

Practical Retrofit Coordination and Lodgement

GQA Ref	PRC1	Regulatory Ref	R/651/6386	Level	3	Credit Value	3	GLH	15
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Aims

This unit is about applying the practical knowledge and skills necessary to coordinate, document, and lodge domestic retrofit projects in accordance with PAS 2035 and TrustMark requirements.

Assessment Guidance

This unit will be assessed through the learner producing a workbook demonstrating an overall awareness of the subject.

Assessors for this unit must have verifiable, current industry experience and a sufficient depth of relevant occupational expertise and knowledge.

Learning outcome; The learner will:	Assessment criteria: The learner can:	Evidence Ref No.		
		1	2	3
1. Understand the key stages in the PAS 2035 retrofit process	1.1 List and describe each stage in the PAS 2035 process from assessment through to post-retrofit evaluation			
2. Understand the role of the Retrofit Coordinator in managing project compliance	2.1 Identify key responsibilities of a Retrofit Coordinator, including engagement with stakeholders and ensuring compliance			
3. Understand the documentation required for TrustMark lodgement	3.1 List and describe the mandatory documents required under PAS 2035 for TrustMark lodgement			
4. Know how to compile and collate evidence for project files	4.1 Describe how to compile a compliant retrofit evidence pack including risk assessments, assessment reports, and design documentation			
5. Understand the TrustMark Data Warehouse and its function	5.1 Explain the purpose of the TrustMark Data Warehouse and how information is uploaded and accessed			
6. Know how to manage supply chains and professional roles in retrofit	6.1 List professional roles in a PAS 2035-compliant project and describe how to coordinate with them effectively			
7. Know how to interpret a Medium-Term Improvement Plan (MTIP)	7.1 Describe the components of a MTIP and how it informs long-term retrofit decision-making			
8. Know how to monitor and evaluate retrofit outcomes	8.1 Describe the different levels of monitoring and evaluation under PAS 2035 and when each is applicable			
9. Know how to identify and avoid common pitfalls in project coordination	9.1 List common project issues and errors in documentation that may delay or invalidate lodgement			
10. Be able to prepare a retrofit project for successful TrustMark lodgement	10.1. Outline the final steps to prepare and lodge a project using a software platform, including quality checking			
11. Understand how to carry out stock analysis to support retrofit planning	11.1 Describe how to interpret a Retrofit Assessment and model appropriate measures for the property, considering technical and behavioural factors			

12. Know how to engage with Retrofit Designers and validate Retrofit Designs	12.1 Identify the key components of a Retrofit Design and explain how to assess them for technical accuracy, feasibility, and compliance with PAS 2035			
13. Understand the available retrofit software tools and their uses	13.1 List commonly used software tools in domestic retrofit, and compare their features, strengths, and limitations			
14. Understand how to maintain project integrity and impartiality under stakeholder pressure	14.1 Describe common types of pressure faced by Retrofit Coordinators from delivery partners, clients, and funders.			
	14.2 Explain how to apply PAS 2035 principles to resist inappropriate influence and maintain project integrity			
	14.3 Describe techniques for effective and professional communication when managing conflicts of interest			
15. Understand the audit process and how to maintain compliance in retrofit projects	15.1 Describe the purpose and scope of audits carried out by TrustMark and other relevant bodies			
	15.2 Explain how to prepare a retrofit project for audit, including documentation and evidence collation			
	15.3 Describe how to respond to audit outcomes and take corrective action in cases of noncompliance.			
	15.4 Identify common audit failures and how to prevent them through good coordination practice			

Assessor Comments/Feedback