



**TRUSTMARK**  
Government Endorsed Quality

## Developing Quality Services

## History

TrustMark has stood at the intersection of trade and consumer protection since 2005. In 2016, the industry led, Government commissioned Each Home Counts (EHC) review identified the need for an all-encompassing mark of quality that consumers can recognise and trust. TrustMark has expanded its remit to become the **Government Endorsed Quality Scheme**

## EHC / Trustmark – areas of combination

**Consumer Protection** – Code of Conduct, Consumer Charter, Redress process

**Advice and Guidance** – Impartial information, range of supporting tools, ESAS

**Data Warehouse** and a range of services and tools to support it

**Compliance and Enforcement** – lessons learnt and how to drive a revised delivery

**EHC Quality Mark** – scope and the areas of delivery

**Quality and Standards** – support the delivery of the technical standards for the sectors

## Scope

Now expanded as the 'quality mark' for the Retro-Fit, Repair, Maintenance and Improvement (RMI) and Energy Efficiency sectors

## Delivery

- Board Councils and Committees
- The Framework Operating Requirements
- The Code of Conduct
- The Customer Charter



## ECO

- Adoption of TrustMark early in 2019
- Underpinned by transitioned implementation of PAS 2035 & PAS 2030:2019
- Transition being agreed of the requirements

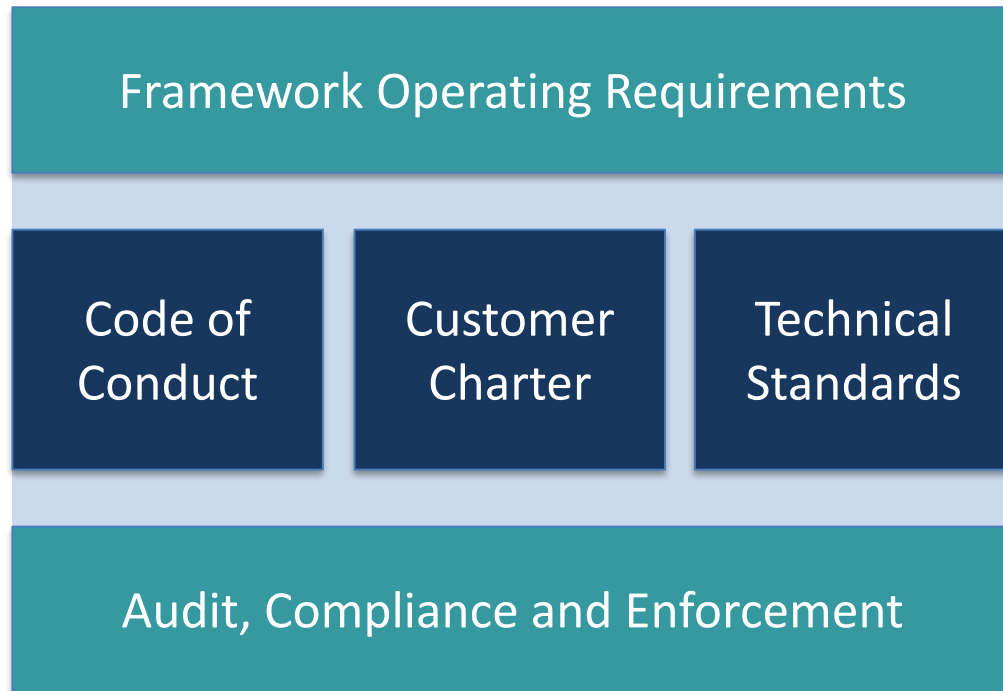
## Compliance and Enforcement

- Risk based audits of Scheme Providers
- Witnessed on-site inspections of Businesses
- Planned transfer of ECO Technical Monitoring to TrustMark
- Risk based and random monitoring sanctions
- Embedded Trading Standards Officers and enforcement process

## Opportunities:

- Improved quality assurance through steady increase in standards and build professionalism in the sectors
- Development of appropriate warranties to protect the consumer
- Build consumer and business confidence relating to all services and products used under the quality brand leading to a stronger, more stable environment that generates confidence to invest in new and existing products, services and processes
- Provision of the Data-Warehouse, supporting audit, compliance, enforcement and reduced risk
- Encourage investment through for all sectors (Able to Pay, ECO, Private funding) (circa 4.9B)

## TrustMark Framework and Code of Conduct



Framework – the engine of the quality mark that determines how the Scheme Providers register the businesses.

Code of Conduct – sets out the expectations and requirements between the business and the Scheme Provider, the consumer and the legislation applicable.

Customer Charter – what the customer should expect when engaging with the business.

Technical Standards that are applicable to that sector.

## Strengthening the TrustMark scheme

The EHC consultation process had one commonality – how do you create a scheme ‘with teeth’?

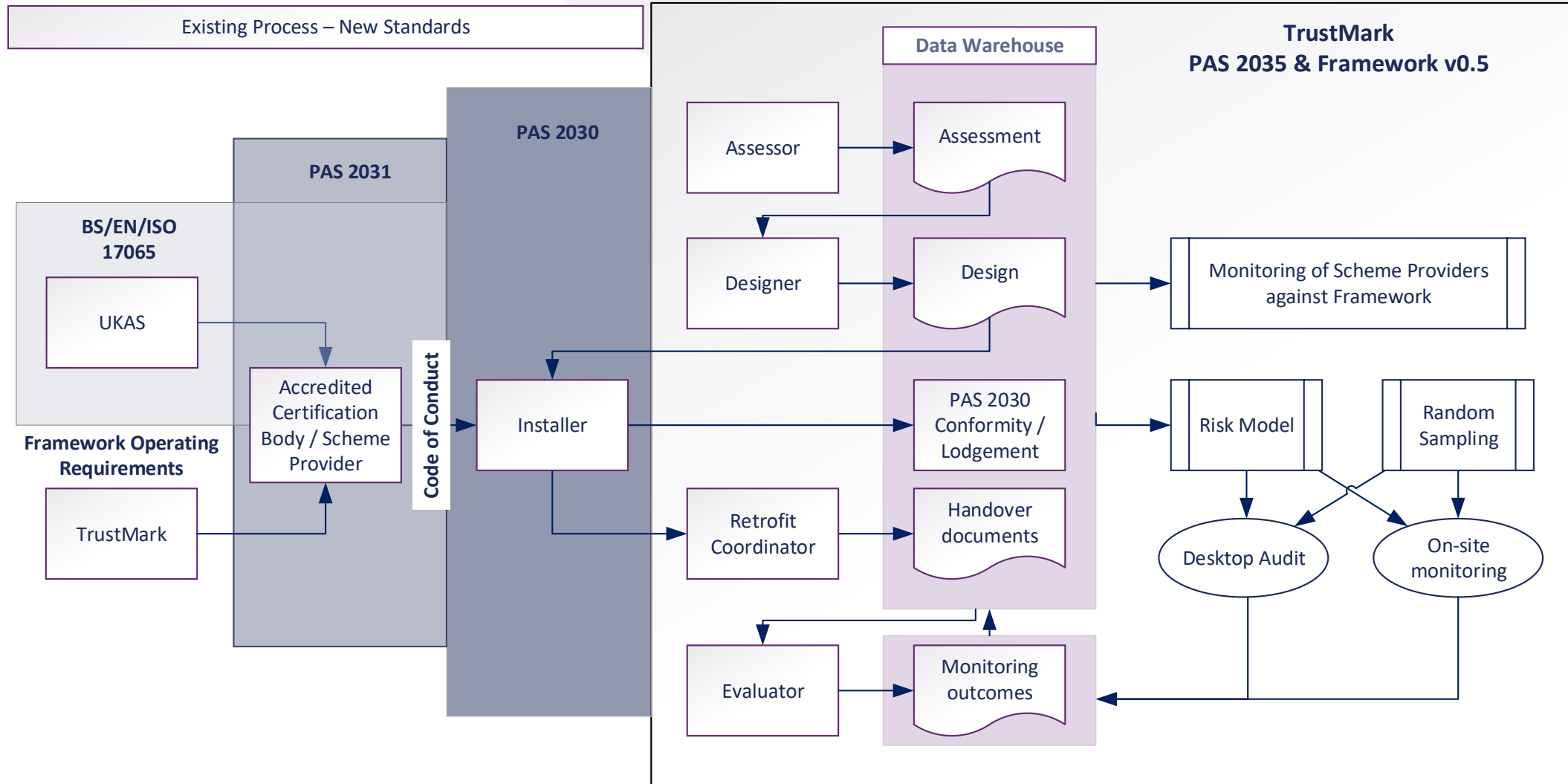
To support the Scheme Providers, Registered Businesses and consumers, TrustMark will be the first scheme to embed Trading Standards Officers within its organisation

## Trading Standards support

- Incidents of mis-selling
- Brand misuse/cease & desist letters
- Misleading or restrictive contracts & advertising
- Sale & installation of goods not fit-for-purpose
- Services not provided with reasonable skill & care



Balanced Enforcement



## Some Key Areas Supporting Implementation:

- The PAS does NOT apply to ‘like for like’ replacement, maintenance/repair of an existing dwelling or system installed in it (stipulations apply)
- Reduced risk pathway for non protected ‘Traditional Construction’
- Risk grade ‘A’ (low risk projects) SINGLE proprietary measures – proportionate approach to Retrofit Designers credentials
- RPEL routes are recognized for some of the Retrofit Professionals working some risk pathway subsets

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### Publicly Available Specification

**PAS 2035: 2019**

## **Retrofitting Dwellings for Improved Energy Efficiency: Specification and Guidance**

*Third Draft Version 2, 20 January 2019*

*[Placeholders and the Technical Author's comments and questions are shown in red italics]*

*This document presents an updated third draft of PAS 2035: 2019 following the Steering Group's fourth meeting in December 2018.*

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## Current Situation:

- PAS 2030:2019 Draft 3 Version 3 formally identifies PAS 2035 and the integration with that standard
- TrustMark is referenced in the current PAS 2030 'Fig 1 EEM Installation and Validation System – Overview'
- ISO IEC 17024 – personal certificate of competence recognised
- PAS 2031 is at first draft but is not yet aligned with the current PAS 2030
- Both these standards and their steering groups were postponed due the delay in 2035 steering group meetings and have still to meet

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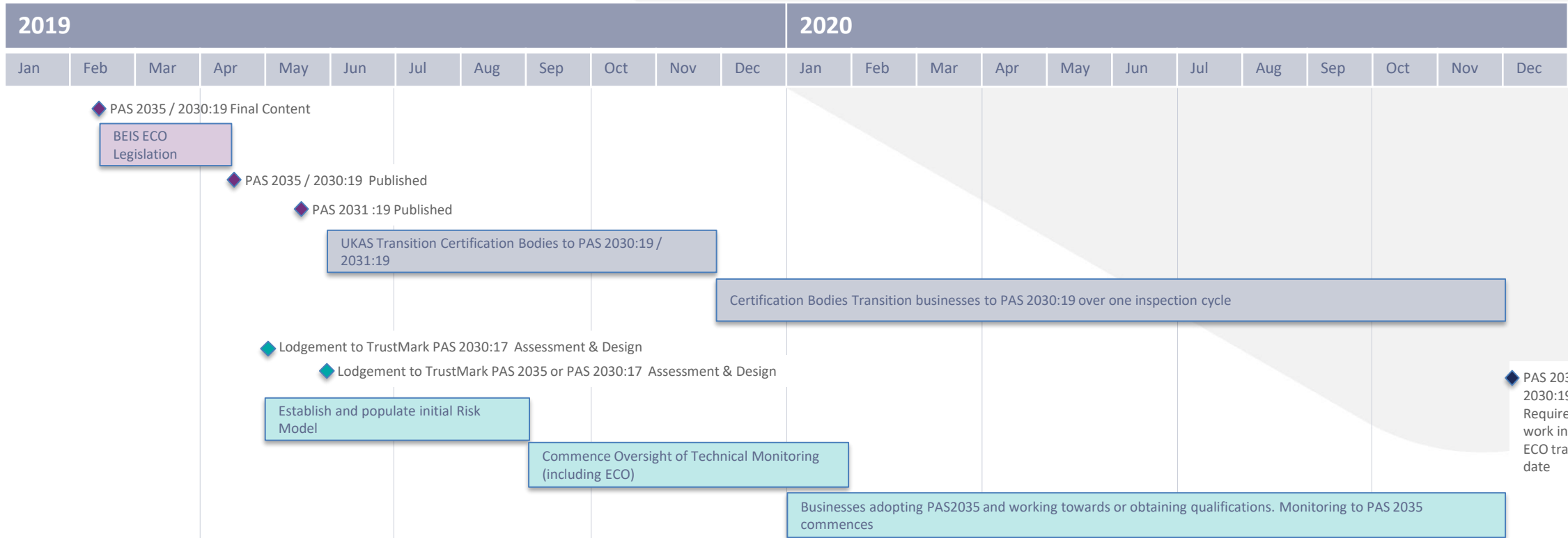
Publicly Available Specification

PAS 2030:2019

**Specification for the installation of energy efficiency measures (EEM) in existing dwellings and insulation in residential park homes**

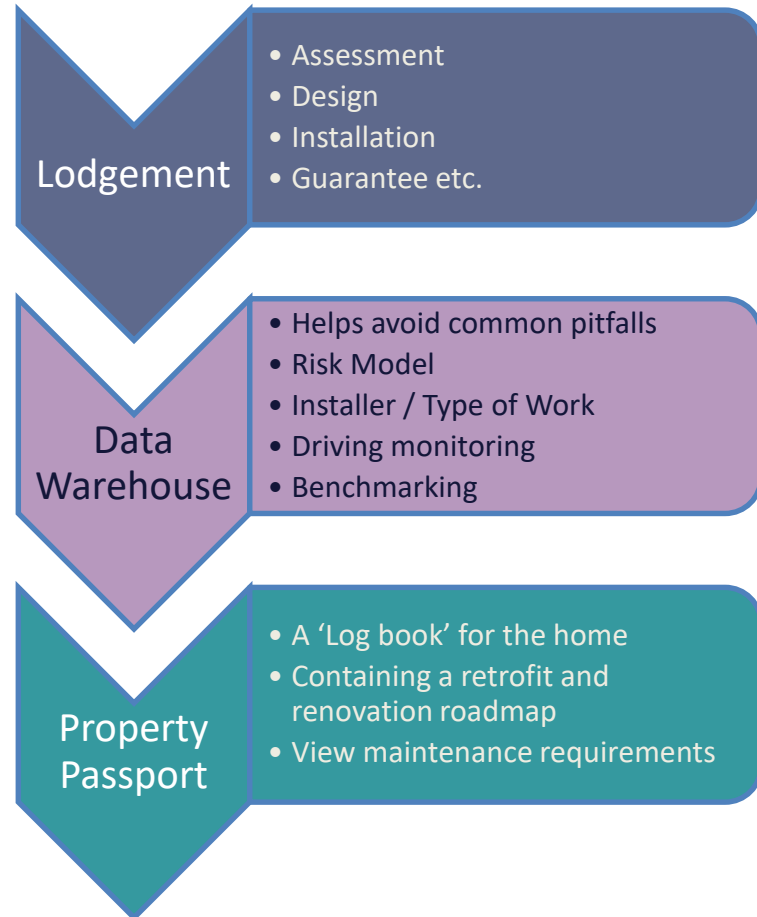
*Draft 3 Version 3, 11 January 2019*

*Placeholders and the Technical Author's comments and questions are shown in red italics.*



High level overview of principles of transition as agreed on 23 Oct 18 BEIS, BSI, TrustMark , UKAS. exact dates TBC.

- ◆ BSI
- BEIS
- UKAS
- TrustMark



**Foundations of Security & Data Protection**

## Lodgments

- Beta April 2019
- Populates Data Warehouse and Risk Model

## Data Warehouse

- Helps get installation right 1<sup>st</sup> time through combining knowledge
- Underpins compliance and enforcement across Schemes
- Reduces risks from Phoenix Companies
- Provides industry insights and continual feedback

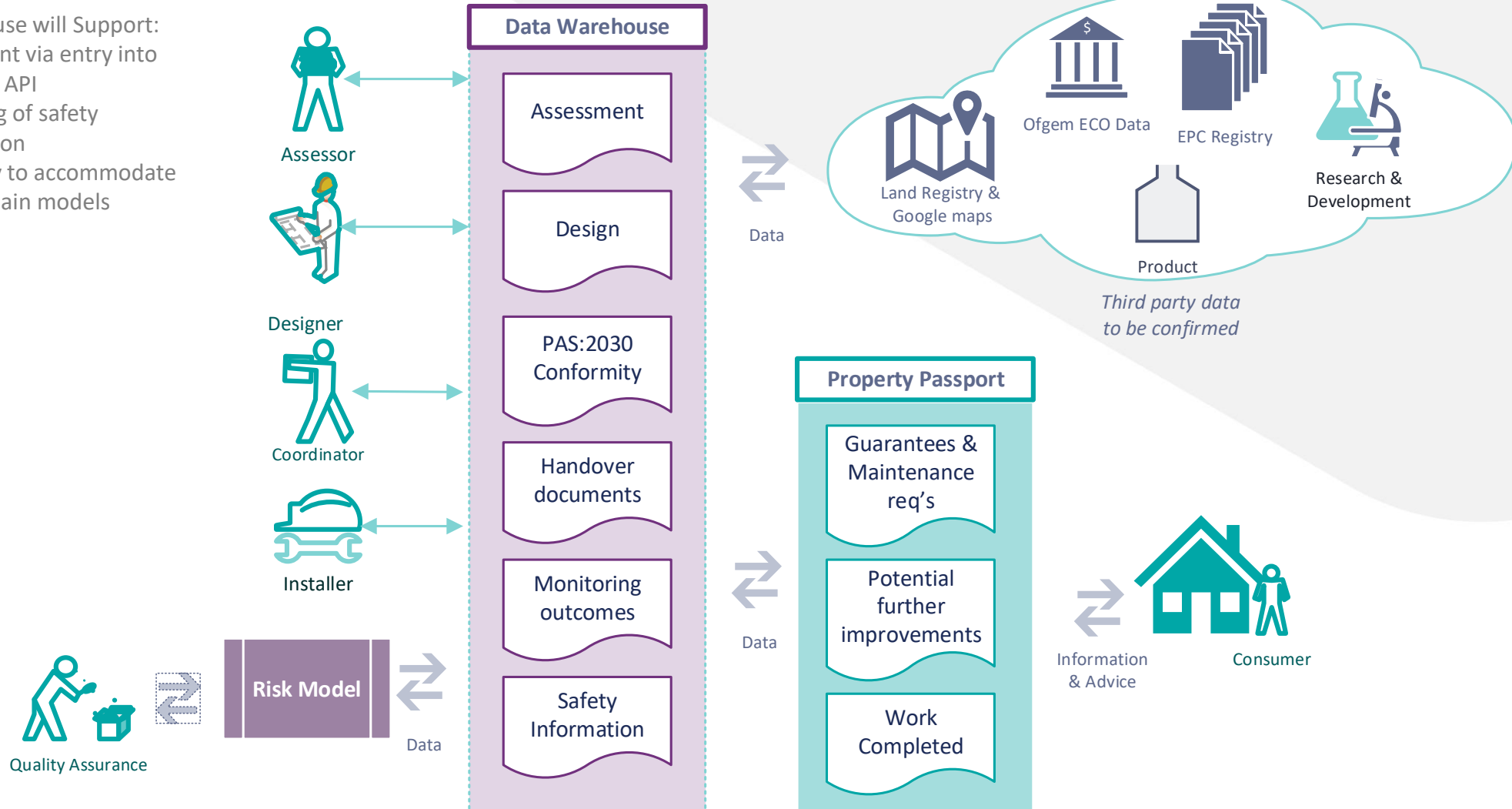
## Property Passport

- Beta September 2019
- Contains routes to advice and finance
- Exploring use for residential and commercial property
- Repository to find information about a property and guarantees etc.

# Data Warehouse Overview

Data Warehouse will Support:

- Lodgement via entry into form and API
- Recording of safety information
- Flexibility to accommodate supply chain models



## Principles

- Ensure the delivery of quality work in homes irrespective of the funding route
- Do not impede the existing ECO supply chain
- Develop to an efficient and targeted monitoring regime
- Build upon existing good practice
- Technical Monitoring funded through Lodgment of work

## Discussion Points

- Data sharing will it be possible to share pre install, results of Tech Monitoring, what's reported to Ofgem ?
- Technical Monitoring Contracts – will it be possible to novate to TrustMark or do we need to onboard as contracts lapse?





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