

# BREEAM Professionals

## A Guide to Understanding their Roles



## Overview

This document outlines the roles and responsibilities of the Advisory Professional and Assessor, and the important part they each play in the successful application of BREEAM.

The document will guide clients, project teams and other BREEAM stakeholders in understanding the value, purpose and crossover of each role throughout the BREEAM assessment process.

BRE Global is the National Scheme Operator for BREEAM UK, BREEAM USA and broader International schemes (BREEAM). This document is focused on the roles within BREEAM and how they are applied to BRE Global schemes.

## About BREEAM

BREEAM is the world's leading sustainability assessment method for masterplanning projects, infrastructure and buildings. It recognises and reflects the value in higher performing assets across the built environment lifecycle, from new construction to in-use and refurbishment. BREEAM does this through third-party certification of the assessment of an asset's environmental, social and economic sustainability performance, using best practice standards developed by BRE.

BREEAM encourages continuous performance improvement and innovation by setting and assessing against a broad range of scientifically rigorous requirements that go beyond regulations and practice. It aims to empower those who own, commission, deliver, manage or use buildings infrastructure or communities to achieve their sustainability aspirations. It builds confidence and value in a project by providing independent certification that demonstrates the wider benefits to individuals, business, society and the environment.

The use of BREEAM enables clients to manage and mitigate the life cycle impacts of a building and provides them with a credible environmental label.

For more information about the National Scheme Operator schemes please visit [www.breem.com/worldwide/](http://www.breem.com/worldwide/)



## The Value BREEAM professionals bring

Credentialed BREEAM professionals have demonstrated through training and examinations that they have the knowledge, skills and experience to support clients to deliver sustainable, healthy, resilient and productive assets using BREEAM.

BREEAM training is delivered only by BRE or our designated training partners to ensure that learners always receive the most current and up-to-date information about BREEAM programs and the highest quality BREEAM training available.



### ASSESSOR

Ensures the validity of the rating, realising the value of certification for the client/asset and future owners and user.

They have the competence, authority and independence to undertake assessments of projects/assets within specific BREEAM programs, determine ratings and apply for certification from an accredited scheme operator.

Each BREEAM program requires an individual Assessor license which ensures that the Assessor is fully competent in a particular BREEAM program.



### ADVISORY PROFESSIONAL

Supports client team in their individual and collective decision-making and evidence preparation.

They have a high level of general knowledge of the relevant BREEAM principles, requirements and processes and the skills and experience needed to inform, guide and facilitate project teams throughout the BREEAM process.

Though not required for certification, the Advisory Professional can facilitate performance optimisation, maximising the value and cost-effective performance from the use of BREEAM.



Visit the BRE Academy at [bre.ac](https://bre.ac) for more information

## The BREEAM Professionals

Both BREEAM professional roles are geared towards supporting the successful application and assessment of BREEAM. Each role performs a different, but complementary function in meeting this purpose.

Collectively they are designed to provide and facilitate the appropriate level of engagement with BREEAM at different stages of the design, procurement construction and operations of assets.

Figure 1 (below) illustrates the relationship between the three roles focusing on the key activities in the BREEAM assessment process.

While in many cases a BREEAM professional will be an external appointment, clients and project teams can (and are encouraged to) build in-house expertise and train and qualify their own staff.

Figure 1: Roles and Activities of BREEAM Professionals.

	Planning/design/construction/ management			Assessment Evidence			Formal Assessment			
	Strategy & Pre-assessment	*2 Advice	Coordination/ facilitation	Coordination	Collation	Compliance advice	Registration	Compliance checking	Compliance verification and assessment report/rating generation	Submission of assessment for BRE Global certification decision
Advisory Professional							*1			
Assessor		*2								

Colour Key:

<span style="border: 1px solid black; display: inline-block; width: 15px; height: 15px;"></span>	Outside of the scope of this role
<span style="background-color: #4CAF50; display: inline-block; width: 15px; height: 15px;"></span>	Can perform but not a core task
<span style="background-color: #2E7D32; display: inline-block; width: 15px; height: 15px;"></span>	Core task


\*1 In BREEAM In-Use, registration can be done directly by the Client or the Client's representative, including the Advisory Professional.

\*2 Under the New Construction and Refurbishment & Fit Out programs, licensed Assessors may also fulfil the Advisory role provided that they report to BRE that both roles are being carried out by the same person and confirmed how potential conflicts of interest are identified and managed prior to the assessment taking place.



## The Assessor



ROLE	SCOPE
<p>A Licensed Assessor is an individual with the training, experience, authority and independence to register and competently undertake assessments of projects/assets, determine ratings and apply for certification from an accredited scheme operator. In doing so, the Assessor ensures the validity of the rating, realising the value of certification for the client/project and future asset owners and users.</p> <p>They are responsible for managing the assessment process and validating a project's compliance against BREEAM. They coordinate the collection of information (or evidence), which will be used to evaluate the project/asset against the relevant scheme criteria. This will involve attending select meetings and undertaking site visits to gather the information. However, assessors are not required to take part in regular design/project team, meetings.</p> <p>Once the Assessor completes an assessment, they submit an assessment report with reference to an auditable trail of evidence, to BRE Global Ltd for a certification decision.</p> <p>Assessors must carry out the assessment without bias against the criteria to uphold the rigour of the assessment process and validity and consistency of certification. In most of the BREEAM schemes, it is the Assessor's responsibility to register the project with BRE Global at the beginning of the assessment. In BREEAM In-Use, either the Client or the BREEAM In-Use Assessor or Advisory Professional (with the Client's permission) may complete this action. In all BREEAM schemes, the Licensed Assessor issues the final certificate to the client after receiving it from BRE Global.</p>	<p>An effective Assessor:</p> <ul style="list-style-type: none"> <li>• Uses their experience and detailed scheme knowledge to confidently engage with and inform the project or asset management team of scheme requirements</li> <li>• Uses their experience and detailed scheme knowledge to confidently engage with and inform the project or asset management team of scheme requirements</li> <li>• Is involved in key stages of the project assessment, ensuring efficient assessment and timely submission for a certification decision</li> <li>• Impartially identifies, communicates and reports areas of compliance and non-compliance</li> <li>• Gathers and references a robust and auditable trail of information as evidence of compliance or non-compliance</li> <li>• Applies and upholds the credibility of the scheme to ensure the certification outcome is robust and consistent</li> <li>• Complies with all the requirements in the Licence Agreement</li> </ul> <p>Typically, the Assessor qualification and role is sought/held by building and real estate service providers/professionals, designers including architects and engineers, energy and environmental consultants.</p> <p>Many Assessors also hold an Advisory Professional qualification and may perform both roles as long as they identify, communicate and manage potential conflicts of interest.</p> 

### Qualification, Status and Remaining Competent

To achieve qualified Assessor status an individual must attend the appropriate scheme Assessor training course and pass the corresponding exams. Once qualified, the Assessor's organisation must take out an assessment licence for the Assessor.

Assessors are:

- Licensed to offer and undertake scheme assessments specific to the scheme they have qualified in
- Publicly listed by BRE Global as a licensed Assessor on [www.GreenBookLive.com](http://www.GreenBookLive.com) and [BREEAM Projects](#)
- Permitted to use the badges of recognition to confirm formal association with the BREEAM programs.


Ensuring a qualified Assessor remains competent involves:

- Maintaining the assessment licence
- Maintaining Professional Indemnity Insurance for the relevant scope of works in accordance with the terms of the Licence Agreement
- Regular demonstration of competency, typically via Quality Assurance audits of assessments submitted for certification within defined timescales or re-training



## The Advisory Professional (AP)



ROLE	SCOPE
<p>A qualified AP is an individual with a high level of general knowledge of BREEAM scheme(s) and assessment processes. They have the skills and experience needed to inform, guide and facilitate teams throughout the life of the project, assisting design, construction and asset management teams in their individual and collective decision-making and evidence preparation throughout.</p> <p>They are typically responsible for the timely and successful scheme related target setting through the prioritisation and monitoring of performance and scheme compliance-related risks. All the while, complying with the Advisory Professional Code of Conduct.</p> <p>APs are critical in that they facilitate the cross-project consideration and prioritisation of project assessment issues relevant to the client's desired objectives and outcomes. Furthermore, they seek solutions that are cost effective, value-added and relevant to the asset's circumstances and end-use.</p> <p>Lastly, they serve as a smooth liaison between the licensed Assessor and the project team to successfully transfer supporting evidence for a timely submission to BRE for a certification decision.</p> <p>There are four AP designations across our family of schemes: Design, Site, and Design and Site for our New Construction and RFO schemes, and Operations for In-Use. An individual is able to obtain one or more qualifications that is suitable to their organisation or client's needs.</p>	<p>An effective AP:</p> <ul style="list-style-type: none"> <li>• Has a holistic understanding and grasp of the issues that influence and impact project/asset/team performance, in pursuit of the target rating.</li> <li>• Supports the client team at the project outset as they assist in the setting of an appropriate target rating for the asset, and can provide advice on wider sustainability matters within the decision making process.</li> <li>• Provides specialist support to the team in exploring their options for achieving the desired sustainability and scheme related outcome with cost effective, timely, value-added and relevant solutions.</li> <li>• Monitors and reports to the project team on areas/solutions/actions that raise the risk of noncompliance.</li> <li>• During the construction stage, the AP who specialises on Site matters additionally: <ul style="list-style-type: none"> <li>- champions sustainability on site</li> <li>- advises the main contractor of actions to be taken throughout the construction stage</li> <li>- coordinates energy and other site impact monitoring</li> <li>- instructs site operatives to adapt their practice in line with the solutions/policies in place to achieve sustainability objectives including BREEAM compliance</li> </ul> </li> </ul> <p>Many Advisory Professionals also hold an Assessor qualification and may perform both roles in a project. This is permitted so long they identify and manage potential conflicts of interests to BRE.</p> 

### Qualification, Status and Remaining Competent

To achieve qualified AP status, an individual must attend the appropriate scheme AP training course and pass the corresponding exams. The BRE Academy offers a course with content that supports the preparation for the competency assessment.

Advisory Professionals are:

- Formally recognized for their competency in applying the designated BREEAM program
- Publicly listed by BRE Global as a licensed Assessor on [www.GreenBookLive.com](http://www.GreenBookLive.com) and [BREEAM Projects](#)
- Permitted to use the badges of recognition to confirm formal association with the BREEAM programs.



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Maintaining the AP qualified status and competency requires:

- Meeting annual Continuing Professional Development requirement to maintain knowledge
- Complying with the Advisory Professional Code of Conduct

## Finding your Professional

To find a licensed Assessor or Advisory Professional for your project please visit [tools.breeam.com](https://tools.breeam.com).

To find out more about the qualification process for each role, please visit [www.breeam.com/engage/breeam-training/](https://www.breeam.com/engage/breeam-training/).

## Further Information

If you would like to learn more about the various BREEAM schemes, please visit [www.breeam.com/discover/technical-standards/](https://www.breeam.com/discover/technical-standards/) where a technical standard finder can be used to find the appropriate scheme for your project and location.

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