Procedures for Monitoring
Retrofit Assessors and Coordinators

1.0 Monitoring Requirements

As part of an ongoing process of Quality Assurance Sterling Accreditation monitors individual assessors in the following areas:

1. Assessments/Projects completed each month and quarter; identification of high numbers lodged in any period.
2. Use of Sterling's helpdesk each month and quarter; identification of high numbers of queries in any period.
3. Audits completed each month and quarter; identification of trends where a number of members are failing audits for similar reasons.
4. Complaints, Client feedback and Customer Surveys; identification of trends where a member receives negative feedback
5. Review of CPD at annual membership renewal. Retrofit Assessors are required to complete 10 hours of additional CPD to the 10 hours required as a Domestic Energy Assessor. Retrofit Coordinators are required to complete 25 hours CPD. Where an individual is both an assessor and a coordinator both annual requirements (35 hours total) must be evidenced.

These monitoring procedures allow Sterling Accreditation to identify areas where additional learning or guidance could be provided

Each Assessor/Coordinator is required to keep records of their inspections for their own QA purposes, regardless of the Sterling Accreditation monitoring process, for a period of at least 15 years.

The core standard required is defined as: it must be possible for an independent Retrofit Assessor/Coordinator to generate a consistent assessment report with a similar outcome/result using this evidence in line with the following minimum Quality Standard.

2.0 Scope of Monitoring

2.1 Retrofit Assessment/Coordinator Report Sampling – Members shall be subject to a minimum of 2% of projects per calendar year. The Scheme will audit a minimum of 3% of Retrofit projects per calendar year.

2.2 Helpdesk – Each individual member will be monitored in relation to the number of instances they require assistance in relation to the production of reports.

2.3 Audit Review – A percentage of failed audits will be reviewed to determine if the wider group of scheme members are lacking in specific areas of knowledge.

2.4 Customer Surveys – Completed Customer surveys will be reviewed monthly to determine any areas where customer feedback has been entered as less than 'satisfactory'.

2.5   CPD Review – All members will be subjected to validation of CPD at annual membership renewal. Where structured learning has been undertaken this should be evidenced with the inclusion of attendance certificates. Failure to complete sufficient evidence could result in disciplinary actions.