



**Title:** Lead Assessor Application Form  
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**Issued By:** Sarah Rigby      **Date:** 07/12/2021  
**Approved By:** Catherine Garrido      **Date:** 07/12/2021

**Revision History**

<b>Issue</b>	<b>Issued</b>	<b>Approved</b>	<b>Reviewed</b>
1.0	27/11/2014	27/11/2014	
1.1	14/01/2015	20/02/2015	
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1.2	07/11/2017	10/12/2017	13/01/2020 10/06/2021
1.3	07/12/2021	07/12/2021	



# ESOS Lead Assessor Application Form

Please complete all sections of this form to begin your application to join the ESOSRegister as an ESOS Lead Assessor. You are not required to provide any supporting documentation to support this form at this stage, the team will be in touch with you once you have submitted your completed application form with details on the further documents we will require and how to provide them to us.

This application form is divided into 5 sections or steps. Please ensure you complete all sections of the form as fully as possible, you are welcome to expand each text box to fit your answers in full or use an additional document with each of your answers if you are unable to edit the form. If you would like to be given access to a Word version of this form please let the team know at [info@esosregister.com](mailto:info@esosregister.com) and they will happy to provide you with one.

**Once complete, please provide a copy of this form to the team via either the Qidos File Uploader which can be found here: <https://www.secure.argylesoftware.co.uk/> or an alternative method of secure file transfer such as [We Transfer](#). We are unable to accept any documents sent via email.**

## Step 1 of 5 - Business Details

Forename(s) (required)

Middle name(s)

Surname (required)

Are you currently accredited with Qidos? (required)

- Yes  
 No

Full Legal name of Business (required)

Personal Address Line 1 (required)



Personal Address Line 2

Personal Address Line 3

Town (required)

County

Postcode (required)

Email address (required)

Telephone Number (required)

## Step 2 of 5 – Types of Qualifications Held

Please tick all that apply from the list below:

- L3 Non-Domestic Energy Assessor
- L4 Non-Domestic Energy Assessor
- L5 Non-Domestic Energy Assessor
- Public Building Energy Assessor
- Non Domestic Green Deal Accreditation

We will require colour copies of all relevant qualification certificates so please ensure you have these to hand to support your application and are able to provide them when requested.

Please confirm that in addition to the above you have also passed an ESOS Lead Assessor training course and have documentary proof of this:



- Yes
- No

### Step 3 of 5 - Professional Conduct

1) Have you had any complaints, claims, or allegations of breach of professional duty notified in the last 5 years, or do you have any outstanding complaints or claims currently unresolved?

- Yes
- No

If you have answered "Yes" to the above question, please provide details in the box below:

2) Have you ever been convicted of any crime in the UK, or anywhere else?

- Yes
- No

*If you have answered "Yes" to the above question please be prepared that we will ask you for more details upon receipt of your DBS check.*

3) Have you had any application to join any other certification scheme, professional or regulatory body, trade association or any similar organization declined at any time for any reason?

- Yes
- No

If you have answered "Yes" to the above question, please provide details in the box below:

4) Have you had any suspension or withdrawal of membership by or from any other certification scheme, professional or regulatory body, trade association or any similar organization at any time?

- Yes
- No



If you have answered "Yes" to the above question, please provide details in the box below:

5) Have you ever been unable to obtain indemnity insurance or had any special conditions or premiums been applied to such a policy?

- Yes
- No

If you have answered "Yes" to the above question, please provide details in the box below:

6) Have you ever had any bankruptcy order, CCJs or proceedings against you?

- Yes
- No

If you have answered "Yes" to the above question, please provide details in the box below:

7) Have you ever had any individual voluntary agreement with or for the benefit of your creditors?

- Yes
- No



If you have answered “Yes” to the above question, please provide details in the box below:

8) Have you ever been disqualified as a director?

- Yes
- No

If you have answered “Yes” to the above question, please provide details in the box below:

### Step 4 of 5 - Lead Assessor Core Competencies

Please provide a statement with an example against each of the core competencies of a Lead Assessor outlined in PAS 51215. Each statement should clearly illustrate how the outcome of your qualifications, lifelong learning and experience has equipped you to meet the core competency.

A1: Understanding the operational context of an organisation being assessed.



A2: Familiarity with, and ability to apply, the requirements of energy efficiency assessment methods.

A3: Scoping an energy efficiency assessment, as applicable to the organisation being assessed



A4: Understanding, in detail, of energy use and energy systems applicable to the organisation being assessed; (buildings, industrial, transport)

A large, empty rectangular box with a thin black border, intended for providing a detailed understanding of energy use and systems for buildings, industrial, or transport.

A5: Managing energy efficiency assessment teams and budgets, and managing working relationships

A large, empty rectangular box with a thin black border, intended for describing the management of energy efficiency assessment teams, budgets, and working relationships.





A6: Understanding the techniques of measuring, sampling, sub-metering, and establishing an energy balance

A large, empty rectangular box with a thin black border, intended for notes or answers related to section A6.

A7: Understanding the techniques of measuring, sampling, sub-metering, and establishing an energy balance

A large, empty rectangular box with a thin black border, intended for notes or answers related to section A7.



A8: Identification, quantification, ranking and prioritisation of opportunities for improvement

A large, empty rectangular box with a thin black border, intended for content related to A8.

A9: Managing working relationships

A large, empty rectangular box with a thin black border, intended for content related to A9.



A10: Preparing and presenting a technical and non-technical report for an energy efficiency assessment.





Please comment in the box below on how your technical knowledge and skills relate to the following:

- Understanding, and application, of: material and energy balance, fluid flow, heat transfer, transport systems, electrical systems
- Measuring, sampling, sub metering and interpreting results
- Understanding the role of operating procedures and their impact on energy performance
- Conceptual design, technical and economic evaluation
- Project planning and deployment
- Understanding the importance of maintenance



***Thank you for taking the time to complete this form in full. Please send this to our team using the instructions at the start of the form.***

## Step 5 of 5 - Evidence Submission

The following documents will be required to support your application to join ESOSRegister.com. An email will be sent to you upon submission of this form which outlines how to provide these documents, **please do not send them via email.**

- Details of any previous convictions
- Full CPD record, objectives and supporting evidence from the last 12 months (minimum of 20 hours, please see attached CPD Guidelines)
- At least 3 CPD objectives for the coming year (please see attached CPD Objective Guidelines)
- Copy of all qualification certificate(s)
- Copy of a basic DBS check, dated within the last 12 months
- Colour copy of passport
- Colour copy of driving licence
- Copy of your Complaints Procedure
- Copy of your current PII insurance certificate
- Evidence that you attended a Lead Assessor Training Course (min. 2 days)
- Evidence that you passed a time limited multiple choice exam (based on the PAS 51215:2014 requirements)
- Copies of all Lead Assessor exam transcripts
- Written confirmation of the training provider you received your Lead Assessor training through
- Evidence that you have a “minimum length of two years of professional energy assessment and energy audit experience relevant to the PAS 51215 within a commercial or industrial setting”
- Copy of your CV
- A personal statement to prove that you have relevant experience in managing teams and company budgets
- Two written references supporting your relevant energy audit experience, professionalism and ability to work with people and manage teams
- Contact details for the two referees providing you with a reference to support your application.

**Please note that all documents must be uploaded using the Qidos File Uploader which can be found here: <https://www.secure.argylesoftware.co.uk/> .**

**We are unable to accept any documents sent via email.**

For your ESOSRegister registration there will be **£495 excluding VAT**, application fee. Please note that subsequent membership is priced at **£250+VAT each year.**