

Stroma Certification Ltd

Code for Sustainable Homes Qualification Information Pack

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1.0 Introduction

This documentation details the Code for Sustainable Homes (CSH) training and the certification scheme operated by Stroma Certification Ltd. Stroma provides independent, third party assessment of CSH assessors and reports.

This candidate information pack should be read in conjunction with the scheme rules and terms and conditions. All supporting information is available on the Members Section of the Stroma Certification website. They include:

- CSH Scheme Document
- CSH Assessor Monitoring Procedure
- CSH Technical Support Policy
- Escalation Process
- Qualified for Purpose
- Complaints Procedure
- Operational Procedure
- Code of Conduct
- Use of Certification Mark

2.0 Background

The Code for Sustainable Homes is owned by the Communities and Local Government (CLG) and is due to be implemented as a mandatory assessment for all new dwellings in April 2008. Previously the CSH was a voluntary measurement system undertaken by environmentally conscious developers.

In order to undertake an assessment of a site, the candidate must be a member of a licensed certification scheme and be fully trained by a competent body, such as Stroma Certification.

The CSH measures the environmental impact of each dwelling under consideration, using the following distinct categories:

- Energy
- Water
- Materials
- Surface Water run off
- Waste
- Pollution
- Health & Well being
- Management
- Ecology

3.0 Software

Stroma will provide required software tools to produce the reports and supporting calculations. Full specification of the software is available as a separate document, summary of which is listed as follows:

1. CSH Technical Manual.

- a. Document to be used as a reference tool, including a simple search and cross reference facility.

2. Pre-Assessment Report Writer.

- a. The assessor has the option to select the target specification: 1, 2, 3...6 rating, the calculator will assign the minimum mandatory standards required for each section.
- b. A checklist is produced to include all required information to support the credits awarded.
- c. The user may publish this pre-assessment on the Stroma Certification website (free of charge) and can also grant access to their client as a read only viewer to that specific file, enabling design team collaboration whilst data gathering.

3. Design Assessment Report Writer

- a. Produces a standard design assessment CSH report and links to the Stroma website for uploading.
- b. An additional checklist is also printed automatically, that is held on record to be used by the assessor when they visit site for the post construction assessment. The check list includes a list of all the information they need to gather on site (by dwelling type).

4. Post Construction Report Writer

- a. Produces a standard post construction design CSH report and links to the Stroma website for uploading.

5. Assessor Database (to be installed locally by the assessor)

- a. A simple database with interactive file reference (that synchronises with the online Stroma database).
- b. Each assessor has access to individual filed assessments on-line, in addition the use of this application as a local backup as well as a file storage system for all electronically filed information.

6. A Suite of Calculator Tools (required to undertake the assessments).

- a. The tools available to assist with the assessment, are as follows:
 - i. Energy section:
 - A heat loss parameter tool.
 - A percentage improvement tool.
 - A percentage tool for lighting.
 - A carbon emission percentage tool.
 - ii. Water:
 - A water consumption calculation tool.
 - A recycled water tool.
 - iii. Materials:
 - Environmental impact tool.
 - Basic building elements tool.
 - Finishing elements tool.
 - iv. Pollution:
 - NOx calculation tool.
 - v. Health and well Being:
 - Daylight calculation tool.
 - Acoustic test estimation tool.
 - vi. Management:
 - Fuel consumption calculator(s).
 - vii. Ecology:
 - 3 Ecological valuation tools (before, after and the difference).
 - Footprint ratio calculator.

7. The Green Guide

8. The Training Manual

9. Instruction Manual

10. Copies of all required forms such as site registration, etc.

4.0 Training

The Stroma training program for code assessors is approved by CLG; in order to gain entry to the certification scheme the candidate must have achieved a pass from an accredited examination.

Stroma currently offers the following options for training that are similar in structure:

| Assessor Training Course | Designer Awareness Course |
|--|---|
| <p>Step 1: Receive the Technical Support Information CD ROM including:</p> <ul style="list-style-type: none"> • Home Study incorporating 9 Task Sheets • Green Guide • A full set of the calculation tools • Worked examples <p>Whilst the Task sheets are a 'non mandatory' item we recommend that all candidates intending to undertake CSH assessments should fully complete the task sheets and return them to Stroma, as they form an essential part of your learning experience. Your tutor will provide feedback and guidance on the task sheets.</p> | <p>Step 1: Receive the Technical Support Information CD ROM including:</p> <ul style="list-style-type: none"> • Green Guide information • A full set of the calculation tools • Worked examples <p>The CD ROM material also includes a comprehensive set of all the calculation tools required to undertake assessments, along with worked examples and instructions.</p> <p>No home study is required or recommended for this course.</p> |
| <p>Step 2: Attendance of the 3 day training session.</p> <p>Days 1 and 2 include theory and practical workshops on the CSH Technical manual.</p> <p>Day includes a 3 hour exam and a "Post Construction Review" workshop</p> | <p>Step 2: Attendance of the 2 day training session.</p> <p>Days 1 and 2 include theory and practical workshops on the CSH Technical manual.</p> |
| <p>Step 3: Attendance of a post examination review (non mandatory) to facilitate a feedback session and instigate an improvement plan for future CPD if required / recommended.</p> | <p>If you attend the Design and Awareness Course and you decided to take the Code examination you will be charged £300.</p> |
| <p>Receive a copy of all training handout materials and suggested further reading along with the "Code for Sustainable Homes Software Tool", as detailed above.</p> <p>This tool compiles reports for assessment purposes, prescribing the mandatory and tradable credits for each section of the code assessment along with all supporting information.</p> | |
| Cost: £995* | Cost: £695 |

* The first examination re sit is free of charge, with any subsequent examinations being charged at £225+VAT.

These 2 courses are currently available at the locations and venues as detailed on our website or for more up to date information please telephone **0845 621 1111** or email **cs@stroma.com**.

5.0 Applications to the CSH Certification Scheme

Having completed the training (as detailed above) Stroma assesses your examination result and provides feedback with one of the following outcomes:

1. Successfully Passed,
 - Recommend for scheme membership.
2. Borderline Pass,
 - Recommend for certification with a suggested improvement action (i.e. re-visit a task(s) sheet or CPD attendance).
3. Borderline Fail,
 - Recommend for certification with a mandatory improvement action (i.e. re-visit a task sheet(s) and demonstrate to Stroma the completed work or CPD attendance).
4. Fail,
 - Candidate not recommended for scheme membership, will be advised to consider retraining or to re take the examination.

Having successfully joined the certification scheme you are granted a licence to undertake Code assessments. Your initial report (lodged at both Design and Post Construction stage) will be audited for consistency, with feedback provided.

5.1 Fees

| Item | Fee |
|---|--|
| Annual Scheme Membership | £345 |
| Technical Support including: Phone support on CSH Monthly Technical bulletins (by email). Software updates Updates to all templates, forms etc. | Free of charge (to scheme members only) |
| Lodgement of certification. <i>For sites containing 300 or more dwellings, lodgement of certification fee is £30 per dwelling.</i> | £35 per dwelling (min site fee: £145) |

5.2 Certification and Listing

Certificates and licences are awarded to Companies that the individual assessors represent. All certificates, reports and licences contain the name and address of the Assessor Company, their company logo, a unique reference number and the issue number and date along with all other relevant property details.

Each licensed assessor shall be presented with a membership card which details their certification. The licence provided to the Company will schedule each individual assessor within the assessor organisation.

All licensed assessors shall be listed equally on the Stroma Certification Members Website. Stroma undertakes marketing activity to represent all scheme members, such as attendance of trade shows, website advertisement etc.

5.3 Audit Process/ Continual Assessment

Certification shall be maintained through the continual registration to the CSH certification scheme, and satisfactory review of CSH reports.

There are 4 types of Quality Assurance (QA) surveillance requirements that shall be maintained:

- Basic Administration Audit (BAA):
 - A BAA is carried out on all assessment reports to ensure all details pertaining to the dwelling and assessment that are required to issue a certificate are correct.
- Full Credit Audit (FCA):
 - A FCA is undertaken on a minimum of 10% of all reports submitted for each assessor.
 - To ensure that the credit justifications are correct and fulfil the credit criteria and that appropriate supporting evidence is correctly referenced.
- A Full Technical Review (FTR)
 - A minimum of 2% of reports will undergo a FTR.
 - In order to complete a FTR the assessor shall provide the full set of supporting information gathered and referenced within the CSH report. Stroma will independently re-work the entire assessment process to ensure consistency.
 - This FTR may be incorporated into either a Site Attendance Audit (SAA) or an Organisational Audit (OA).
- An Organisational Audit (OA):
 - The OA encompasses an office visit to the licensed assessor organisation it will review the assessor's performance.
- Site Attendance Audit (SAA)
 - A SAA shall be organised for the initial report undertaken as part of the initial entry process to the certification scheme. 1% of all ongoing Post Construction reviews shall include attendance of Stroma Certification staff for the purpose of SAA's.

An appropriate QA audit schedule is generated on a random basis for each individual assessor, from the Stroma Certification database. The results of all audits will be held on this database, and may be made available to CLG.

All assessors will be subjected to the rejection process policy, which is freely available to all scheme members, and details the individual requirements of each assessor.

6.0 Complaints & Appeals

Stroma Certification operate a transparent Complaints and Appeals procedure, which is detailed within the Complaints Procedure Policy, all complaints are overseen by an independent Governing Body that represent industry stakeholders.

All complaints will be resolved without charge to the scheme member.