RISE | Retrofit information, support & expertise

Retrofit Coordinator role & Quality Assurance

Supply chain advice pack

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www.riseretrofit.org.uk

Introducing the Retrofit Coordinator role

Retrofitting homes is central to the UK's environmental strategy and achieving net-zero carbon emissions by 2050. With 80% of existing housing stock still in use by that deadline—about 26 million homes—energy efficiency upgrades are vital (UK Parliament). Half of these properties have an EPC rating of D or lower, highlighting the urgency of intervention[1]. Tackling this challenge requires a skilled supply chain supported by a structured framework to ensure quality, accountability, and risk management—precisely the role PAS 2035 and the Retrofit Coordinator fulfil.

For years, energy efficiency measures lacked oversight, often leading to unintended issues like damp and poor air quality. Recognising the need for regulation, the UK government conducted a sector-wide review that resulted in the 2016 Each Home Counts report[2], which laid the foundation for PAS 2035. Developed by the British Standards Institution (BSI), this specification sets the standard for domestic retrofit projects.

PAS 2035 redefines retrofit management, promoting a whole-house approach to energy efficiency improvements and carbon reduction. It establishes clear project stages—assessment, design, installation, and evaluation—while assigning responsibilities to key roles, including the Retrofit Assessor, Designer, Evaluator, and, crucially the Retrofit Coordinator.

Source: Baily Garner

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[1] Rightmove EPC article
[2] 2016 Each Home Counts report

The Retrofit Coordinator: Role and importance

A critical role in a complex environment

At the heart of PAS 2035 is the Retrofit Coordinator, who acts as the linchpin of the retrofit process. This individual is tasked with overseeing all retrofit activities from start to finish, ensuring compliance with PAS 2035 while balancing client expectations and public interest. Think of the Coordinator as a retrofit-specific project manager, albeit one with a more specialised skillset focused on risk management, compliance, and technical oversight.

To become qualified, one must complete the Level 5 Diploma in Retrofit Coordination and Risk Management, a role-specific qualification that PAS states also requires prior professional or vocational experience in building or construction-related disciplines. This prior professional or vocational experience would be met by practising Chartered roles such as Chartered Building Surveyors, Project Managers, Contract Administrators or other professionals involved in delivery of works to existing homes. Vocational experience could include contract or site management of similar works. It is this prior professional or vocational experience that will assist the Retrofit coordinator to understand the implications of work interactions and sequencing.

The Coordinator’s scope of work

The Retrofit Coordinator’s duties span multiple areas, including:

1. Early engagement with the client to establish project aims
2. Ensuring project compliance with PAS2035 standard at all stages
3. Ensuring compliant document is lodged with Trustmark on an ongoing basis
4. Overseeing dwelling assessments
5. Identifying suitable Energy Efficiency Measures (EEMs)
6. Ensuring PAS 2030-compliant installation
7. Monitoring the installation process
8. Conducting post-completion evaluations

What makes this role unique is its flexibility in terms of employment. A Coordinator may work for the client, an assessor, a designer, an installer, or a monitoring organisation. Regardless of where they sit, their primary responsibility is to uphold the standard and to serve the best interest of the project without any undue influence. Consideration of this may affect the appointment and reporting lines of the coordinator.

The importance of on-site presence

Crucially, PAS 2035:2023 mandates that Retrofit Coordinators remain actively involved during project delivery. Remote sign-offs or desk-based reviews are no longer acceptable. The Coordinator must be visible, hands-on, and responsive to challenges as they arise on-site.

Defining responsibilities: Who does what?

While the Retrofit Coordinator is central to the process, they are not expected to manage the entire retrofit project. A distinction must be made between their role and that of a Project Manager. The following table clarifies their responsibilities:

Top Tip: Think about putting an organogram together alongside a responsibility matrix to ensure any gaps in service are filled! Example below.

Item	Retrofit Coordinator	Project Manager
Development of a retrofit scheme and delivery approach	Not responsible	Responsible
Creation of a Project Execution Plan	Not responsible	Responsible
Development and management of a project programme	Not responsible	Responsible
Management of the construction contract	Not responsible	Responsible
Management of overarching Project Risk	Not responsible	Responsible
Management of the project financials	Not responsible	Responsible
Overseeing the PAS 2035 requirements and ensuring they are adhered to	Responsible	Not responsible
Analysing the retrofit assessment and development of suitable EEMs	Responsible	Not responsible
Overseeing energy modelling and development of the medium-term plan	Responsible	Not responsible
Undertaking inspections during delivery to monitor installation quality	Responsible	Not responsible
Undertaking post-completion evaluation	Responsible	Not responsible

Quality assurance

Why quality matters

In PAS 2035, quality is not optional—it is fundamental. Every aspect of a retrofit project, from the materials used to the methods employed, must meet stringent standards to ensure the work is effective, safe, and sustainable. Let us explore how this commitment to quality benefits homeowners, professionals, and the nation at large.

> **Top Tip:** A high percentage of poorly executed retrofit projects could have been issue-free had PAS 2035 principals been followed.

Occupant health and comfort

Properly executed retrofits improve indoor air quality, regulate temperature, and eliminate damp or mould. These outcomes directly enhance occupant health, reducing respiratory issues and increasing general well-being.

Energy efficiency and financial savings

Quality measures undertaken in the right sequence close the performance gap between predicted and actual energy savings. Households benefit from lower utility bills, and the broader economy takes a step closer to achieving national decarbonisation goals.

Durability and longevity

By adhering to PAS 2035, retrofit projects are built to last. This means fewer repairs, longer-lasting installations, and a reduced risk of unintended consequences like structural degradation or moisture ingress.

Funding and regulatory alignment

Meeting PAS 2035 is a prerequisite for accessing government-backed retrofit funding. This ensures that public money supports only high-quality, standards-compliant projects, providing a uniform baseline for all stakeholders. PAS 2035 is a requirement for Warm Homes projects.

Challenges in delivering quality

Adhering to PAS 2035 presents real-world challenges. These must be acknowledged and addressed if the retrofit sector is to grow sustainably.

Training and competency gaps

Retrofit Coordinators need a unique blend of skills—technical knowledge, project oversight, and risk management. While those from surveying or project management backgrounds often adapt well, comprehensive training remains a barrier for many. Initiatives like RISE aim to bridge this gap by making education and certification more accessible.

Perceived cost barriers

If PAS 2035 is viewed as too process-heavy or bureaucratic, it could lead to two dangerous trends: underbidding projects with underqualified staff or treating PAS 2035 as a tick-box exercise rather than a quality framework. Though implementation costs may seem high initially, they are minimal compared to the costs of fixing poor-quality work or addressing long-term structural issues.

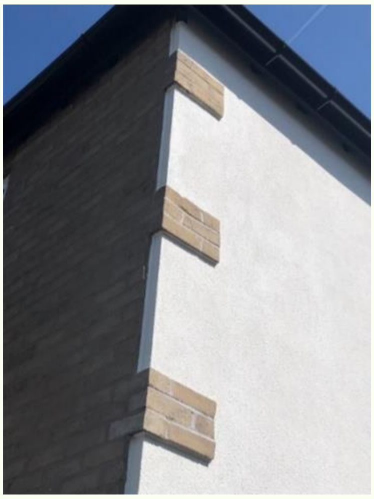
Project complexity

Coordinating multiple professionals, design elements, and performance criteria is inherently complex. Delays in the pre-contract phase are common, especially when data is incomplete or unclear. The early appointment of a skilled Retrofit Coordinator—and ideally, a dedicated Project Manager—can greatly streamline this process.

Why quality is non-negotiable

The success of the UK's retrofit revolution hinges on the consistent delivery of high-quality, compliant, and sustainable projects. PAS 2035 provides the roadmap. By clearly defining responsibilities, insisting on robust training, and placing the Retrofit Coordinator at the core of every project, the standard ensures that we not only retrofit more homes—but retrofit them better.

In a landscape where poor-quality interventions can have serious financial, or worse, health repercussions, quality is not just a desirable trait; it is a necessity. As funding increases and demand accelerates, so too must our commitment to standards like PAS 2035. If we get it right, rewards such as lower emissions, healthier homes, and reduced energy bills will be felt for generations.



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