakings

The Scottish Government’s ‘Operating Framework for Approved Organisations that oversee Energy Performance Certificates for New and Existing Buildings’ require Approved Organisations like Bacra to follow set standards and procedures. This includes fulfilling a number of responsibilities, such as maintaining accurate information about Bacra Scheme members and being prepared to share such information about members between Approved Organisations.

Bacra therefore require that the following specific undertakings and authorisations are agreed by the applicant.

**Authorisation from the Applicant**

I, the Applicant, agree to:

1. providing and maintaining accurate information

I will therefore notify Bacra of any change to any of the information provided in Sections 1 to 7 above as soon as is practicable. Specifically, this includes any changes to:-

* My personal details;
* My employer details;
* My insurance details;
* My existing EPC approvals and training;
* My ‘Fit Person’ confirmation;
* My Professional Memberships;
* My qualifications and training.

I will therefore ensure that details held in the Bacra database are up-to-date and true.

1. authorising bacra to obtain information about me with other approved organisations when required
2. I therefore authorise Bacra to request any information relating to my conduct and history of membership within any Approved Organisation or Body with which I hold, or have previously held, membership. This may include, but not be not limited to:

* All the information in this form, for all membership years;
* The quality of my EPC practice in that organisation;
* Details of any complaints made about me to that organisation;
* The nature and outcome of any investigations relating to my practice and behaviour undertaken by that organisation;
* Any breaches of codes of conduct by me;
* Any suspensions or removals from the Scottish EPC register involving me; and
* My payment record in relation to invoices, fees, charges etc. relating to my membership of that organisation or scheme run by that organisation.

1. I will therefore provide Bacra with, or authorise Bacra, to obtain from any relevant party, evidence required by Bacra to confirm that I have the necessary knowledge, experience and understanding to be admitted to membership of the Bacra Scheme and to be able to practice competently as a member of the Bacra Scheme within the Scottish context. This may include, for example: evidence of qualifications obtained, Continuing Professional Development (CPD) records, current and previous job roles and responsibilities, etc.
2. authorising bacra to share information about me

I therefore authorise Bacra to provide the Scottish Government, other Approved Organisations or an enforcement authority acting to meet its duty under legislation, with information relating to my membership of the Bacra Scheme. This information may include, but is not limited to, details on suspensions or withdrawals from the Scottish EPC Register of Assessors or membership of the Bacra Scheme, together with the reason for suspension or withdrawal.

1. bacra storing my information

I therefore authorise Bacra to store these details, my contact & training details on the Bacra database.

*Bacra will use the information you have provided in respect of the operation of its Scheme and in compliance with the requirements placed on Approved Organisations by the Scottish Government and legislation. Your information will be securely stored whether in hard copy or electronic formats.*

1. general terms

* I agree to abide by the Bacra EPC Scheme Code Of Conduct;
* I understand that failure to comply by the Scheme rules may result in suspension or withdrawal of my accreditation and removal from the register of Energy Assessors;
* All statements on this application are true and accurate to the best of my knowledge;
* Communication of compulsory and other notifications is primarily via email
* I agree to Bacra checking the validity of this information.

12. Agreement and Confirmation

|  |
| --- |
| Please sign below to confirm agreement with terms and to apply to join the Bacra scheme |
| Name *(print clearly)*.  Signature Date:  A non-returnable application fee of £100 will be included in your training fee. If you don’t intend to take the training course please include it with this form. (It counts towards the first year membership fee.)  The process on receipt of application is outlined in policy NE01. |

13. Optional Information

|  |  |
| --- | --- |
| Would you prefer only your limited details to be available on the Bacra website?  (under the framework agreement we are obligated to publish details of Assessors) | Yes / No |
| If no, which postcode areas do you cover ? |  |
| Would you like to received ‘information’ type emails ?  (Contain details of possible CPD events, changes in legislation etc) | Yes / No |

14. Evidence required

We require the following evidence to confirm your fit & proper status, identify and address.

|  |  |  |
| --- | --- | --- |
|  | Date on the document  (if required) | Attached  Yes/No |
| Agreement and Confirmation (Table 12 above) printed and signed |  |  |
| Disclosure document  *To be valid the Basic Disclosure (or PVG) certificate must not be more than three years old at the time it is presented to Bacra* |  |  |
| Photograph |  |  |
| Colour copy of ID from Group 1 - *needs one, see below* |  |  |
| Proof of ID & address from Group 2 -first |  |  |
| Proof of ID & address from Group 2 – second  *(Five if cannot produce one from Group 1 provided that one of these contains photographic identification; good quality colour photocopies are acceptable.)* |  |  |
| Evidence of key qualifications |  |  |
| Evidence of previous memberships of EPC Schemes |  |  |
| Insurance - Professional Indemnity for at least £50,000 per case, and Public Liability |  |  |

All documents produced must be in the name of the applicant (or the Bacra Scheme member):

**Group 1**

* Valid passport (any nationality)
* UK Driving Licence Full or Provisional – England/Wales/Scotland/Northern Ireland/Isle of Man; photocard only
* Valid photo identity card (EU countries only)
* UK Firearms licence
* HM Forces ID card (UK)

**Group 2**

* Marriage certificate/Civil Partnership Certificate
* Original UK birth certificate (issued within 12 months of date of birth, full or short form acceptable)
* P45/P60 statement
* Mortgage statement
* Certificate of British nationality
* Asylum Registration Card
* Court summons
* Valid NHS card
* Court Claim Form
* Child benefit book
* Addressed payslip\*
* Mail order catalogue statement\*
* Utility bill (electricity, gas, water, telephone – including mobile phone contract/bill)\*
* Credit card statement\*
* Store card statement\*
* Personal correspondence or a document from a Government Department\*
* Valid insurance certificate\*\*
* Valid TV licence\*\*
* Valid vehicle registration document\*\*
* Bank or Building Society Document\*\*
* British work permit/visa\*\*
* Financial statement e.g. pension, endowment, ISA \*\*

\* documentation must be less than 3 months old at the date it is submitted as evidence

\*\* must be issued within the 12 months preceding the date it is submitted as evidence

Appendix A: Glossary of Terms

***Approved Body*** – a general term to describe those who have been accredited outwith Scotland to produce Energy Performance Certificates (EPC). In Scotland, the legal terminology is an ‘Approved Organisation’.

***Approved Organisation*** – organisations approved by the Scottish Ministers who have a membership trained and qualified to produce energy performance certificates and recommendations reports. This is defined within *The Energy Performance of Building (Scotland) Regulations 2008*, as amended, Regulation 8(1).

***Bacra EPC Assessor*** - accepted by Bacra, a Scottish Government Approved Organisation, to undertake EPC assessments of buildings to a standard compatible with, and operating within, the Government’s Operating Framework.

***Bacra membership*** – membership of the EPC scheme run by Bacra as an Approved Organisation

***Bacra Scheme/the Scheme*** – the scheme for training, registering, assessing and monitoring the practice of EPC Assessors in Scotland managed by Bacra as an Approved Organisation.

***Energy Performance Certificate (EPC)*** – A certificate produced by a member of an Approved Organisation which reflects the asset rating of the building using Government approved software which includes recommendation on how to improve the energy efficiency of the property. In order to be a legal document this must be lodged on the approved Government database (the Scottish EPC Register), in accordance with Regulation 6 of *The Energy Performance of Building (Scotland) Regulations 2008*, as amended.

***Scottish EPC Register*** - the statutory database for the lodgement of EPCs and associated data as well as the list of Approved Organisations and EPC Assessors in Scotland.

***Members/Assessors*** – Member of the Bacra Scheme identified as having the education, training and expertise required to carry out and issue an EPC.

***Operating Framework*** - a document entitled ‘*Operating Framework for Approved Organisations - Energy Performance Certificates - New & Existing Buildings*’ has been set out by the Building Standards Department of the Scottish Government to enable Approved Organisations to “ensure that members are fit and proper persons who are qualified by their education, training and experience to carry out the preparation and issuing of energy performance certificates (EPC)”. The Operating Framework clarifies how this and supporting functions may be achieved.