Defining the Role of the Sustainability Champion

External Consultation Response Document

1. Introduction

This document summarises the engagement and consultation which took place as part of the review of the Sustainability Champion role in BREEAM. It includes the key feedback themes and any resulting actions taken. This document is intended for those who have an interest in the background, process and outcomes of this review and the changes made to the Sustainability Champion role as a result.

2. Background to the BREEAM Sustainability Champion Role

The term ‘Sustainability Champion’ was introduced into the BREEAM UK building level schemes in 2014. It is a generic title which encompassed a number of previously recognised routes for providing informed input into the application of BREEAM on a project, that in-turn contributed to meeting BREEAM performance targets.

Sustainability Champions are defined as:

Individuals who are trained and qualified to provide BREEAM related advice to the design team to facilitate timely and successful target setting, scheduling, prioritisation and monitoring of BREEAM compliance relating to the design and construction of the building.

The purpose of the role is to ensure that clients, design team, specifiers and other key stakeholders were able to call on and be guided by ‘scheme related’ expertise as part of the decision-making process for a project independently from the formal assessment processes associated with BREEAM. The aim is to provide a route to maximising a building’s performance and achieve the target certified rating in the most cost effective, solutions-orientated way by integrating guidance into the decision making process.

To be able to deliver this, a Sustainability Champion needs to have a sound knowledge of BREEAM requirements and approaches, as well as strong communication skills to interact effectively with members of the project team. They also need to have the ability to manage, organise and influence BREEAM related activities during the course of a project, providing a focused point of contact within the design team. Some of these skills could be demonstrated by others inducing consultants, design team members and BREEAM Assessors.

However, the use of an independent qualification allowed the role to be recognised by industry as credible and reliable, as the individual will have been through a formal competency evaluation process. This means that they are able to claim a level of verified knowledge and skills relating specifically to BREEAM and the BREEAM process.

3. Review of the Sustainability Champion Role

3.1. Background to the BREEAM Sustainability Champion review

Since its introduction, feedback has been received relating to the applicability, relevance, value and purpose of the BREEAM Sustainability Champion (SC) role. A number of issues have been raised. The key areas of concern were as follows:

- Lack of clarity of the role’s purpose and definition
- Inconsistency in the quality and service provided by SCs to relevant stakeholders in the process
- Lack of flexibility in the route to becoming an SC
- Perceived overlap with other roles such as the BREEAM Assessor
- Lack of value from the appointment of an SC
- Lack of clarity on the inputs that can be expected from an SC on a project
Led by the desire to qualify and address these concerns, in 2015 BRE Global began a review of the Sustainability Champion role. Its aim was to examine the issues raised in more detail and use this knowledge to review and clarify the role, therefore addressing the issues raised and as appropriate, enhancing the value and maximising benefits of the role.

3.2. The Review, Clarification and Refinement Process

The process consisted of gathering feedback on the role from a range of key stakeholder groups and was carried out between March 2015 and March 2017. There were two stages to the review:
- Stage 1: Reviewing the SC Role – perceptions, views and opportunities
- Stage 2: Reviewing the SC Role – clarification, refinement and evolution

Stage 1: Review of the Sustainability Champion Role – perceptions, views and opportunities

This stage was split into two parts. The first part focused on collating and examining views on the SC role from a range of stakeholders. Consultees were identified from those that had provided feedback and others who had experience of using or working with SCs on projects.

Table 1: Summary of activities during Stage 1

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Online consultation</th>
<th>Focused input and review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>Seek feedback on the proposals and update the content which when implemented will act as the changes to the SC role</td>
<td>Explore feedback received during the online consultation in more detail with specific stakeholder groups</td>
</tr>
<tr>
<td>Activities</td>
<td>Consultation with a representative range of stakeholders to review and comment on the content and its application</td>
<td>Meetings and workshops with industry groups and other relevant stakeholders</td>
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</tbody>
</table>

The second part focused on an internal review of the existing the SC aim, purpose, competency requirements, associated operational structures (routes to becoming qualified) and the relationship between the SC roles and others involved in the BREEAM assessment process, including that of the BREEAM Assessor.

Following the review and analysis of the information gathered there was strong evidence to support the view that clarification and refinement of the SC role was needed.

3.3. Stage 2: Review of the Sustainability Champion Role – clarification and refinement

Following the conclusion and outcome of stage 1, BRE focused on agreeing revisions and clarifications to the SC role in 2016. Emphasis was placed on how to better reflect the value of the role, including maximising its relevance to the stakeholder group and wider industry.

A key output from this stage was the development of proposals highlighting changes to the SC. This was one part of a series of activities conducted in this stage, summarised in Table 2.
Table 1: Summary of activities during Stage 2

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Development of proposals</th>
<th>Online Consultation</th>
<th>Focused input and review</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Develop proposals clarifying and refining the SC role where relevant</td>
<td>Seek feedback on the proposals and update the content, which when implemented will act as the changes to the SC role</td>
<td>Explore feedback received during the online consultation in more detail with specific stakeholder groups to inform amendment to the SC role</td>
</tr>
<tr>
<td>Activities</td>
<td>- Analysis of feedback gathered during Stage 1</td>
<td>- Follow-up correspondence with relevant stakeholders</td>
<td>- Desk based research to develop proposal to clarify the SC role</td>
</tr>
<tr>
<td></td>
<td>- Online consultations with a representative range of stakeholders to review and comment on the proposals and explore further feedback received</td>
<td>- Desk based research to develop proposal to clarify the SC role</td>
<td>- Meetings and workshops with industry groups and other relevant stakeholders</td>
</tr>
</tbody>
</table>

The information collected during the consultation is summarised in the following sections along with a summary of the BRE Global response and steps taken.
4. Summary of feedback received and action taken

The following sections detail the key feedback themes identified during the both review stages and the BRE Global response to this feedback and action taken as a result.

There were a number of overarching themes identified over the course of the review. These formed the basis for the review questions.

<table>
<thead>
<tr>
<th>Ref</th>
<th>Issue</th>
<th>Feedback received</th>
<th>BRE Global response</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Working as or with a BREEAM Sustainability Champion</td>
<td>Unclear role definitions and requirements mean there is a lack of consistency between SCs. This means the value that is added can vary.</td>
<td>Agreed.</td>
<td>Definition and competencies explored and refined.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>The review focused on exploring and clarifying aspects such as the definition and competency requirements.</td>
<td></td>
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<tr>
<td>2</td>
<td>The merits of a BREEAM single point of contact</td>
<td>It is useful to have a single BREEAM point of contact who can address all BREEAM related decisions. Can the role of the Assessor and SC be combined into a single role?</td>
<td>Considered</td>
<td>Maintain the existing point of contact model</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Whilst the comment is a valid one in many instances, it is important to recognise that there are two distinct sets of responsibilities:</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>1) to assess a project against BREEAM requirements for compliance in an impartial manner and</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>2) working with the project team to support them and other stakeholders in defining, achieving and monitoring BREEAM performance throughout the project timeline and providing support in determining the most relevant options/decisions for the specific project circumstance.</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>It is recognised that both of these roles may be provided by a single individual or organisation as long as appropriate safeguards are in place to protect impartiality in the assessment process.</td>
<td></td>
</tr>
</tbody>
</table>
4.1. Stage 1 – Review of the Sustainability Champion Role

Scope and Background of Respondents

The graphs below are extracts from the results of the consultations held at stage 1. They indicate the range of stakeholders who responded and their familiarity with/experience of BREEAM schemes across the built environment lifecycle stages. They show that while respondents covered a wide range of stakeholders, BREEAM Assessors/Accredited Professionals formed a large majority of responses received.

This potential bias was taken into account during the analysis of feedback to ensure all stakeholder group views were considered.

Figure 1: Main roles of respondents at Stage 1

- Architect: 9%
- Contractor: 9%
- Design Manager: 4%
- Engineer: 5%
- Project Manager: 4%
- Sustainability Consultant: 55%
- Other (Environmental Advisor/Manager, Surveyor): 14%

Figure 2: Role relating to the BREEAM process of respondents

- Specifier of BREEAM: 12%
- Public Sector Client: 2%
- Private Sector Client: 4%
- BREEAM Assessor: 68%
- BREEAM Accredited Professional: 55%
- Site Sustainability Manager: 7%
- Project team member: 34%
- Supplier of a product or service to a BREEAM project: 15%
- Other (Business System Manager, Lead Designer): 7%

Figure 3: Built environment life cycle stage at which respondents had applied a BREEAM scheme

- Outline/Strategic Planning: 72%
- Design (New Build and Refurbishment): 92%
- Construction: 92%
- Fit-out: 50%
- In-use: 26%
Key feedback themes and BRE Global's response and Action

The table below summarises the feedback received during Stage 1 of the review and the BRE Global approach to addressing the issues raised. Stakeholders were consulted on the key areas listed below:

- The aim, purpose and value of the role
- Operational structures including routes to evaluating competency and becoming qualified
- The relationship between the SC and existing professionals in the construction process
- The key features of the role
  - Knowledge and Understanding
  - Communication and Engagement
  - Leadership and Management
  - Promotion of Sustainable Practices
  - Commitment to Professional Development

Associated competency requirements were detailed under each key feature during the consultation. The table also includes the key feedback provided on those requirements for each feature.
<table>
<thead>
<tr>
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<th>BRE Global response</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Aim and role of the SC</td>
<td>The aim is suitable but more emphasis should be placed on a holistic view and on communication. There should be more guidance on the difference between an Assessor and a SC to clarify the additional value of the role.</td>
<td>Noted. During the review the aim and role of the SC was refined and where relevant clarified.</td>
<td>Further guidance and definitions have been created to increase clarity of the role</td>
</tr>
<tr>
<td>2</td>
<td>Value of the SC role</td>
<td>Value of the SC role is unclear. While the aim of the role is generally positive, the value realised seems dependent on the individual SC’s level of experience/skill and/or the way in which they are engaged and the degree to which they are involved in informing the decision making processes.</td>
<td>Noted. Greater detail added to the role description and competencies to increase consistency between SCs.</td>
<td>Refinement of role description and competencies.</td>
</tr>
<tr>
<td>3</td>
<td>Previous experience working with a Sustainability Champion</td>
<td>There has been a mix of positive and negative experiences when using a SC. Value can be added but is dependent on the individual SC and project.</td>
<td>Agreed. Our aim is to improve competency and consistency levels so that APs are best placed to provide general support and add value to the project team.</td>
<td>More detail added to the role description and competencies. CFD monitoring to promote consistency between SCs.</td>
</tr>
<tr>
<td>4</td>
<td>Lack of clarity on terms used relating to the SC e.g. BREEM Accredited Professional, BRE Site Sustainability Manager, BREEAM Sustainability Champion</td>
<td>Unclear what the difference is between an SC, BREEM Accredited Professional and Site Sustainability Manager. One ‘role’ preferred. Clarification or rationalisation required.</td>
<td>Agreed. Feedback received has led to the clarification of terminology and, where relevant, consolidation of terms.</td>
<td>Consolidation of terms. A single title, BREEM Advisory Professional now replaces the terms previously used terms.</td>
</tr>
<tr>
<td>5</td>
<td>Route to becoming a Sustainability Champion</td>
<td>Why go through BRE’s training process if I already have extensive knowledge and experience in advising on creating sustainable buildings?</td>
<td>Agreed. Alternative routes to demonstrating competency were explored including those based on the level of experience</td>
<td>Alternative routes to achieving the Sustainability Champion qualification will be recognised, through a well-defined set of competency requirements for the role.</td>
</tr>
<tr>
<td>6</td>
<td>Existing professionals who could act as a SC</td>
<td>A number of other professionals could display the competencies of the SC due to existing skills and experience: - Sustainability professionals e.g. consultants and managers - Design professionals e.g. architects and engineers - Other BREEAM professionals e.g. Assessors</td>
<td>Agreed. This was considered during, and contributed to, the development of the alternative routes to demonstrating competency.</td>
<td>Alternative routes to achieving the Sustainability Champion qualification will be recognised, through a well-defined set of competency requirements for the role.</td>
</tr>
<tr>
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</tr>
<tr>
<td>7</td>
<td>Validity of current key features of SC required to perform the role and give value. (See paragraph above)</td>
<td>There was general agreement that all key features listed are or should be part of the SC role. Other features should form part of the role (many listed).</td>
<td>Agreed. Other features suggested will be considered and integrated into the role as appropriate.</td>
<td>Refinement of key features.</td>
</tr>
<tr>
<td>8</td>
<td>Knowledge and Understanding associated with competency requirements</td>
<td>Clarification required in some areas (how is practical experience demonstrated?). Other aspects need to be made stronger or added for instance, holistic sustainability focus – look beyond BREEAM, awareness of the commercial implications of decisions, make Chartership a prerequisite to give added value.</td>
<td>Agreed. The competency requirements were reviewed and, where appropriate, were strengthened to encompass wider sustainability and industry knowledge and experience.</td>
<td>Features of the role and associated competency requirement further developed to produce a more detailed and comprehensive competency description / indicator.</td>
</tr>
<tr>
<td>9</td>
<td>Communication and Engagement associated competency requirements</td>
<td>Communication is a crucial skill for a SC to ensure advice is understood and implemented by the project team.</td>
<td>Agreed. The competency and training/testing requirements will be reviewed to emphasise the requirement of strong communication skills.</td>
<td>Further guidance and definitions have been created to increase clarity of the role.</td>
</tr>
<tr>
<td>10</td>
<td>Leadership and Management associated competency requirements</td>
<td>Can be difficult for an SC to lead due to a project team’s structure. Maybe more effective as a key team member who can provide organisation on sustainability issues and discussions rather than an external consultant.</td>
<td>Accepted. The competency requirements will be reviewed and where relevant amended to represent best practice in communication and leadership/support skills.</td>
<td>Development of competency requirements to better reflect the scope and influence the AP can have in projects.</td>
</tr>
<tr>
<td>11</td>
<td>Promote Sustainable Practices associated with competency requirements</td>
<td>A SC should encourage sustainable practices as it is the project team that will implement and deliver the solutions. Unclear if a SC can always promote sustainable practices. What is BRE expecting here? Competency should be reworded.</td>
<td>Accepted. A key focus should be the knowledge and skills to promote the benefits of sustainability and sustainable solutions in ways that are both practical and achievable.</td>
<td>The competency requirements will be reviewed and where relevant reworded and restructured, or withdrawn, taking into account feedback received.</td>
</tr>
<tr>
<td>12</td>
<td>Commitment to Professional Development associated competency requirements</td>
<td>Continuous Professional Development (CPD) is important for all professions to demonstrate ongoing and up-to-date competency. Not sure of its specific relevance for SC role which is not a separate discipline. CPD a requirement of many professional institutions anyway so would this suffice?</td>
<td>Noted. The need to be up to date on BREEAM requirements and methods means that additional CPD would be required to meet the proposed competencies.</td>
<td>More specific CPD requirements and checks.</td>
</tr>
</tbody>
</table>
4.2. Stage 2: Reviewing the SC Role – clarification, refinement and evolution

Scope and Background of Respondents

The graphs below show the breakdown of stakeholders that engaged with the BRE Global consultations at stage 2. They highlight the background of respondents and their experience of BREEAM across the built environment life cycle stages. As with stage 1, the majority of respondents were sustainability consultants, BREEAM Assessors and Accredited Professionals however this was considered when analysing the results and producing outcomes.

Figure 4: Main roles of respondents at Stage 2

- Academic: 1%
- Architect: 4%
- Contractor: 8%
- Design Manager: 1%
- Engineer: 8%
- Facilities Manager: 1%
- Product Manufacturer: 1%
- Project Manager: 4%
- Sustainability Consultant: 63%
- Other (Environmental Manager, Property Owner): 10%

Figure 5: Role relating to the BREEAM process of respondents

- Specifier of BREEAM: 10%
- Public Sector Client: 5%
- Private Sector Client: 5%
- BREEAM Assessor: 76%
- BREEAM Accredited Professional: 73%
- Site Sustainability Manager: 9%
- Project Team Member: 31%
- Supplier of a product or service to a BREEAM project: 15%
- Other (Trainer, Environmental Manager): 5%
Figure 6: Built environment life cycle stage at which respondents had applied a BREEAM scheme

<table>
<thead>
<tr>
<th>Stage</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outline/Strategic Planning</td>
<td>66%</td>
</tr>
<tr>
<td>Design (New Build and Refurbishment)</td>
<td>90%</td>
</tr>
<tr>
<td>Construction</td>
<td>90%</td>
</tr>
<tr>
<td>Fit-out</td>
<td>59%</td>
</tr>
<tr>
<td>In-use</td>
<td>23%</td>
</tr>
</tbody>
</table>

Key feedback themes and BRE Global’s response and Action

The table below summarises the feedback received from the respondents to stage 2 as well the BRE Global approach to addressing the issues raised. At this stage, stakeholders were consulted on the key areas listed below and the table is structured to reflect this.

- The definition of the role
- The key features and competencies of the role
- Operational structures including routes to becoming qualified
- The value of the SC
- Industry understanding of the SC role and other BREEAM roles
<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| 1   | Previous experience working with a Sustainability Champion | - Can make a positive difference for BREEAM and sustainable goals  
- Impact is based on the person and the project  
- Lack of consistency and expectations, varying value | Agreed. The outputs of this review are geared towards a more consistent and positive outcomes from APs for the project team. | Restructure of role, development of competencies and CPD requires |
| 2   | Role of the Advisory Professional | - Proposed definition is good, should help meet sustainability goals  
- Needs to be disseminated more widely  
- Promote the role as more than just getting the AP credits | Agreed. Marketing and dissemination activities planned to increase industry understanding. | New promotion and communications strategy for BREEAM AP developed and will be implemented |
| 3   | Competency criteria | - General approval of the competencies  
- Should include more on wider sustainability and construction knowledge to make it a more rounded and respected expert  
- Some amendments to align with real life, practical application | Agreed. Clarifications and revisions made to competencies to improve applicability. | Refinement of competencies to reflect feedback received. |
| 4   | Maintaining competency | - Need more clarity on the CPD that is accepted  
- Should allow flexibility in where to record CPD i.e. Academy, professional bodies | Noted. CPD requirements will be clarified and recording process agreed to ensure ongoing competency. | List of CPD requirements to be defined |
| 5   | Route to becoming an Advisory Professional | - Good to allow experienced people to not have to go through training  
- Keep training course for those who want it  
- Good to allow other companies to provide the training  
- Assessment should be the same for both routes | Noted. Proposed routes to becoming an AP will be maintained. Where necessary practical implementation considerations may result in slight changes. Little interest was shown in the proposed accredited training provider route therefore this will not be taken forward at this stage. | No/minimal change to proposed AP qualification route and creation of alternative routes to qualification |
| 6   | Value | - Has a positive impact if engaged early and the client knows what to expect  
- Need to encourage early engagement which generally has the most value | Agreed. | More information about the value of the AP role will be made available. |
<table>
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</thead>
</table>
| 7   | Awareness and understanding of the role in industry | - Industry’s understanding of what the role is can be poor  
- Clients often expect an Assessor to give advice and consultancy  
- Clients often see a BREEAM professional who should be able to do all BREEAM related tasks | Noted.  
Marketing and dissemination activities are planned to increase industry awareness and understanding. | New promotion and communications strategy for BREEAM AP developed and will be implemented |
| 8   | Relationship between recognised BREEAM roles (Associate, AP, Assessor) | - There are strong overlaps between the roles  
- Need for the three roles to be more clearly defined and then spread the message to industry | Noted. | Further guidance created to clarify the role aims, definitions and levels of involvement in the BREEAM process including the creation of a document; BREEAM Professionals – A guide to understanding their roles. |
Next Steps

**What we are going to do next with all the information collected**

The information collated over the period of this review has resulted in substantial changes to the AP role. It will, and in some areas already has, resulted in changes to media, literature, and ways of working for both existing APs and internally within BRE.

BRE will work with new and existing APs to implement these changes through the standards and services that it provides through its ongoing development and improvement activities.