

Defining the role of the Sustainability Champion

– Proposals and Follow up Consultation

Introduction

In 2014 the role of Sustainability Champion was introduced into the UK building level schemes as part of BREEAM's ongoing drive to encourage greater sustainability in the built environment and to support achievement of the maximum benefits from the BREEAM process on the projects that they are engaged in. Its purpose was to ensure that design teams, specifiers and other key stakeholders were able to call on and be guided by 'scheme related' expertise as a part of the decision making process for the project; and therefore maximise a building's performance and achieve the target certified rating in the most cost-effective, solutions-orientated way.

Within the following BREEAM Schemes credits are available to projects that use a 'Sustainability Champion':

- BREEAM UK Domestic Refurbishment
- BREEAM International Non Domestic New Construction
- BREEAM UK Non Domestic New Construction
- BREEAM International Non Domestic Refurbishment and Fit Out
- BREEAM UK Non Domestic Refurbishment and Fit Out

Note: The following new BREEAM family schemes are currently in development or in live Beta phase:

- BREEAM Infrastructure
- Home Quality Mark

These schemes include reference to or criteria related to the BREEAM Sustainability Champion but are not within the scope of this consultation although any related feedback on the use of this role within these schemes would be welcome. These schemes are either currently undergoing ongoing consultations/engagement activities covering related issues (in the case of infrastructure) or (in the case of HQM) are in a live Beta phase of release. The outputs of this consultation will be considered as part of the finalised version of both these schemes.

Clarification and Refinement of the BREEAM Sustainability Champion role

Given the potential for positive benefits that a BREEAM Sustainability Champion can bring through supporting the smooth and efficient delivery of the BREEAM process and more widely in achieving sustainable objectives, we are assessing the competency requirements for this role with a view to enhancing and clarifying the benefits achieved as a result of their involvement.

As part of the first stage of this work BRE Global ran a consultation in 2015 seeking feedback on experiences of the current AP role, as well as views on the proposed AP competency requirements as set out at that stage. The feedback received formed the basis of stage 2 of this work which resulted in the following:

- A general review of the membership schemes currently approved by BRE Global (whose members are currently deemed Sustainability Champions)
- Review and update the Sustainability Champion competency requirements
- Review and refinement of the routes available to becoming a BREEAM Sustainability Champion
- Clarification of the qualifications available to meet the requirements of the Sustainability Champion role
- Additional routes to meeting the requirements of the Sustainability Champion role
- An overview of the process and requirements for organisations wishing to become a recognised BREEAM Sustainability Champion training providers
- A table highlighting the differences and benefits of the formal BRE recognised BREEAM roles in the assessment process.

In response to feedback received, Appendix A in this document summarises and clarifies the key differences between and value of the three roles associated in the BREEAM process:

- BREEAM Assessor
- BREEAM AP
- BREEAM Associate

Defining the role of the Sustainability Champion – Proposals and Follow up Consultation

BREEAM Sustainability Champion – current and proposed recognised qualifications

BREEAM Sustainability Champion is a generic title which currently encompasses a number of potential routes to BREEAM recognition for professionals. These cover those who are trained and qualified to provide BREEAM related sustainability advice to project teams in order to facilitate timely and successful target setting, scheduling, prioritisation and monitoring of performance relating to the design and construction of projects. The changes set out in this document propose that:

The following qualifications / membership schemes are currently approved/recognised under the umbrella of the BREEAM Sustainability Champion:

1. BREEAM Accredited Professional
2. BRE Site Sustainability Manager (SSM)

Following feedback received from the marketplace in relation to the BREEAM Sustainability Champion role and its relationship to the qualification currently recognised, a part of this work was to review and where necessary clarify and refine this role. As a result we propose the following:

- The BREEAM Sustainability Champion title and other associated titles such as BREEAM Accredited Professional and Site Sustainability Manager be phased out and replaced with a single overarching title BREEAM Advisory Professional (AP)
- Have one generic qualification – BREEAM Advisory Professional - which indicates the specific advisory focus specific to construction stage e.g.:
 - BREEAM Advisory Professional – Design
 - BREEAM Advisory Professional – Site
- The BREEAM Advisory Professional qualification (Design or Site) is achieved following the successful demonstration of the BREEAM Advisory Professional competency criteria (see Table 1)
- That there are additional routes to meeting the requirements of the BREEAM Advisory Professional qualification.

All current BREEAM Accredited Professionals will automatically be qualified as BREEAM Advisory Professionals and will be able to carry out their work under the title of 'BREEAM Advisory Professional Design and Site' under the new scheme. Existing SSMs, likewise, will automatically be qualified as BREEAM Advisory Professionals and will be able to continue to carry out their work under the title of 'BREEAM AP Site'. All BREEAM Advisory Professional (design and/or site) will additionally be required to maintain CPD to continue to work in these respective areas. Newly qualified BREEAM Advisory Professionals who qualify following the implementation of this new qualification will have their area of expertise recognised by being 'BREEAM Advisory Professional – Design' / 'BREEAM AP – Site'.

From here onward in this document we will refer to the BREEAM Advisory Professional role rather than the BREEAM Sustainability Champion role. BREEAM AP will now be used as an acronym for "Advisory Professional" rather than the previous qualification of "Accredited Professional".

Defining the role of the Sustainability Champion – Proposals and Follow up Consultation

The Role of the BREEAM Advisory Professional

The role of the BREEAM AP is to contribute their detailed experience, knowledge and advice into the design/project team to facilitate:

- Timely and successful BREEAM scheme related target setting.
- Scheduling, prioritisation and monitoring of performance and non-compliance risk.
- Achievement of a certified BREEAM rating.

They will provide value to the project by:

1. Facilitating the cross-project consideration and prioritisation of assessment issues through and relevant to the project given the desired client outcome(s).
2. Provide support and assistance to the client, design and construction teams in identifying and exploring options for achieving the desired sustainability and scheme-related outcomes; seeking solutions that are cost effective, value-added and relevant to the project's circumstances and end-use.
3. Provide support and assistance on the processes to smooth information gathering and communications with the assessor from within the delivery team.
4. Collaborate with the project's appointed licensed assessor and assist in the preparation and collation of project information and outputs for submission to them for the formal assessment and certification application.

Becoming a BREEAM Advisory Professional

The following diagram outlines the process for becoming recognised by BREEAM as a BREEAM AP.

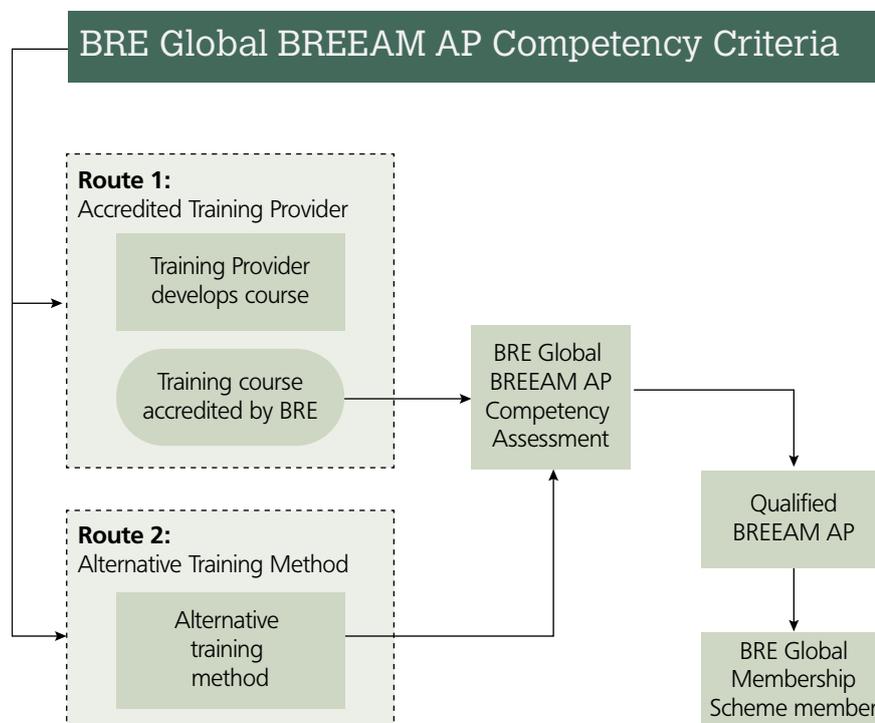


Figure 1: The process for becoming a BREEAM Advisory Professional

Defining the role of the Sustainability Champion – Proposals and Follow up Consultation

Term descriptions	
<p>Training Provider</p> <p>Any organisation who provides training that aligns with the BREEAM AP competency criteria content for the purposes of providing delegates with the necessary skills to be recognised as an Advisory Professional by BREEAM.</p> <p>Examples of the types of training provided may be the provision of an independent third party course or an internal course within an organisation. In both cases the purpose will be to formally train staff with the intention of them being recognised by BRE Global and BREEAM via the relevant qualification and membership listing, e.g. BREEAM AP design/site.</p> <p>Delegates from such courses will go through a comparable formal competency assessment to that carried out for other routes to AP status. This assessment will be set by BRE Global to evaluate competency against the requirements set out in the AP competencies below.</p>	<p>Alternative training method</p> <p>There are alternative routes to gaining recognition of the necessary skills, knowledge, expertise etc. required to be eligible for the BREEAM AP competency assessment (to become a qualified BREEAM Advisory Professional). One or a combination of the routes may be acceptable in this respect:</p> <ul style="list-style-type: none"> – An appropriate period of experience working on a range of BREEAM projects but not holding any formal BREEAM qualification. – Training and qualification in an environmental assessment method such as BREEAM or other method. – Training and qualifications not verified by BRE Global, but which demonstrably covers one or more elements of the AP Competency Criteria.
<p>Qualified BREEAM AP</p> <p>An individual who has successfully completed any recognised training and passed the associated BREEAM AP competency assessment.</p>	<p>BRE Global Subscription Scheme</p> <p>Subscription of BREEAM AP is achieved by successful completion of BREEAM AP exam. BREEAM APs get access to BRE Academy Membership as part of their annual subscription fee and are required to complete 15 hours of CPD to keep current and up to date on BREEAM/sustainability related issues and updates. Some CPD is mandatory (e.g. updates to BREEAM Schemes).</p>
<p>Accreditation</p> <p>A process by which BRE Global verifies that a training provision meets the requirements of the AP competency framework.</p>	

Your input

As a key stakeholder in the BREEAM assessment process or a potential BREEAM AP training provider we are seeking your views on:

- The proposed model for the BREEAM AP.
- The proposed AP competency framework and by extension.
- What skills and experience an AP need to bring to the table in order to deliver the intended benefits and value.

This is being done via an online consultation available [here](#). It is anticipated that the completion of the online consultation proforma approximately 45 minutes to fully complete. Detailed completion of free text answer options may extend this timescale. It is possible to save a partially completed consultation proforma by closing the page and re-opening the link from the same device so split the time required to complete it.

We are keen to receive views from as many stakeholders as possible, so please feel free to forward this consultation paper to colleagues, clients and associates in your network who you think would also like to provide input.

The consultation will close at the end of Friday 1st July.

Your feedback will support refinement of the BREEAM Sustainability Champion role in line with industry needs. It will also further support BREEAM's aims of promoting collaborative working practices to encourage flexible, relevant and cost-effective ways of delivering quality built environment projects and best practice in sustainable construction.

We look forward to and welcome your input.

Defining the role of the Sustainability Champion – Proposals and Follow up Consultation

Table 1: BREEAM Advisory Professional Competency Criteria

Ref	Core Competency	Competency Description	Competency or behavioural indicators
A	<p>Knowledge and expertise</p> <ul style="list-style-type: none"> – BREEAM – Sector Buildings – Lifecycle stage <ul style="list-style-type: none"> – New Construction – Refurbishment/fit out 	<p>BREEAM – have a clear understanding of BREEAM process and application including programme and cost and benefit implications at the optimum points in the project to promote sustainability of the end product, achievement of the certified BREEAM target taking into consideration and advising on value and cost considerations where appropriate.</p> <p>Sector and Lifecycle stage – have an appropriate level of knowledge for the sector and lifecycle stage for which advice is to be provided.</p>	<ol style="list-style-type: none"> 1 General knowledge of how the built environment sector focused on works e.g. <ul style="list-style-type: none"> – Structures (design team, project team etc. – Roles and responsibilities – Procurement routes – Links with regulation/alternative standards. 2 General knowledge of all BREEAM schemes and how they are applied to development types. 3 Understand the pitfalls in BREEAM process <ul style="list-style-type: none"> – Risks of these pitfalls – Where things can go wrong. 4 Have a basic understanding of the pre assessment process and BREEAM pre assessment estimator. 5 Have a basic understanding of BREEAM registration process and versions associated with schemes development. 6 Be able to scheme classify assessments correctly. 7 Understand the time critical aspects of BREEAM including <ul style="list-style-type: none"> – Employing a BREEAM assessor – Understanding which experts need to be consulted as part of the assessment process. 8 Understand the boundaries of the assessor role and the need for impartiality and management/mitigation of any conflicts of interest (for the assessor and BRE Global). 9 Have an understanding of the respective roles and responsibilities of the Sustainability Champion and the BREEAM assessor. 10 Understand the structure of BREEAM documents e.g. <ul style="list-style-type: none"> – Technical manual – Guidance notes – Knowledge base. 11 Understand tradeable credits and minimum standards, how they can influence project decisions/timings, specification and overall assessment targets/success. 12 Understand the relative worth (or weighting) of a credit, its cost for implementation, and its importance/relevance to advising the client and other relevant stakeholders on how to achieve required performance. 13 Understand the mandatory requirements and minimum standards which must be met to support achievement of a BREEAM rating. 14 Understand the importance of planning and organisation for the gathering of assessment information appropriately in order to facilitate a successful and timely certification decision/outcome and the possible ways of managing compliance related risks that can arise during this process. 15 Have an understanding of the BREEAM evidence process <ul style="list-style-type: none"> – Documentation required – Roles in gathering and presenting the information. 16 Have an understanding of the BREEAM certification process.

Defining the role of the Sustainability Champion – Proposals and Follow up Consultation

Ref	Core Competency	Competency Description	Competency or behavioural indicators
B	Drivers and benefits of BREEAM	<p>BREEAM drivers: have a clear understanding of the drivers behind BREEAM and therefore be able to promote and support the sensible achievement of the BREEAM criteria specific to the project.</p> <p>BREEAM benefits: Have a clear understanding and be able to articulate the benefits of BREEAM, and assessment and certification in the short, medium and long term especially in relation to:</p> <ul style="list-style-type: none"> – Economic and value – Environment – Society and Health & Well Being – Sustainability. 	<ol style="list-style-type: none"> 1 Have an understanding the background and history e.g. how it started, has grown and expanded from the UK to an international standard. 2 Have an awareness of the regulation and policy associated with the BREEAM process. 3 Have an understanding the broader scope, principals and objectives of BREEAM, how it delivers/achieves these and therefore relates to successful application of the scheme. 4 Have an understanding drivers and benefits behind BREEAM at a strategic, scheme category and issue specific level. 5 Understand that BREEAM goal is to recognise a project for what they can do rather than penalise the project for what they cannot do.
C	Communication and influencing skills	<ul style="list-style-type: none"> – Communicate the BREEAM case, confidently, clearly, independently and competently. – Vary the way ideas and information are communicated ensuring their message is understood. – Have the skill and knowledge to influence technical discussion/debate to support an outcome beneficial to the project and BREEAM goals. 	<ol style="list-style-type: none"> 1 Contribute to/chair meetings and discussions. 2 Communicating clearly and effectively complex/technical information to a wide spectrum of audiences. 3 Lead and sustain debates. 4 Read and synthesise information; or write different types of documents and be able to communicate the information at an appropriate level. 5 Work effectively with colleagues, clients, suppliers or the public in support of meeting BREEAM aims, and be aware of the needs and concerns of others, especially where related to interpreting and understanding of the BREEAM requirements. 6 Positively influence others, creating acceptance and support for ideas supporting the achievement of the BREEAM target for the project.
D	Engagement and facilitation skills	Be able to engage and facilitate discussion to best effect to maximise the potential to achieve the point pursued or reach the best BREEAM/Sustainability related outcome.	<ol style="list-style-type: none"> 1 Identify, engage with and respond to a range of project stakeholders. 2 Facilitate discussions within the project team managing conflicting requirements and risks of non-compliance, providing informed and accurate advice and guidance as required). 3 Understand the motives and attitudes of others and be aware of different roles. 4 Influence decision-making ensuring the drivers and goal of BREEAM are not compromised to achieve the BREEAM performance target for the project. 5 Seek the opinions and contributions of others. 6 Promote development opportunities and activities. 7 Champion group decisions and manage conflict for the achievement of common goals and objectives.

Defining the role of the Sustainability Champion – Proposals and Follow up Consultation

Ref	Core Competency	Competency Description	Competency or behavioural indicators
E	Coordination and management skills	Be able to organise and manage discussions and activities to maximise the potential to achieve the point pursued or reach the best BREEAM/Sustainability related outcome.	<ol style="list-style-type: none"> 1 Demonstrate an ability to organise and manage multiple tasks. 2 Demonstrate an awareness of and have time management skills. 3 Have an understanding of when to consult with relevant stakeholders or advise on consideration of BREEAM criteria at optimum stages in the BREEAM process. 4 Implement sustainable thinking at optimum stages. 5 Delivery of performance target.

Defining the role of the Sustainability Champion – Proposals and Follow up Consultation

Appendix A: The relationship between formal BRE recognised BREEAM roles

A breakdown of key roles involved in the BREEAM process

	Associate	Advisory Professional	Assessor
Features of Role	<ul style="list-style-type: none"> – Provides a broad and detailed understanding of the BREEAM process, the language used and how to navigate the manuals and credits system. – Provides information on how to deliver BREEAM efficiently, and to get the most from the scheme – Advises on how to avoid common mistakes and manage risk from pre-tender through to completion of the project. 	<ul style="list-style-type: none"> – Advising clients and the design/ construction team on the criteria specified within the relevant scheme technical manual. – Informing design/specification/construction decisions throughout the life cycle stage. – Assisting the design/construction teams in the gathering of project/building information required by the assessor to undertake an assessment and determine compliance. – Monitoring and reporting to the design/ construction team and client on compliance and risks of non-compliance. 	<ul style="list-style-type: none"> – Registering projects with BRE Global. – Co-ordinating the gathering of project/ building information necessary to undertake an assessment and determine compliance (or otherwise) with scheme criteria. To include where relevant, undertaking site-visits to verify compliance. – Formal assessment of projects against relevant BREEAM schemes including evaluation of evidence to demonstrate compliance and determination of the rating achieved. – Submitting assessments and supporting evidence to BRE Global for a certification decision.
Purpose	To recognise where members of the delivery and clients teams, including contractors, engineers, architects, product manufacturers and supply chains have a sound general understanding of the principles and process that lie behind BREEAM.	To ensure that design teams, specifiers, constructors and other key stakeholders are able to call on and be guided by 'scheme related' expertise as a part of the decision making process for the project and therefore identify opportunities to maximise performance and work towards a selected target rating in the most cost-effective, timely and solutions-orientated way possible.	To register and carry out a BREEAM assessment without bias against the criteria and processes set out within the appropriate scheme and independently of the delivery team. Assessors are required to identify and manage any conflicts of interest that may occur in carrying out this service.
Contribution to the BREEAM process	<p>The BREEAM associate qualification is a building block to help understand what BREEAM is about, involves, and how to effectively and proactively support the delivery process day to day through the scope of the individual's influence on the project.</p> <p>This role is generally about providing BREEAM understanding and awareness within the design team.</p>	<p>The role of the AP is to facilitate and coordinate the design/project team to facilitate:</p> <ul style="list-style-type: none"> – Identification of opportunities and risks associated with BREEAM compliance. – Timely and successful BREEAM scheme related target setting. – Scheduling, prioritisation and monitoring of performance and non-compliance risk. – Achievement of the target BREEAM rating. <p>This role is generally about providing specialist BREEAM guidance and takes the lead in integrating BREEAM into the design process to the design teams, clients and others as relevant.</p>	<p>Individual assessors are trained and quality assured by BRE Global and carry out assessments on behalf of their licensed organisation (a contract will exist between their client and the licenced assessor organisation, not directly with the assessor or BRE Global).</p> <p>In undertaking an assessment, an assessor collects and evaluates evidence in order to assess the degree of compliance with the performance and process criteria defined in the relevant scheme version's technical manual. Once this process is complete the assessor is responsible for submitting the assessment to BRE Global for quality assurance and a certification decision.</p> <p>Following successful completion of the quality assurance process, the assessment can be certified. The certificates are produced by BRE Global and issued to the Assessor, who can then pass the certificate on to the client.</p> <p>The certificate confirms to any and all interested parties and in most cases, the issuing of the certificate marks the end of the certification process involving BRE Global.</p>

Defining the role of the Sustainability Champion – Proposals and Follow up Consultation

	Associate	Advisory Professional	Assessor
Role within BREEAM assessment process.	Typically will be a member of the main design and/or construction team on a project. They may be an architect, engineer, specialist consultant, contractor etc. Their main role is in ensuring that the project is designed/built to meet BREEAM criteria targeted by the design team by integrating these into the main decision making processes. There is no formal relationship with the assessment process although the level of expertise will assist in an efficient design, data gathering and assessment process.	Acts as a formal link between the design team and the BREEAM Assessor assisting in the preparation and collation of evidence and liaising with the assessor. They will help set targets against BREEAM criteria and will monitor progress and adherence to these through the relevant stages of the project. Credits are available where an AP is appointed and supports the delivery team in the delivery of a BREEAM compliant project and assessment.	Provides the formal route to certification by carrying out an independent assessment against the requirements of the scheme, determining and justifying compliance with the BREEAM criteria and submitting a completed assessment report to BRE Global for QA and an independent certification decision.
Competency assessment.	Exam and ongoing CPD (15 hours of relevant CPD which is BREEAM related where appropriate).	Competency Assessment (TBC) and ongoing CPD (TBC)	Exam, ongoing quality assurance of assessments.
Qualification status.	BREEAM Associate with Badge.	BREEAM Advisory Professional listed by BRE Global.	Licensed BREEAM Assessor with BRE Global.
Maintaining the qualification.	An annual subscription and CPD requirement will ensure up to date knowledge and continued use of the badge.	An annual subscription and CPD requirement will ensure up to date knowledge and continued use of the qualification. Adhering to a Code of Conduct.	Maintenance of a licence, regularly submission of assessments for Quality Assurance or re-training.