

Open Awards Level 3 End-point Assessment for

ST0161 Energy Manager

Ofqual: 610/7876/1

Contents

Contents	2
Version History	3
Transition arrangements	4
Occupational Overview	5
Standard Information	6
Entry Requirements.....	6
End-point Assessment Documents Overview	7
Gateway Requirements	10
Technical Report Proposal	10
Portfolio	10
Portfolio Content and Structure	11
Portfolio Submission	12
Identification Checks	12
Assessment	13
Assessment Preparation	13
Order of Assessments and scheduling	13
Assessment Window and result notification	13
Technical report and presentation with questions	13
Technical report and presentation materials	14
Delivery	15
Permitted Use of Artificial Intelligence	15
Assessment Timings	15
Technical report and presentation with questions - Grading Descriptors	16
Technical report and presentation with questions - Knowledge, Skills and Behaviours	18
Interview with underpinning portfolio of evidence	19
Delivery	20
Permitted Use of Artificial Intelligence	21
Assessment Timing	21
Interview with underpinning portfolio of evidence - Grading Descriptors	22
Interview with underpinning portfolio of evidence - Knowledge, Skills and Behaviours	23

Grading	25
Technical report and presentation with questions	25
Interview with underpinning portfolio of evidence	25
Overall grade.....	25
Resits and Retakes	26
Quality assurance	27
Independent Assessor Standard Requirements	27
Internal quality assurance	27
External quality assurance	27
Assessment Specification & Indicative Content	28
Mapping of Knowledge, Skills, and Behaviours.....	28
Open Awards Policies.....	59
Support	59

Version History

Version	Date	Change(s) made	Section(s)	Publication source(s)
1		New document.	All	Development Team

This EPA Handbook is for apprentices, employers and providers. It provides an overview of the end-point assessment, the assessment methods, the grading criteria etc. It is a reference document which will guide you through each stage of the process.

Transition arrangements

The version of the standard that this Handbook covers is v1.2. This standard is now called 'Energy manager' rather than 'Junior Energy Manager' but it is the latest version of the same standard (i.e., ST0161). There is a separate handbook for those learners registered on the 'Junior Energy Manager' version of the standard.

The transition arrangements outlined below describe how Open Awards will manage the move from ST0161 Junior Energy Manager v1.1 to ST0161 Energy Manager v1.2. These arrangements ensure that apprentices are assessed against the correct version of the Standard and Assessment Plan, while maintaining consistency, fairness, and regulatory compliance.

These arrangements apply to:

- Apprentices registered on ST0161 Junior Energy Manager v1.1
- Apprentices registered on ST0161 Energy Manager v1.2
- Employers, training providers, and assessors involved in the delivery and assessment of ST0161 during the transition period.

Management of assessment versions:

- Apprentices who are registered on ST0161 Junior Energy Manager v1.1 will continue to be assessed against the corresponding assessment plan version for that Standard; latest start date is 23/03/2025.
- Apprentices who are registered from the implementation date will be registered on and assessed against ST0161 Energy Manager v1.2; earliest start date for registration on this version is 24/03/25.
- Open Awards will maintain parallel assessment arrangements during the approved overlap period to support delivery of both Standards where required.

In line with current apprenticeship funding rules, apprentices already engaged on an earlier version of a standard may transfer to the latest version of the same standard (i.e., where the ST number remains the same)¹. If the apprentice is already registered with Open Awards, the provider must inform Open Awards when the apprentice has transferred to the newer version.

For further information about assessment of apprenticeship standards Open Awards offers please contact enquiries@openawards.org.uk

¹ Apprentices are NOT permitted to move back to a previous version of the same standard once they have moved to a new version.

Occupational Overview

This occupation is found in various sectors and industries including but not limited to construction, engineering, manufacturing, healthcare, government and public sectors, education, hospitality, property management, utilities, energy service companies and renewable energy companies.

The role of an energy manager is versatile and can be found in any industry or sector where energy consumption and efficiency requires dedicated management.

The broad purpose of the occupation is to perform roles in supporting an organisation to meet energy and cost reduction objectives and targets within the context of wider sustainability commitments such as carbon and water management and corporate social responsibility.

An energy manager will undertake a mix of technical, analytical, and administrative tasks aimed at improving energy efficiency and reducing costs.

They will support the development and implementation of energy management strategies to improve energy efficiency, reduce costs, and minimise environmental impact within an organisation.

In their daily work, an employee in this occupation interacts with utility suppliers, facilities managers, technical managers, facilities management supervisors, engineers and general building users.

An employee in this occupation will be responsible for assessing and measuring energy consumption within their organisation, this involves analysing energy usage patterns, identifying inefficiencies, and proposing improvements, benchmarking energy consumption against best practice guideline. Energy Managers address technical and operational energy management issues and work to optimise energy use in facilities, equipment, and processes. They contribute to the development, coordination implementation of energy management strategies and policies within their organisation.

Energy managers stay informed about energy-related regulations and legal requirements. They will regularly report on the organisation's energy performance. Involving tracking energy consumption, cost savings, and progress toward energy reduction targets. An energy manager will carry out site inspections and complete energy surveys, collect energy monitoring data and keep accurate records. They will also be developing solutions for carbon management

In addition, an energy manager may also be involved in supporting the delivery of measures supporting the organisations decarbonisation strategy and targets. They may also be responsible for improving data around the organisation's utility infrastructure.

Standard Information

Level: 3

Reference: ST0161

Approved for delivery: 1st December 2015 (updated to v1.2 on 29/05/25).

Route: Construction and the built environment

Minimum duration to gateway: 8 months (this does not include the EPA period).
Typically duration to Gateway is 24 months.

Employers involved in creating the standard: The Energy Managers Association, Waterwise Ltd, Planet First Ltd, Whitbread Plc, Pinsent Masons LLP, Heelec Ltd, Voyage Control Ltd, Tivarri Ltd, Parker Bromley Energy Ltd, Siemens Plc.

Professional recognition: This apprenticeship is not aligned to professional recognition.

However, in completing this apprenticeship, an apprentice will have shown the environmental knowledge and competence to be eligible for the Society for the Environment (SocEnv) professional registration. Apprentices are eligible for a shortened route to this registration, gaining the post-nominals of Registered Environmental Technician (REnvTech) and the benefit of that credibility.

External Quality Assurance Provider: Ofqual

Entry Requirements

There are no set entry requirements to become an Energy Manager. Employers usually expect good literacy, numeracy, and IT skills, along with good communication and customer service skills, as well as an aptitude for problem-solving.

End-point Assessment Documents Overview

An overview of the main documents and supporting materials you will encounter during this end-point assessment is in the table below.

Document Name	Brief Description	Who Should Read this Document	When To Use this Document	Additional Information
Skills Scan	This document is designed to support employers and providers to ensure that an apprentice's job role meets the requirements of the standard.	Employers Providers	Use this during the decision making process when considering whether the EPA is appropriate for the apprentice.	This allows employers and providers to ensure that the EPA is a good fit for the skills and aspirations of the apprentice.
Apprentice EPA Journey	A one page visual overview of the different milestones the apprentice will reach within their EPA journey.	Apprentices Employers Providers	Before committing to the course to make sure it is the right fit for you. Throughout the EPA journey.	This roadmap will help you to understand what has been achieved so far and what still needs to be completed.
EPA Handbook	This provides an overview of the end-point assessment, the assessment methods, the grading criteria etc. It is a reference document which will guide you through each stage of the process.	Apprentices Employers Providers	During the apprenticeship as a reminder of the expectations, assessment methods and grading.	This is a key document which will help you to navigate your way through each step of the end-point assessment. Refer back to this frequently.
Progression Tracker	This allows the employer to compile and	Apprentices Employers	Throughout the EPA prior to gateway.	This document could be a valuable basis

	record an evidence base to prove that the apprentice has demonstrated competence against each KSB specified in the assessment plan.	Providers		for discussions around progress that the employer may have with the apprentice.
Portfolio Referencing Matrix (also criteria / evidence mapping sheets)	This gives you an overview of the Portfolio of Evidence requirements. It also includes a declaration for the apprentice and the employer to sign.	Apprentices Employers Providers	When you submit the Portfolio of Evidence to support the Interview at gateway.	If this document is not signed and submitted the apprentice will not be able to enter gateway.
Preparation for the Technical report and presentation with questions	This gives you a brief reminder of how to prepare for the technical report and presentation with questions and the KSBs that will be assessed through this assessment method.	Apprentices Employers Providers	When preparing for your technical report and presentation with questions	The grading descriptors will help apprentices to identify areas you may need to work on.
Preparation for the Interview with underpinning portfolio of evidence	This gives you a brief reminder of how to prepare for the interview with underpinning portfolio of evidence and the knowledge and behaviours that will be assessed.	Apprentices Employers Providers	When preparing for your interview.	The grading descriptors may help you to complete a self-assessment whilst preparing for the interview.

Gateway Authenticity and Declaration form	This form declares that the apprentice is ready for gateway, the gateway conditions have been met and the evidence submitted has been produced by the apprentice.	Apprentices Employers Providers	At gateway.	This form needs to be signed by employers, providers and the apprentice. The apprentice is unable to enter gateway until this form has been completed and submitted.
Technical report proposal form (of up to 500 words)	This proposal must show that the technical report will provide the opportunity for the apprentice to cover the KSBs mapped to this assessment method.	Apprentices Employers Providers	At gateway.	The technical report proposal is not assessed. Open Awards will sign-off the technical report's title and scope at the gateway to confirm it is suitable.

Gateway Requirements

The training provider must provide Open Awards with the following evidence to enable us to approve the gateway.

- Apprentices must have completed the minimum apprenticeship on-programme duration (eight (8) months from the start date)
- Achievement of English and mathematics qualifications in line with the apprenticeship funding rules
- Apprentices have completed the minimum volume of off-the-job training hours
- Fully completed and signed Portfolio Referencing Matrix form
- Portfolio of evidence typically containing 10 discrete pieces of evidence, mapped against the KSBs
- Fully completed and signed Gateway Authenticity Declaration form
- Fully completed Technical Report Proposal form.

Technical Report Proposal

Apprentices on this standard are required to submit a technical report proposal of up to 500 words (maximum) for the Technical report and presentation with questions. The proposal must show that the technical report will provide the opportunity for the apprentice to cover the KSBs mapped to this assessment method. The technical report proposal is not assessed; however, Open Awards must review and confirm the technical report's title and scope at the gateway to confirm it is suitable.

Where this 500 word maximum limit is exceeded, the proposal will be returned by Open Awards to the apprentice, via the training provider, for amendment and subsequent resubmission. This resubmission will not be considered as an assessment attempt and therefore, resubmission of the proposal will not constitute either a resit or retake of the technical report and presentation with questions assessment.

However, this will delay completion of the gateway checks. Therefore, training providers and employers are encouraged to ensure the proposal requirements are met before submission at gateway.

Portfolio

Apprentices on this standard are required to develop and submit a portfolio of evidence related to the KSBs that will be assessed by the Interview with underpinning portfolio of evidence. The portfolio must be submitted to Open Awards alongside other gateway evidence. Open Awards preferred format is an electronic portfolio either uploaded by the training provider to the Open Awards Secure Portal, or else a login provided to enable Open Awards to access the portfolio. Training

providers should contact Open Awards to discuss alternative arrangements, e.g., where a paper-based or mixed portfolio is developed.

Apprentices should select their best possible evidence to reflect their current level of proficiency against the standard at the point they undertake their interview. The portfolio is not assessed and will only be used to support the interview; feedback will not be provided on the portfolio. However, where the content requirements below are not met, or the evidence not authenticated as being valid and attributable to the apprentice, the portfolio will be returned by Open Awards to the apprentice, via the training provider, for amendment and subsequent resubmission. This resubmission will not be considered as an assessment attempt and therefore, resubmission of the portfolio will not constitute either a resit or retake of the assessment interview.

However, this will delay completion of the gateway checks. Therefore, training providers and employers are encouraged to ensure the portfolio requirements are met before submission at gateway.

Open Awards have developed supporting evidence tracking documentation to support apprentices, training providers and employers meet the portfolio content requirements set out in the assessment plan. This documentation is available from the Open Awards Secure Portal.

Portfolio Content and Structure

The portfolio must contain evidence related to the KSBs that will be assessed by the interview.

It will typically contain 10 discrete pieces of evidence which should be mapped against the KSBs. Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested.

Evidence sources may include:

- workplace documentation/ records
- witness statements
- annotated photographs
- video clips (maximum total duration 10 minutes); the apprentice must be in view and identifiable
- feedback from colleagues and/or clients.

This is not a definitive list; other evidence sources are possible. However, the portfolio should NOT include reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance (for example witness statements) rather than opinions. The evidence provided must be valid and attributable to the apprentice; the portfolio of evidence must contain an

authenticity statement from the employer and apprentice confirming this. Mock assessment activities are NOT considered acceptable evidence to be included within the portfolio.

Portfolio Submission

The portfolio must be submitted at gateway alongside the gateway evidence. Because the portfolio must be completed as a gateway requirement, all evidence must be generated and dated pre-gateway. No post-gateway dated evidence can be included as it will be considered invalid.

Where invalid evidence is included within the portfolio, the content requirements are not met, or the evidence is not authenticated, the portfolio will be returned by Open Awards to the apprentice, via the training provider, for amendment and subsequent resubmission.

Identification Checks

Open Awards requires the apprentice to present photographic identification to an Open Awards independent assessor (IA) immediately prior to each assessment on each assessment day. This is a requirement to ensure Open Awards can confirm an individual completing an assessment is the person they are claiming to be.

The following are acceptable forms of evidence of an apprentice's identification:

- a valid passport (any nationality)
- a signed UK photo card driving licence
- valid warrant card issued by HM Forces or the Police
- other photographic ID card, e.g., employee ID card (must be current employer), student ID card, travel card
- UK biometric residence permit.

Where this identification is not available to be checked, the assessment will NOT be allowed to commence.

Where an apprentice does not have access to the necessary identification or where the name on the identification does not match the name registered with Open Awards, the training provider must contact Open Awards in advance to make arrangements for alternative or additional authentication checks to be made.

Assessment

The ST0161 end-point assessment (EPA) consists of two (2) assessment methods:

- Technical report and presentation with questions
- Interview with underpinning portfolio of evidence.

Assessment Preparation

Support materials are available on the Open Awards Secure Portal to help prepare apprentices for their assessments. These materials will also support training providers and employers post-gateway to ensure apprentices are well prepared for their EPA experience. They are not intended to be used to measure proficiency pre-gateway or to support gateway decisions. Training providers can access these materials through the Secure Portal.

Order of Assessments and scheduling

The assessment methods can be delivered in any order. The result of one assessment method does not need to be known before starting the next.

This assessment component should be booked and confirmed with the IA in advance, via Open Awards. Any adaptations required to plans for the assessment should be agreed with Open Awards at gateway.

Providers are required to schedule their apprentices no later than 10 working days prior to the desired date and time of the assessment. Assessments are scheduled via Open Awards Secure Portal.

Assessment Window and result notification

Both assessments must be passed within a typical EPA period of four (4) months from Open Awards approving the gateway.

Result notification will be after internal quality assurance activities have been completed, and normally 10 working days of the assessment taking place via the EPA Section of Open Awards' Secure Portal.

Notification may be delayed to enable additional internal quality assurance checks, such as malpractice investigation.

Technical report and presentation with questions

This assessment method involves the apprentice completing a significant and defined piece of work that has a real business application and benefit. This process

may include for example, research, analysis and the completion of tasks or activities to achieve the outcome. The assessment method will have an output at the end of the defined piece of work. The work completed for the technical report and presentation with questions assessment method must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship.

The assessment then involves an IA observing the apprentice completing their presentation and then asking questions about the report and presentation. Apprentices will be provided with both written and verbal information about the presentation process, before the start of the assessment.

This assessment method has two (2) components:

- technical report
- presentation with questions.

Technical report and presentation materials

The apprentice must complete and submit the technical report and/ or any presentation materials to Open Awards by the end of week eight (8) of the EPA period (i.e., by the end of eight (8) weeks after gateway checks have been confirmed as successfully completed).

If the apprentice does not meet this deadline for the submission of the technical report and presentation materials, this will result in a fail for the assessment method. Apprentices will subsequently be required to resubmit their technical report and presentation materials and the assessment considered as a resit or retake.

The exception is where a successful application has been made for either a reasonable adjustment or special consideration. This may be for a variety of reasons, including but not limited to a known learning difficult or special considerations. For full information visit please refer to the Open Awards [Reasonable Adjustments and Special Considerations](#) policy on our website.

The submitted technical report must have a word count of 3000 words. A tolerance of 10% above or below is allowed at the apprentice's discretion (i.e., the report must be between 2700 (minimum) words and 3300 (maximum) words). Appendices, references and diagrams are not included in this word count. The apprentice must produce and include a mapping in an appendix, showing how the report evidences the KSBs mapped to this assessment method.

Any submitted report that is above or below the 10% word count tolerance will NOT be assessed; this will result in a fail for the assessment method. Apprentices will

subsequently be required to resubmit their report which will be considered as a resit or retake.

Delivery

The presentation with questions must be conducted on a 1:1 basis in a controlled environment free from distraction or influence.

The presentation with questions component will normally be undertaken remotely using video conferencing (e.g., MS Teams or Zoom) under controlled conditions. The assessment may be recorded for quality assurance purposes; any recording will be stored and deleted in line with Open Awards Data Retention Policy and associated procedures.

Where recording is not possible or practicable, alternative arrangements may be implemented to enable quality assurance of the assessment if required. Face-to-face in-person assessment will only take place following a request from the provider, subject to agreement in advance with Open Awards and appropriate controls being in place.

Open Awards will give the apprentice two (2) weeks' notice of the presentation with questions. The IA must have at least two (2) weeks to review the report and presentation materials, to allow them to prepare questions.

As the presentation with questions component only involves the apprentice and the IA, neither the employer nor provider are able to attend. Where other individuals are required to attend (e.g., for quality assurance purposes), the apprentice will be given reasonable advance notice.

Permitted Use of Artificial Intelligence

Where artificial intelligence (AI) is used by an apprentice as part of their normal work activities and thus contributed to the technical report and/ or presentation, this must be disclosed to the IA. The apprentice must clearly acknowledge this within the report and/ or the presentation, show the name of the AI used, state how the AI was used and the date the resulting evidence was generated.

Assessment Timings

The presentation with questions component must last **35 minutes**. This will typically include a presentation of **15 minutes** and questioning lasting **20 minutes**.

The IA will ask a minimum of **five (5)** competence-based questions, taken from the question bank provided by Open Awards. The IA will use the full time available for questioning and can increase the time of the presentation with questions by up to 10%, to allow the apprentice to complete their last point or respond to a question if necessary.

The IA will not tell the apprentice in advance of the assessment how much additional time may be available. Therefore, the apprentice should not assume any additional time will be available and will be informed they should not assume any additional time may be available.

The apprentice may choose to end this assessment component early. In this scenario they must be confident that they have demonstrated the KSBs allocated to the presentation with questions. The IA will confirm and document that the apprentice understands the implications of ending the assessment early. Whether the apprentice chooses to finish early or to the time allocated, it will not be indicative of the grade they will receive. For example, if an apprentice finishes early, it will not necessarily restrict their grade to a pass. Grading is based on the apprentice's performance across both components (i.e., the technical report and the presentation with questions) against the relevant grading descriptors.

The IA will not suggest or choose to end the assessment early, unless there is an emergency. However, the IA may suggest that the assessment continues where there is no danger to the health, safety or wellbeing of either themselves or the apprentice, but to ensure that the apprentice has the opportunity to complete the assessment and is not disadvantaged in the assessment ending early.

Pass and Distinction grading descriptors for the technical report and presentation with questions are in the following table:

Technical report and presentation with questions - Grading Descriptors

Theme KSBs	Pass Grading Descriptors	Distinction Grading Descriptors
Planning K2 K8 K21 S2 S6 S17	Complies with energy management related policies, procedures, processes, standards, specifications and codes of practice to meet the needs of the technical report. (K2, S2) Plans and prioritises own work to meet the timelines of the technical report. (K8, S6) Interprets and extracts information from sources to meet the needs of the technical report. (K21, S17)	None
Health and safety K3 K4 S3 S4 B1	Prioritises health and safety for themselves and others by applying safe-working	None

Theme KSBs	Pass Grading Descriptors	Distinction Grading Descriptors
	practices, including risk assessments, method statements, control measure application and safe systems of work, and follows health and safety regulations and procedures to meet the needs of the technical report. (K3, K4, S3, S4, B1)	
Analysing energy systems and performance K11 K15 K16 S8 S12	Collects, stores, analyses, monitors and reports energy performance data in line with organisational guidelines and to meet the needs of the technical report. (K11, K15, K16, S8, S12)	Critically analyses energy performance data in line with organisational guidelines and to meet the needs of the technical report. (K16, S12)
Problem solving and identifying solutions K6 K10 K19 K28 S7 S15 S22	Applies problem solving techniques to identify improvements, and repairs or replacements, to energy systems or processes that reduce energy consumption and meet the needs of the technical report. (K6, K10, K19, K28, S7, S15, S22)	Justifies their identified solutions for improvements, and repairs or replacements, to energy systems or processes that reduce energy consumption and meet the needs of the technical report. (K19, S7, S15)
Technical reporting K24 K29 K30 S23 S24 S26	Applies technical report writing techniques and principles of feedback to communicate their technical advice using industry specific terminology to meet the needs of the technical report. (K24, K30, S24, S26) Communicates verbally when presenting their technical report using industry specific terminology and adapts their style to the audience. (K29, S23)	Justifies the technical report writing techniques and principles of feedback they have applied and their use of industry specific terminology to communicate in writing. (K24, K30, S24, S26)
Implementation K5 K17 S5 S13 B2	Implements energy management and decarbonisation strategies, policy or plans, applying sustainability principles and	Identifies improvements to how energy management and decarbonisation strategies, policy or plans could be implemented or how

Theme KSBs	Pass Grading Descriptors	Distinction Grading Descriptors
	techniques to meet the needs of the technical report. (K5, K17, S5, S13, B2)	sustainability principles and techniques could be applied to meet the needs of the technical report. (K5, K17, S5, S13)
Utilities usage K18 S14	Identifies, monitors and analyses the usage of utilities and their emissions to meet the needs of the technical report. (K18, S14)	Critically analyses the usage of utilities and their emissions to meet the needs of the technical report. (K18, S14)

Technical report and presentation with questions – Knowledge, Skills and Behaviours

Ref	Statement
Knowledge	
K2	Energy related policies procedures, processes, standards, specifications and codes of practice.
K3	Health and safety regulations and procedures, relevance to the occupation.
K4	Safe-working practices including risk assessments, method statements, control measure application and safe systems of work.
K5	Current and developing sustainability principles and techniques.
K6	Energy resource management considerations: cost, quality, safety, security, society and environmental impact.
K8	Planning, prioritising, work scheduling and time management techniques.
K10	Energy systems and processes and the principles of reducing energy consumption.
K11	Data collection, storage and reporting methods and techniques.
K15	Principles of energy baselines and the variables that affect energy consumption.
K16	Energy performance monitoring and analysis: techniques, processes, systems and equipment. Factors affecting energy use, efficiency and inefficiency.
K17	Principles of developing and implementing strategies, policies and plans for energy management and decarbonisation.
K18	Techniques to identify, monitor and analyse utilities usage and their emissions.
K19	The principles and requirements of repairs, replacements and improvements related to energy system infrastructure and processes.
K21	Methods of interpreting and extracting relevant information from sources such as manufacturer's instructions, drawings, plans, specifications, and previous reports.

K24	Principles of providing feedback to improve the quality of energy management.
K28	Problem solving techniques.
K29	Verbal communication techniques. Giving and receiving information. Adapting style to audience. Barriers in communication and how to overcome them. Specific terminology.
K30	Written communication techniques. Plain English principles, specific terminology and technical report writing.
Ref	Statement
Skills	
S2	Comply with energy management related policies, procedures, processes, standards, specifications and codes of practice.
S3	Follow health and safety regulations and procedures.
S4	Apply safe-working practices: risk assessments, method statements control measures and safe systems of work.
S5	Apply sustainability principles and techniques.
S6	Plan and prioritise own work.
S7	Identify improvements to systems and process that reduce energy consumption.
S8	Collect, store and report data.
S12	Analyse and monitor energy performance data.
S13	Implement energy management and decarbonisation strategies, policy or plans.
S14	Identify, monitor and analyse usage of utilities and their emissions.
S15	Identify options for repairs or replacements related to energy system infrastructure.
S17	Interpret and extract information from sources such as manufacturer's instructions, drawings, plans, specifications, or previous reports.
S22	Apply problem solving techniques.
S23	Communicate verbally using industry specific terminology.
S24	Communicate in writing using industry specific terminology.
S26	Apply technical reporting writing techniques.
Ref	Statement
Behaviours	
B1	Prioritise health and safety for themselves and others.
B2	Contribute towards a sustainable workplace.

Interview with underpinning portfolio of evidence

In this assessment method, the apprentice and the Independent Assessor (IA) will have a structured dialogue, allowing the apprentice to evidence the KSBs assigned to this assessment method and draw on appropriate evidence from their portfolio to underpin the interview. Apprentices can refer to and illustrate their answers with

evidence from their portfolio of evidence, however the portfolio of evidence is not directly assessed.

Apprentices will be provided with both written and verbal information about the interview process, before the start of the assessment.

Delivery

The interview must be conducted on a 1:1 basis in a controlled environment free from distraction or influence.

The presentation with questions component will normally be undertaken remotely using video conferencing (e.g., MS Teams or Zoom) under controlled conditions. The assessment may be recorded for quality assurance purposes; any recording will be stored and deleted in line with Open Awards Data Retention Policy and associated procedures.

Where recording is not possible or practicable, alternative arrangements may be implemented to enable quality assurance of the assessment if required. Face-to-face in-person assessment will only take place following a request from the provider, subject to agreement in advance with Open Awards and appropriate controls being in place.

Open Awards will give an apprentice two (2) weeks' notice of the interview. The independent assessor must have at least two (2) weeks to review the supporting documentation.

As the interview only involves the apprentice and the IA, neither the employer nor provider are able to attend. Where other individuals are required to attend (e.g., for quality assurance purposes), the apprentice will be given reasonable advance notice.

The IA will ask a minimum of **eight (8)** competence-based questions, taken from the question bank provided by Open Awards. The purpose is to assess the apprentice's competence against the following themes:

- energy management profession
- energy auditing
- quality assurance
- information technology and digital
- team working and communication

In addition to these questions, the IA may use follow-up or drill-down questions to clarify aspects of the apprentice's answers to competence-based questions, or following their review of the apprentice's portfolio of evidence.

Permitted Use of Artificial Intelligence

The use of AI is not permitted within the interview. Apprentices are assessed under controlled conditions and are not permitted to use the internet, other than for video conferencing, during the interview. Apprentices must answer from their own knowledge, skills and behaviours gained during the apprenticeship.

Where apprentices wish to include 'live' evidence within their portfolio and refer to this during the assessment (e.g., worksite live streaming), they must provide the independent assessor with appropriate access and guidance so this evidence can be reviewed in advance, so it's application can be discussed during the assessment.

Where AI has been used as part of their practical period, and the evidence is presented as part of the portfolio of evidence, this must be clearly identified through the apprentice's authenticity statement.

Assessment Timing

The interview with underpinning portfolio of evidence will last for **45 minutes**. The independent assessor has the discretion to increase the timing of the interview by up to 10% to allow the apprentice to complete their response to a question.

The assessor will not tell the apprentice in advance of the assessment how much additional time may be available. Therefore, the apprentice should not assume any additional time will be available and will be informed they should not assume any additional time may be available.

The apprentice may choose to end this assessment method early. In this scenario they must be confident that they have demonstrated the KSBs allocated to the interview. The IA must ensure the apprentice is fully aware of all the assessment requirements and confirm and document that the apprentice understands the implications of ending the assessment early. Whether the apprentice chooses to finish early or to the time allocated, it will not be indicative of the grade they will receive. For example, if an apprentice finishes early, it will not necessarily restrict their grade to a pass. Grading is based on the apprentice's performance against the relevant grading descriptors.

The IA will not suggest or choose to end the assessment method early, unless there is an emergency. However, the IA may suggest that the assessment continues where there is no danger to the health, safety or wellbeing of either themselves or the apprentice, but to ensure that the apprentice has the opportunity to complete the assessment and is not disadvantaged in the assessment method ending early.

Pass and Distinction grading criteria for the Interview with underpinning portfolio of evidence are in the following table:

Interview with underpinning portfolio of evidence - Grading Descriptors

Theme KSBs	Pass Grading Descriptors	Distinction Grading Descriptors
Energy management profession K1 K7 K9 S1 B6	Explains how they act professionally and comply with energy regulations and legislation relevant to their role. (K1, S1, B6) Outlines project management techniques used in the energy management profession. (K7) Outlines how various energy sources affect the transition to net zero. (K9)	Explains the impact on their employer of energy regulation and legislation compliance and non-compliance. (K1, S1)
Energy auditing K12 K13 K14 S9 S10 S11 B7	Describes how they apply energy and water assessment and audit techniques, adapting and responding to work demands and situations relevant to their role. (K12, S9, B7) Explains how they read, collect and record metered data, and analyse utility bills to meet the needs of the task. (K13, K14, S10, S11)	Explains the benefits to their employer and stakeholders of energy and water assessments and audits. (K12, S9)
Quality assurance K20 S16	Describes how they apply quality assurance procedures to meet the needs of the task. (K20, S16)	None
Information technology and digital K22 K23 S18 S19 B5	Describes how they act ethically using information technology and digital systems to monitor energy use, in line with GDPR and cyber security regulations and policies. (K22, K23, S18, S19, B5)	Outlines the benefits to their employer and stakeholders of ensuring GDPR and cyber security regulations and policies are followed. (K23, S19)
Team working K25 K26 K27 K31 S20 S21 S25 B3 B4	Describes how they collaborate with others and support equity, diversity and inclusion when applying team	Explains the benefits of supporting a diverse and inclusive culture for their employer. (K25, S20)

Theme KSBs	Pass Grading Descriptors	Distinction Grading Descriptors
	working principles. (K25, K26, S20, S21, B3, B4) Outlines mental health awareness and personal wellbeing relevant to their role. (K27) Explains how they recognise the limitations of their role, seek input from others, and escalate issues when required to achieve the task. (K31, S25)	

Interview with underpinning portfolio of evidence - Knowledge, Skills and Behaviours

Ref	Criteria
Knowledge	
K1	Awareness of regulations and legislation that impact the energy management.
K7	Awareness of project management techniques.
K9	Awareness of how various energy sources affect the transition to net zero.
K12	Energy and water assessment and auditing principles and techniques.
K13	Meter reading techniques: reading, collecting and recording data.
K14	Principles of utility procurement, billing, tariff, supplier query and negotiations.
K20	Quality assurance procedures.
K22	Principles and use for using information technology and digital systems to monitor energy use.
K23	General Data Protection Regulation (GDPR). Cyber security.
K25	Principles of equity, diversity, and inclusion in the workplace. Unconscious bias.
K26	Team working and collaboration principles.
K27	Personal wellbeing and mental health awareness.
K31	When to escalate tasks and issues, and to whom.
Ref	Criteria
Skills	
S1	Comply with energy regulations and legislation.
S9	Apply energy and water assessments and audit techniques.
S10	Read, collect and record metered data.
S11	Analyse utility bills.
S16	Apply quality assurance procedures.
S18	Use information technology and digital systems to monitor energy use.

S19	Comply with GDPR and cyber security regulations and policies.
S20	Apply policies and practices to support equality, diversity and inclusion.
S21	Apply team working principles.
S25	Recognise limitations of their role, seek input from others and escalate issues when required.
Ref	Criteria
Behaviours	
B3	Contributes to equity, diversity, and inclusivity workplace culture.
B4	Collaborate with others.
B5	Act ethically.
B6	Act professionally.
B7	Respond and adapt to work demands and situations.

Grading

Technical report and presentation with questions

- If one or more pass grading descriptors are not met, the assessment will be graded as a fail.
- To achieve a pass, **all** pass criteria must be met.
- To achieve a merit, a **pass** in one method and a **distinction** in the other must be met.
- To achieve a distinction, **all** distinction criteria in **both** methods must be met.

Interview with underpinning portfolio of evidence

- If one or more pass grading descriptors are not met, the assessment will be graded as a fail.
- To achieve a pass, **all** pass criteria must be met.
- To achieve a merit, a **pass** in one method and a **distinction** in the other must be met.
- To achieve a distinction, **all** distinction criteria in **both** methods must be met.

Overall grade

The grades from individual assessment methods will be combined in the following way to determine the overall grade:

Technical report and presentation with questions	Interview with underpinning portfolio of evidence	Overall grading
Fail	Any Grade	Fail
Any Grade	Fail	Fail
Pass	Pass	Pass
Pass	Distinction	Merit
Distinction	Pass	Merit
Distinction	Distinction	Distinction

Resits and Retakes

Apprentices who fail one or more assessment methods will be offered the opportunity to take a resit or a retake. Open Awards will provide feedback alongside the result notification to all apprentices who fail an assessment method. This feedback will be provided via the training provider, normally **within ten (10) working days** of the assessment taking place.

If the apprentice fails the technical report with presentation and questions assessment method, they may amend the technical report in line with the IAs feedback. The apprentice will be able to rework and submit their amended technical report. They will then reattempt the 'presentation with questions' assessment component to ensure the Technical report and presentation with questions assessment method has been completed again in full. Upon receiving booking of the resit or retake, Open Awards must give the apprentice two (2) weeks' notice of the resit or retake date for the presentation with questions component.

Resits or retakes are only to be taken in the event that the original assessment grade is a fail. A resit or retake cannot be taken with the intention of increasing the original grade if an apprentice has passed their EPA. Therefore, feedback will not normally be provided to apprentices who achieve a pass or higher.

The apprentice will get a maximum EPA grade of a pass they need to resit or retake either or both assessment methods, unless Open Awards determines there are exceptional circumstances. Where an apprentice believes special circumstances impacted on their initial assessment attempt, they must submit a formal request with supporting evidence for special circumstances to be considered, directly to Open Awards **within five (5) working days** of receiving the assessment decision.

Failed assessment methods must be resat typically in a two (2) month timeframe or retaken within a four (4) month period from the EPA outcome notification, otherwise the entire EPA will need to be resat or retaken in full.

Resits and retakes must be completed within six (6) months of the original assessment otherwise the entire EPA will need to be resat or retaken again.

Quality assurance

Independent Assessor Standard Requirements

IAs must meet the following criteria:

- have recent relevant experience of the occupation or sector to at least one level above the occupation gained in the last three years or significant experience of the occupation or sector

and meet the following minimum requirements:

- be competent to deliver the end-point assessment in line with the expectations stated in the assessment plan.

Internal quality assurance

Open Awards will complete quality assurance on assessments before results are released. Quality assurance is completed through observations and examination of documentation on a risk-based sampling model.

External quality assurance

External quality assurance for this apprenticeship standard is undertaken by Ofqual.

Assessment Specification & Indicative Content

The assessment specification can be found on Open Awards website and on Skills England's website in the published assessment plan for the standard. Details of which elements of the apprenticeship standard will be tested by each test are given below.

Indicative Content has been added under each KSB statement. This is to give examples of the expectations of an Energy Manager's role within each area.

Mapping of Knowledge, Skills, and Behaviours

Key:	
Technical report and presentation with questions	TPQ
Interview with underpinning portfolio of evidence	IPE

Ref	KSB to be assessed	Assessment Method
Knowledge		
K1	Awareness of regulations and legislation that impact the energy management.	IPE
An Energy Manager must possess a foundational understanding of the legal framework governing energy use. This includes knowledge of, for example: • Key UK and relevant EU energy efficiency directives and regulations (e.g., Energy Efficiency Directive, Minimum Energy Performance Standards). • Carbon reporting requirements (e.g., Streamlined Energy and Carbon Reporting - SECR, ESOS). • Building regulations and standards impacting energy performance in new and existing buildings (e.g., Part L of the Building Regulations). • Environmental permitting regulations as they relate to energy consumption and emissions. • Health & Safety legislation crossover (e.g., Electricity at Work Regulations linked to energy systems) (e.g., ensuring compliance during electrical inspections). • Energy taxation frameworks (e.g., Climate Change Levy, Carbon Price Floor) (e.g., calculating levy savings from energy efficiency improvements). • Upcoming legislative changes and their potential impact on energy management strategy. • Upcoming legislative changes and their potential impact on energy management strategy. • Penalties and enforcement mechanisms (e.g., ESOS non-compliance fines). • International agreements influencing UK energy law (e.g., Paris Agreement, COP outcomes) (e.g., integrating UN targets into corporate strategies).		
K2	Energy related policies procedures, processes, standards, specifications and codes of practice.	TPQ

Ref	KSB to be assessed	Assessment Method
	A comprehensive understanding of industry best practices and organisational guidelines is crucial. This covers for example: • National and international energy management standards (e.g., ISO 50001 Energy Management Systems, EN 16247 Energy Audits). • Organisational energy policies, procedures for energy data collection, and reporting processes. • Codes of practice for energy efficient design, operation, and maintenance of various plant and equipment. • Specific energy performance specifications for equipment and systems (e.g., for HVAC, lighting, motors). • Government and professional body guidelines (e.g., Energy Savings Opportunity Scheme guidance) (e.g., applying ESOS audit methodology). • Sector-specific energy efficiency guidelines or benchmarks. • Integration of policies with health, safety, and environmental systems (e.g., linking energy procedures with ISO 14001). • Procurement specifications for sustainable energy performance (e.g., embedding minimum energy efficiency in tenders). • Best practise guides from industry groups (e.g., Carbon Trust, BRE) (e.g., referencing Carbon Trust guidance on compressed air). • Corporate sustainability frameworks (e.g., internal ESG policies) (e.g., linking energy KPIs to ESG reporting).	
K3	Health and safety regulations and procedures, relevance to the occupation.	TPQ
	An Energy Manager must demonstrate a solid grasp of health and safety principles, specifically for example: • The Health and Safety at Work etc. Act 1974 and relevant associated regulations (e.g., Management of Health and Safety at Work Regulations, Electricity at Work Regulations). • Specific risks associated with energy systems (e.g., electrical hazards, working at height, confined spaces, pressure systems, hot surfaces). • Importance of risk assessments before energy tasks (e.g., reviewing RAMS before electrical testing). • The hierarchy of control measures for managing risks (eliminate, substitute, engineer, administrative, PPE). • Emergency procedures relevant to energy infrastructure. • Reporting procedures for accidents, incidents, and near misses. • Training requirements for safe energy work (e.g., mandatory electrical safety courses). • Responsibilities of duty holders under legislation (e.g., employer vs employee roles). • Link between energy systems and fire safety legislation (e.g., compliance with Fire Safety Act for energy storage systems). • Integration of H&S with energy audits (e.g., identifying unsafe plant during site assessments).	

Ref	KSB to be assessed	Assessment Method
K4	Safe-working practices including risk assessments, method statements, control measure application and safe systems of work.	TPQ
Practical knowledge of ensuring safety in energy-related tasks is essential, for example: • The purpose and process of conducting risk assessments to identify hazards and evaluate risks in energy projects and operations. • Applying appropriate control measures to mitigate identified risks (e.g., lockout/tagout procedures, personal protective equipment - PPE). • Developing and implementing clear method statements for complex or hazardous energy-related work. • Understanding and implementing safe systems of work (e.g., permits to work). • Hierarchy of documentation (risk assessment → method statement → PTW) (e.g., linked safety processes). • The importance of regular reviews and updates of safety documentation. • Role of supervisors in enforcing safe systems (e.g., signing off permits). • Monitoring compliance on-site (e.g., spot checks during retrofit projects). • Learning from incidents to improve safe systems (e.g., updating PTW after accident investigations). • Digital tools for risk management (e.g., using apps for electronic RA/MS)		
K5	Current and developing sustainability principles and techniques.	TPQ
An Energy Manager needs to be aware of the broader sustainability agenda, for example: • The concept of sustainable development and the triple bottom line (people, planet, profit). • Key global and national sustainability goals (e.g., UN Sustainable Development Goals, UK Net Zero targets). • Principles of circular economy and resource efficiency. • Techniques for life cycle assessment (LCA) of energy-related projects and products. • The role of renewable energy sources in achieving sustainability. • Green finance mechanisms supporting sustainability (e.g., green bonds for energy efficiency). • Circular procurement practices (e.g., specifying reusable or recycled equipment). • Social sustainability (fairness, wellbeing, inclusion) (e.g., community energy projects). • Biodiversity and natural capital considerations (e.g., ecological impact of renewable projects). • Developing trends (e.g., carbon offsetting, science-based targets) (e.g., corporate SBTi commitments).		
K6	Energy resource management considerations: cost, quality, safety, security, society and environmental impact.	TPQ
A holistic view of energy management requires understanding multiple facets of energy		

Ref	KSB to be assessed	Assessment Method
	resources, for example: • Safety: Inherent risks associated with energy generation, distribution, and consumption. • Security: Resilience of energy supply chains and infrastructure against disruption. • Quality: Reliability and stability of energy supply. • Cost: Capital expenditure (CapEx) and operational expenditure (OpEx) of different energy sources and efficiency measures. • Environmental Impact: Emissions (GHG, air pollutants), land use, water use, and resource depletion associated with energy production and use. • Society: Social implications of energy choices, including energy poverty and community engagement. • Balancing trade-offs between cost and sustainability (e.g., higher CapEx renewables with lower long-term OpEx). • Understanding embedded carbon and supply chain impacts (e.g., embodied energy in building materials). • Stakeholder perspectives on energy resource choices (e.g., investor focus on ESG metrics). • Future-proofing against policy and market risks (e.g., carbon pricing impacts).	
K7	Awareness of project management techniques.	IPE
	While not a full project manager, an Energy Manager needs to understand project fundamentals, for example: • Project lifecycle stages (initiation, planning, execution, monitoring & controlling, closure). • Resource allocation, budgeting, and risk management in a project context. • Basic project planning tools (e.g., Gantt charts, critical path analysis). • Stakeholder engagement and communication strategies for projects. • Monitoring project progress and identifying deviations from the plan. • Risk registers and mitigation planning (e.g., recording supply chain risks). • Agile vs Waterfall methodologies (e.g., phased retrofit delivery vs agile pilot projects). • Lessons learned processes (e.g., documenting outcomes after an ESOS audit project). • Use of project management software (e.g., MS Project, Asana). • Integration with organisational governance (e.g., stage-gate approvals).	
K8	Planning, prioritising, work scheduling and time management techniques.	TPQ
	Effective self-management and workload organisation are key for an Energy Manager, for example: • Methods for setting SMART (Specific, Measurable, Achievable, Relevant, Time-bound) objectives.	

Ref	KSB to be assessed	Assessment Method
	- Techniques for prioritising tasks (e.g., Eisenhower Matrix, urgent/important). - Developing realistic work schedules and managing deadlines effectively. - Tools and strategies for time management (e.g., Pomodoro Technique, time blocking). - Understanding the impact of unforeseen circumstances on schedules and adapting plans accordingly. - Delegation of tasks effectively (e.g., assigning data collection to junior staff). - Regular progress reviews (e.g., weekly planning sessions). - Balancing reactive vs proactive work (e.g., handling emergencies while pursuing long-term goals). - Prioritising high-value activities (e.g., focusing on projects with quickest ROI). - Using digital tools to improve scheduling (e.g., Outlook calendars, Trello).	
K9	Awareness of how various energy sources affect the transition to net zero.	IPE
A forward-looking perspective on energy transitions is vital, for example: - The concept of net zero emissions and its implications for energy policy and technology. - The role of fossil fuels (coal, oil, gas) and their associated emissions. - The characteristics and role of renewable energy sources (solar, wind, hydro, geothermal, biomass) in decarbonisation. - Emerging energy technologies (e.g., hydrogen, carbon capture and storage, advanced nuclear). - The challenges and opportunities of integrating different energy sources into the grid and individual sites. - Role of decentralised generation (e.g., microgrids supporting resilience). - Storage technologies enabling renewables (e.g., battery storage systems). - Policy incentives and subsidies driving adoption (e.g., Contracts for Difference for renewables). - Transition risks and stranded assets (e.g., early retirement of gas boilers). - Global perspectives on net zero (e.g., EU vs UK policy pathways).		
K10	Energy systems and processes and the principles of reducing energy consumption.	TPQ
Detailed technical understanding of how energy is used and how to reduce it, for example: - Principles of thermodynamics, heat transfer, and energy conversion. - Common energy-consuming systems and equipment in buildings and industry (e.g., HVAC, lighting, motors, pumps, compressed air, refrigeration, industrial processes). - The principles of energy efficiency: insulation, waste heat recovery, variable speed drives, efficient lighting technologies, optimal control strategies. - Understanding load profiles, baseload, and peak demand. - Behavioural change strategies to reduce energy consumption. - Digitalisation in energy efficiency (e.g., smart controls, IoT sensors).		

Ref	KSB to be assessed	Assessment Method
	- Energy recovery techniques (e.g., heat recovery from exhaust air). - System optimisation (e.g., fine-tuning BMS schedules). - Maintenance as a factor in efficiency (e.g., cleaning heat exchangers). - Integration of energy efficiency into design stage (e.g., passive design in new builds).	
K11	Data collection, storage and reporting methods and techniques.	TPQ
	Proficiency in managing energy data is fundamental, for example: - Different methods for collecting energy data (manual meter readings, smart meters, sub-metering, building management systems - BMS). - Techniques for ensuring data accuracy, integrity, and completeness. - Methods for storing energy data (databases, spreadsheets, energy management software). - Principles of data visualisation to present energy information clearly (charts, dashboards). - Understanding of reporting requirements for internal and external stakeholders. - Automated data collection techniques (e.g., AMR systems with IoT sensors). - Version control and audit trails for reliability (e.g., keeping metadata for meter files). - Data security protocols (e.g., encrypted databases). - Comparing data sources for consistency (e.g., cross-checking BMS vs invoices). - Archiving data for long-term trend analysis (e.g., five-year consumption history).	
K12	Energy and water assessment and auditing principles and techniques.	IPE
	The ability to evaluate energy and water performance systematically, for example: - The purpose and scope of energy and water audits (e.g., walk-through, detailed, investment grade). - Methodologies for conducting energy and water audits (e.g., data analysis, site surveys, measurement campaigns). - Identifying energy and water waste, inefficiencies, and improvement opportunities. - Calculating potential energy and water savings and return on investment (ROI) for identified measures. - Developing comprehensive audit reports with actionable recommendations. - Engaging stakeholders during audits (e.g., interviewing site engineers). - Prioritising measures based on impact and cost (e.g., ranking actions by ROI). - Benchmarking consumption (e.g., CIBSE TM46 intensity benchmarks). - Post-audit follow-ups to confirm implementation (e.g., site revisit after retrofits). - Integration of water and energy audits (e.g., combined steam and condensate system analysis).	
K13	Meter reading techniques: reading, collecting and recording data.	IPE

Ref	KSB to be assessed	Assessment Method
	Practical skills in obtaining accurate utility data, for example: • How to read various types of energy meters (e.g., electricity, gas, water, heat meters – analogue and digital). • Understanding units of measurement for different utilities (kWh, m³, GJ). • Techniques for accurately collecting and recording meter data. • Identifying potential meter faults or anomalies. • Using automated meter reading (AMR) systems effectively. • Ensuring meters are calibrated and maintained (e.g., annual utility checks). • Training staff in accurate reading (e.g., toolbox talks). • Cross-checking readings against invoices (e.g., monthly validation). • Archiving meter data systematically (e.g., central data repositories). • Using meter data to identify efficiency opportunities (e.g., spotting high overnight loads).	
K14	Principles of utility procurement, billing, tariff, supplier query and negotiations.	IPE
	Knowledge of the commercial aspects of energy supply, for example: • Understanding different utility tariffs and pricing structures (e.g., fixed-rate, variable-rate, peak/off-peak, capacity charges). • Principles of utility bill validation and identifying billing errors. • The process of utility procurement, including tendering and contract negotiation. • Strategies for engaging with utility suppliers to resolve queries and improve service. • Awareness of energy market dynamics and their impact on pricing. • Framework agreements and group purchasing (e.g., collective procurement). • Risk management in contracts (e.g., hedging against price spikes). • Sustainability clauses in procurement (e.g., renewable supply guarantees). • Scenario modelling for procurement (e.g., multi-year contract vs spot prices). • Monitoring supplier performance KPIs (e.g., service level agreements).	
K15	Principles of energy baselines and the variables that affect energy consumption.	TPQ
	Establishing a reference point for performance measurement, for example: • The concept of an energy baseline and its importance for measuring energy performance improvements. • Methods for establishing robust baselines (e.g., regression analysis, CUSUM). • Key variables that influence energy consumption (e.g., weather/temperature, occupancy levels, production output, operating hours, equipment schedules). • How to normalise energy data to account for these variables. • The impact of changes in variables on reported energy savings. • Ongoing review of baselines to reflect changes (e.g., post-retrofit reset). • Statistical methods for analysis (e.g., R² in regression models). • Aligning baselines with ISO 50001 requirements (e.g., EnPIs).	

Ref	KSB to be assessed	Assessment Method
	- Communicating baselines clearly to stakeholders (e.g., reports showing normalised vs actual). - Using baselines for incentive schemes (e.g., performance contracts).	
K16	Energy performance monitoring and analysis: techniques, processes, systems and equipment. Factors affecting energy use, efficiency and inefficiency.	TPQ
Systematic tracking and evaluation of energy use, for example: - Techniques for continuous energy performance monitoring (e.g., energy targeting and reporting, variance analysis). - The use of energy management information systems (EMIS) and Building Management Systems (BMS) for data collection and analysis. - Principles of sub-metering and its role in identifying areas of high consumption. - Factors contributing to energy inefficiency (e.g., poorly maintained equipment, sub-optimal controls, behavioural waste, leaky systems). - Methods for identifying and quantifying energy savings opportunities. - Normalisation techniques for fair comparison (e.g., weather correction). - Predictive analytics for forecasting (e.g., AI-based demand models). - Periodic reporting cycles (e.g., monthly management reports). - Benchmarking against industry norms (e.g., CIBSE TM46). - Post-project monitoring to confirm savings (e.g., M&V using IPMVP).		
K17	Principles of developing and implementing strategies, policies and plans for energy management and decarbonisation.	TPQ
The ability to formulate a strategic approach to energy, for example: - The process of developing an energy management strategy aligned with organisational goals and net zero targets. Components of an effective energy policy (e.g., commitment, objectives, responsibilities). - Developing detailed action plans with specific initiatives, timelines, and responsible parties. - Components of an effective energy policy (e.g., commitment, objectives, responsibilities). - Methods for gaining stakeholder buy-in and securing resources for energy management initiatives. - Embedding accountability frameworks (e.g., departmental targets). - Tracking KPIs against strategy (e.g., CO₂ reduction per year) - Principles of continuous improvement in energy management (e.g., Plan-Do-Check-Act cycle). - Integration with ESG and sustainability reporting (e.g., aligning energy plans with corporate ESG metrics). - Engagement with supply chain for decarbonisation (e.g., green procurement). - Scenario planning for future challenges (e.g., carbon price increases).		
K18	Techniques to identify, monitor and analyse utilities usage and their	TPQ

Ref	KSB to be assessed	Assessment Method
	emissions.	
Practical methods for understanding and quantifying environmental impact, for example: • Techniques for identifying sources of utility consumption within a facility or process. • Methods for monitoring real-time and historical utility data (e.g., smart meter data, interval data). • Using energy performance indicators (EnPIs) to track efficiency. • Calculating direct (Scope 1) and indirect (Scope 2 & 3) greenhouse gas emissions from utility consumption. • Benchmarking carbon intensity (e.g., kgCO₂/m²). • Tools and software for carbon accounting and reporting. • Lifecycle emissions analysis (e.g., embodied carbon in equipment). • Use of digital twins to model utility use (e.g., HVAC simulations). • Auditing emissions data for assurance (e.g., third-party verification). • Reporting in line with frameworks (e.g., CDP, GRESB)		
K19	The principles and requirements of repairs, replacements and improvements related to energy system infrastructure and processes.	TPQ
Understanding the lifecycle management of energy assets, for example: • Principles of preventative, predictive, and reactive maintenance for energy systems. • Criteria for deciding between repairing, replacing, or upgrading energy infrastructure (e.g., cost-benefit analysis, payback period, technical obsolescence). • Understanding specifications and requirements for energy-efficient replacements (e.g., SEER ratings for HVAC, efficiency classes for motors). • Risk assessment in maintenance decisions (e.g., safety implications of boiler repair). • Awareness of legal and regulatory requirements for modifications to energy infrastructure. • Lifecycle costing for assets (e.g., total cost of ownership). • The importance of commissioning and recommissioning of energy systems to ensure optimal performance. • Impact on operations during downtime (e.g., production halts). • Sustainability considerations (e.g., refrigerants with low GWP). • Supplier and warranty factors (e.g., long-term guarantees).		
K20	Quality assurance procedures.	IPE
Knowledge of maintaining high standards in energy management activities, for example: • The purpose and benefits of quality assurance in energy data collection, analysis, and project implementation. • Methods for ensuring data accuracy and reliability.		

Ref	KSB to be assessed	Assessment Method
	• Procedures for reviewing and verifying the quality of energy audits and reports. • The role of internal and external audits in maintaining quality standards (e.g., for ISO 50001 certification). • Continuous improvement processes to enhance the quality of energy management outputs. • QA checklists for project stages (e.g., pre-installation checks). • Document control procedures (e.g., versioning in SharePoint). • Training for QA awareness (e.g., data entry standards). • Error tracking logs (e.g., billing error register). • Benchmarking QA processes (e.g., aligning with ISO 9001).	
K21	Methods of interpreting and extracting relevant information from sources such as manufacturer's instructions, drawings, plans, specifications, and previous reports.	TPQ
	The ability to synthesise information from diverse technical documents, for example: • How to read and interpret engineering drawings (e.g., P&IDs, electrical schematics, architectural plans). • Understanding technical specifications for energy equipment and systems. • Extracting critical data and operational parameters from manufacturer's instructions and manuals. • Analysing previous energy audit reports, feasibility studies, and maintenance logs to inform current decisions. • Identifying key performance indicators and relevant data points from various documents. • Cross-checking documents for consistency (e.g., drawings vs as-built conditions). • Translating technical details for non-technical audiences (e.g., simplifying specs). • Maintaining a technical library of key documents (e.g., digital manuals archive). • Engaging suppliers to clarify ambiguous information (e.g., interpreting O&M instructions). • Using extracted data to inform procurement and project planning (e.g., tender specs)	
K22	Principles and use for using information technology and digital systems to monitor energy use.	IPE
	Understanding the application of digital tools in energy management, for example: • The role of Building Management Systems (BMS), Energy Management Information Systems (EMIS), and SCADA systems in energy monitoring and control. • Principles of data acquisition, telemetry, and remote monitoring. • The use of energy analytics software for identifying consumption patterns and anomalies. • Awareness of IoT (Internet of Things) devices and sensors for granular energy	

Ref	KSB to be assessed	Assessment Method
	data collection. • Basic understanding of cloud-based energy management platforms. • Cybersecurity considerations in digital monitoring (e.g., secure logins). • Integration of different platforms (e.g., linking BMS and invoice systems). • Automated reporting capabilities (e.g., scheduled EMIS reports). • Mobile applications for monitoring (e.g., energy dashboards on tablets). • Evaluation of new digital tools for suitability (e.g., pilot projects).	
K23	General Data Protection Regulation (GDPR). Cyber security.	IPE
	Awareness of data privacy and security issues, for example: • The core principles of GDPR (lawfulness, fairness, transparency, purpose limitation, data minimisation, accuracy, storage limitation, integrity and confidentiality, accountability). • The implications of GDPR for collecting, storing, and processing energy consumption data that might be linked to individuals or specific activities. • Basic cybersecurity principles to protect energy data and control systems from unauthorised access or breaches. • Recognising common cyber threats (e.g., phishing, malware) and best practices for data protection. • The importance of secure data storage and transmission protocols. • Training requirements for GDPR compliance (e.g., annual refresher). • Access controls to sensitive data (e.g., role-based permissions). • Auditing systems for vulnerabilities (e.g., penetration testing). • Ensuring third-party compliance (e.g., supplier contracts). • Incident response procedures (e.g., breach reporting timelines)	
K24	Principles of providing feedback to improve the quality of energy management.	TPQ
	The ability to communicate constructively for improvement, for example: • The importance of timely, specific, and actionable feedback. • Techniques for delivering constructive feedback effectively, focusing on observations and impact. • The role of feedback in continuous improvement cycles (e.g., performance reviews, project debriefs). • Creating a culture where feedback is welcomed and acted upon. • Providing positive reinforcement for good energy management practices. • Balancing positive and corrective feedback (e.g., feedback sandwich). • Documenting feedback for accountability (e.g., meeting minutes). • Using feedback surveys to gather insights (e.g., post-training surveys). • Two-way feedback between managers and staff (e.g., 360° reviews). • Applying feedback to future strategy (e.g., revising policies).	
K25	Principles of equity, diversity, and inclusion in the workplace. Unconscious bias.	IPE

Ref	KSB to be assessed	Assessment Method
	Understanding the importance of a fair and inclusive work environment, for example: • The definitions of equity, diversity, and inclusion and their benefits for individuals and organisations. • Awareness of different forms of discrimination and bias (e.g., gender, race, age, disability). • Understanding unconscious bias and its potential impact on decision-making, recruitment, and team dynamics. • The role of an Energy Manager in fostering a respectful and welcoming workplace culture. • Promoting equal opportunities for all employees. • Challenging discriminatory behaviour constructively (e.g., addressing inappropriate comments). • Encouraging participation from underrepresented groups (e.g., inclusive workshops). • Embedding EDI into sustainability initiatives (e.g., community energy projects). • Raising awareness through training (e.g., unconscious bias training). • Supporting organisational EDI strategies (e.g., diversity action plans).	
K26	Team working and collaboration principles.	IPE
	Knowledge of effective group dynamics, for example: • The benefits of teamwork and collaboration in achieving shared goals. • Principles of effective communication within a team (e.g., active listening, clear articulation). • Strategies for conflict resolution and building consensus. • The importance of clearly defined roles and responsibilities within a team. • Techniques for motivating and supporting team members to achieve collective success. • Adapting to different team roles as needed (e.g., leading or supporting). • Encouraging collaboration with external partners (e.g., contractors, suppliers). • Promoting accountability within the team (e.g., agreed deliverables). • Celebrating team achievements (e.g., marking energy reduction milestones). • Encouraging knowledge sharing (e.g., cross-departmental workshops).	
K27	Personal wellbeing and mental health awareness.	IPE
	Understanding the importance of individual and team wellbeing, for example: • Recognising signs of mental health issues in oneself and others. • Strategies for managing personal stress and promoting resilience. • Awareness of common stressors in the workplace and their impact on mental health. • Knowledge of available support resources (e.g., EAP, mental health first aiders). • The importance of work-life balance and self-care. • Promoting open conversations about wellbeing (e.g., wellbeing check-ins).	

Ref	KSB to be assessed	Assessment Method
	- Encouraging healthy workplace practices (e.g., regular breaks). - Reducing stigma around mental health (e.g., awareness campaigns). - Supporting colleagues experiencing difficulties (e.g., offering adjustments). - Integrating wellbeing into organisational culture (e.g., wellbeing champions).	
K28	Problem solving techniques.	TPQ
The ability to systematically address challenges, for example: - Techniques for defining a problem clearly and comprehensively. - Common problem-solving methodologies (e.g., root cause analysis, 5 Whys, fishbone diagrams, PDCA cycle). - Methods for generating and evaluating potential solutions. - Decision-making frameworks (e.g., cost-benefit analysis). - Testing solutions through pilots (e.g., trialling new controls). - The importance of monitoring the effectiveness of implemented solutions. - Collaborative problem-solving with teams (e.g., brainstorming workshops). - Documenting problems and lessons learned (e.g., case studies). - Using data to support problem solving (e.g., regression analysis). - Encouraging innovative thinking (e.g., digital twin modelling).		
K29	Verbal communication techniques. Giving and receiving information. Adapting style to audience. Barriers in communication and how to overcome them. Specific terminology.	TPQ
Proficiency in spoken interaction, for example: - Principles of clear, concise, and articulate verbal communication. - Techniques for active listening and asking effective questions. - Adapting communication style and content to suit different audiences (e.g., technical experts, senior management, general staff, external contractors). - Identifying common barriers to communication (e.g., jargon, assumptions, emotional responses, noise) and strategies to overcome them. - Using appropriate energy management and technical terminology correctly and explaining it when necessary. - Clarifying misunderstandings quickly (e.g., during meetings). - Encouraging two-way dialogue (e.g., open Q&A). - Delivering engaging presentations (e.g., workshops). - Providing feedback verbally in constructive ways (e.g., coaching sessions). - Representing the organisation professionally externally (e.g., conferences).		
K30	Written communication techniques. Plain English principles, specific terminology and technical report writing.	TPQ
Mastery of written correspondence and documentation, for example: - Principles of plain English to ensure clarity, conciseness, and readability in all written communications. - Structure and components of effective technical reports (e.g., executive		

Ref	KSB to be assessed	Assessment Method
	summary, introduction, methodology, findings, recommendations, conclusion). • Using specific energy management terminology accurately and consistently. • Tailoring writing style for different audiences (e.g., directors vs engineers). • Techniques for formatting reports, emails, and other documents for maximum impact and readability. • The importance of proofreading and editing for grammar, spelling, and punctuation. • Incorporating visuals (charts, graphs) (e.g., dashboards). • Peer review before publication (e.g., report sign-off). • Maintaining records for compliance (e.g., SECR submissions). Peer review before publication (e.g., report sign-off).	
K31	When to escalate tasks and issues, and to whom.	IPE
Understanding reporting lines and accountability, for example: • Recognising when a task or issue is beyond one's scope of authority, expertise, or resources. • The importance of timely escalation to prevent minor issues from becoming major problems. • Knowledge of the organisational hierarchy and reporting structures. • Understanding the specific responsibilities of different roles within the organisation in relation to energy management problems. • Procedures for escalating issues effectively, providing all necessary information. • Communicating facts, not assumptions (e.g., evidence-based reports). • Documenting escalation clearly (e.g., written records). • Following formal escalation protocols (e.g., RIDDOR reporting). • Ensuring escalation does not bypass accountability (e.g., going through line manager). • Reviewing outcomes of escalations to improve processes (e.g., lessons learned).		

Ref	KSB to be assessed	Assessment Method
Skills		
S1	Comply with energy regulations and legislation.	IPE
An Energy Manager can actively ensure adherence to relevant energy laws. This means being able to, for example: • Identify and apply relevant UK and international energy legislation (e.g., Energy Efficiency Regulations, Carbon Reduction Commitment). • Interpret and ensure compliance with reporting schemes (e.g., Streamlined Energy and Carbon Reporting - SECR, ESOS). • Monitor legislative updates and assess their impact on organisational energy		

Ref	KSB to be assessed	Assessment Method
	practices. • Implement necessary changes to processes and systems to maintain legal compliance. • Maintain robust documentation and evidence for external audits and inspections (e.g., keeping an audit trail of invoices, meter data, and compliance certificates). • Carry out internal compliance reviews to identify gaps or risks (e.g., reviewing departmental energy records before an ESOS audit). • Provide internal guidance and training sessions to ensure staff awareness of compliance obligations (e.g., delivering a briefing to operations teams on minimum efficiency standards). • Engage with regulatory bodies and professional associations to stay informed of upcoming changes (e.g., attending Energy Institute webinars on new carbon reduction targets). • Integrate compliance considerations into project planning and investment decisions (e.g., selecting only technologies that meet current building energy codes). • Promote a compliance-first culture, reducing the risk of penalties or reputational harm (e.g., embedding compliance checks in project initiation documents).	
S2	Comply with energy management related policies, procedures, processes, standards, specifications and codes of practice.	TPQ
	An Energy Manager can effectively implement and follow established energy guidelines. This includes the ability to, for example: • Apply organisational energy policies and established procedures for data collection, analysis, and reporting. • Adhere to recognised energy management standards like ISO 50001 in practice. • Follow industry codes of practice for energy efficient operations and maintenance. • Ensure compliance with specific energy performance specifications for equipment and systems. • Embed compliance checks into project lifecycles (e.g., including energy policy checks in project stage-gate reviews). • Communicate policy requirements clearly to teams and contractors (e.g., briefing contractors on site energy-saving procedures). • Contribute to policy development and periodic reviews to reflect evolving best practice (e.g., suggesting amendments to the company's sustainability policy after COP28 outcomes). • Benchmark against sector standards to highlight strengths and areas for improvement (e.g., comparing building energy intensity with CIBSE TM46 benchmarks). • Promote continuous improvement by integrating lessons learned into procedures (e.g., updating operational guidance after post-project reviews). • Support accreditation and certification processes to validate compliance (e.g., assisting with ISO 14001 recertification audits).	

Ref	KSB to be assessed	Assessment Method
S3	Follow health and safety regulations and procedures.	TPQ
An Energy Manager can demonstrate practical application of health and safety in their daily work. This involves the ability to, for example: • Work safely around energy infrastructure (e.g., electrical systems, high-temperature equipment). • Adhere to all site-specific safety protocols and emergency procedures. • Use appropriate Personal Protective Equipment (PPE) as required for energy-related tasks. • Report hazards or incidents promptly and follow established reporting lines. • Communicate policy requirements clearly to teams and contractors (e.g., briefing contractors on site energy-saving procedures). • Embed compliance checks into project lifecycles (e.g., including energy policy checks in project stage-gate reviews). • Benchmark against sector standards to highlight strengths and areas for improvement (e.g., comparing building energy intensity with CIBSE TM46 benchmarks). • Promote continuous improvement by integrating lessons learned into procedures (e.g., updating operational guidance after post-project reviews). • Contribute to policy development and periodic reviews to reflect evolving best practice (e.g., suggesting amendments to the company's sustainability policy after COP28 outcomes). • Support accreditation and certification processes to validate compliance (e.g., assisting with ISO 14001 recertification audits).		
S4	Apply safe-working practices: risk assessments, method statements control measures and safe systems of work.	TPQ
An Energy Manager can proactively ensure safety in energy-related projects and operations. This means being able to, for example: • Conduct basic risk assessments for energy-related activities, identifying potential hazards. • Implement and verify control measures to mitigate risks (e.g., isolating power, ensuring proper ventilation). • Work within established safe systems of work (e.g., permit-to-work systems for high-risk tasks). • Contribute to or review method statements for complex energy improvement projects. • Ensure compliance with legal and organisational requirements for risk management (e.g., aligning RA/MS with HSE regulations). • Engage workers in hazard identification (e.g., consulting technicians when preparing method statements). • Keep clear records of risk assessments and controls (e.g., storing risk assessments centrally for audit purposes). • Ensure control measures are practical and regularly updated (e.g., refreshing control measures following new HSE guidance).		

Ref	KSB to be assessed	Assessment Method
	- Review method statements after project completion (e.g., updating RAMS based on lessons learned during a retrofit). - Promote continual improvement in safety practices (e.g., suggesting improvements to PTW procedures after audits).	
S5	Apply sustainability principles and techniques.	TPQ
An Energy Manager can integrate environmental considerations into energy decisions. This includes the ability to, for example: - Identify opportunities to reduce the environmental impact of energy consumption beyond just carbon emissions. - Propose and evaluate energy solutions that support broader sustainability goals (e.g., resource efficiency, waste reduction). - Advocate for and support the adoption of renewable energy technologies. - Integrate lifecycle analysis into projects (e.g., considering embodied carbon in equipment upgrades). - Embed circular economy approaches into energy initiatives (e.g., reusing components in lighting retrofits instead of full replacement). - Encourage suppliers to meet sustainability criteria (e.g., specifying recycled materials in procurement contracts). - Set and monitor sustainability KPIs (e.g., tracking reductions in kWh per FTE across offices). - Support social as well as environmental sustainability goals (e.g., prioritising local contractors for community benefit). - Report sustainability outcomes transparently to stakeholders (e.g., publishing annual sustainability reports with energy and emissions data). - Educate others on sustainable energy practices and their benefits.		
S6	Plan and prioritise own work.	TPQ
An Energy Manager can effectively manage their workload and meet deadlines. This involves the ability to, for example: - Set clear, achievable goals for energy management tasks and projects. - Prioritise tasks based on urgency, impact, and strategic importance. - Develop realistic work schedules and allocate time effectively. - Balance short-term needs with long-term strategic objectives (e.g., completing a quick win retrofit while planning a decarbonisation roadmap). - Use project management tools for tracking and progress monitoring (e.g., using MS Project or Trello boards). - Regularly reassess priorities to ensure alignment with business needs (e.g., reviewing workload in weekly planning sessions). - Adapt plans in response to changing priorities or unforeseen challenges. - Communicate workload status with stakeholders to manage expectations (e.g., updating managers on project timelines). - Document progress to support accountability and review (e.g., recording completed actions in a project log).		

Ref	KSB to be assessed	Assessment Method
	Reflect on time management to improve efficiency (e.g., adjusting scheduling after analysing delays).	
S7	Identify improvements to systems and process that reduce energy consumption.	TPQ
An Energy Manager can diagnose inefficiencies and propose solutions. This means being able to for example: - Observe and analyse existing energy systems and operational processes for inefficiencies. - Pinpoint specific areas where energy is being wasted or used inefficiently. - Use benchmarking to identify underperforming systems (e.g., comparing building energy intensity with industry standards). - Collaborate with operations staff for insights (e.g., discussing production schedules with line managers). - Propose practical and viable improvement measures (e.g., equipment upgrades, control optimisations, behavioural changes). - Articulate the potential energy savings and benefits of proposed improvements. - Pilot solutions on a small scale before wider rollout (e.g., trialling occupancy sensors in one office area). - Quantify cost-benefit alongside energy savings (e.g., calculating ROI of insulation improvements). - Align improvement proposals with organisational strategy and goals (e.g., ensuring measures support net-zero commitments) - Incorporate continuous improvement loops (e.g., reviewing savings six months post-installation).		
S8	Collect, store and report data.	TPQ
An Energy Manager can manage energy information effectively. This includes the ability to, for example: - Accurately collect energy data from various sources (e.g., meters, invoices, BMS). - Organise and store data securely and accessibly (e.g., in spreadsheets, databases, energy management software). - Ensure data integrity and accuracy throughout the collection and reporting process. - Validate data to eliminate errors and anomalies (e.g., flagging sudden spikes in BMS reports). - Introduce automated data collection where possible (e.g., using AMR for gas and water meters). - Ensure compliance with data governance policies (e.g., applying GDPR principles for personal data in sub-metering). - Generate clear and concise reports on energy consumption, costs, and performance. - Present findings in user-friendly formats (e.g., using visual charts for senior		

Ref	KSB to be assessed	Assessment Method
	managers). • Support decision-making by providing reliable insights (e.g., supplying baseline data for investment cases). • Maintain long-term data archives for trend analysis (e.g., storing five years of historical data)	
S9	Apply energy and water assessments and audit techniques.	IPE
An Energy Manager can systematically evaluate energy and water use. This means being able to, for example: • Conduct basic walk-through energy audits to identify quick wins and significant consumption areas. • Perform initial assessments to identify potential water waste and efficiency opportunities. • Apply structured audit frameworks for consistency (e.g., using CIBSE TM22 for energy assessments). • Use specialist tools for detailed measurement (e.g., deploying data loggers on HVAC systems). • Engage staff during audits for operational insights (e.g., interviewing site engineers). • Document findings and propose actionable recommendations based on audit results. • Prioritise actions by payback period and impact (e.g., ranking projects based on ROI). • Utilise measurement and verification (M&V) principles to quantify savings from implemented measures. • Follow up to verify implemented measures (e.g., post-installation measurement of lighting upgrades). • Share audit findings with stakeholders to encourage participation (e.g., presenting results in departmental meetings)		
S10	Read, collect and record metered data.	IPE
An Energy Manager can accurately obtain fundamental energy data. This includes the ability to, for example: • Read various types of utility meters (e.g., electricity, gas, water, heat) correctly. • Manually record meter readings with precision and attention to detail. • Input meter data into relevant systems or spreadsheets accurately. • Identify and report any anomalies or potential issues with meter readings or equipment. • Validate readings against invoices (e.g., checking supplier bills against recorded data). • Ensure calibration and maintenance of meters (e.g., scheduling annual gas meter accuracy checks). • Introduce AMR (automatic meter reading) where feasible (e.g., installing smart meters for water supplies).		

Ref	KSB to be assessed	Assessment Method
	• Train colleagues in accurate meter reading (e.g., showing site teams how to read multi-register meters). • Maintain logs for audit purposes (e.g., filing monthly meter reports in compliance folders). • Use meter data to track performance trends (e.g., monitoring seasonal variations in heating demand).	
S11	Analyse utility bills.	IPE
An Energy Manager can scrutinise utility expenditure. This means being able to, for example: • Review utility invoices for accuracy, identifying discrepancies or errors. • Compare bills against actual meter data (e.g., cross-checking invoices with half-hourly meter readings). • Raise queries with utility suppliers regarding incorrect or unclear billing. • Understand different tariff components and their impact on costs. • Highlight unusual spikes for investigation (e.g., identifying unexplained cost increases in a particular site). • Identify trends in utility costs and consumption from billing data. Raise queries with utility suppliers regarding incorrect or unclear billing. • Model alternative tariffs for savings (e.g., assessing time-of-use tariff options). • Support procurement with cost analysis (e.g., preparing consumption profiles for tendering energy contracts). • Use billing data to inform forecasting (e.g., predicting next year's energy spend). • Present cost breakdowns to stakeholders for budgeting (e.g., summarising energy spend by department).		
S12	Analyse and monitor energy performance data.	TPQ
An Energy Manager can interpret energy usage trends and identify issues. This includes the ability to, for example: • Process and interpret energy consumption data (e.g., graphs, tables, dashboards). • Identify patterns, anomalies, and areas of high energy use. • Calculate key energy performance indicators (EnPIs) (e.g., kWh/m², kWh/unit of production). • Utilise monitoring software or tools to track energy performance over time. • Compare performance against targets (e.g., reviewing progress toward a 10% energy reduction goal). • Highlight underperforming areas for action (e.g., poor-performing HVAC units). • Integrate weather or production variables into analysis (e.g., correlating consumption with degree days). • Develop dashboards for stakeholder visibility (e.g., monthly reports for directors). • Report findings with clear visuals (e.g., energy heatmaps). • Use insights to support investment decisions (e.g., justifying chiller		

Ref	KSB to be assessed	Assessment Method
	replacement).	
S13	Implement energy management and decarbonisation strategies, policy or plans.	TPQ
An Energy Manager can put strategic energy initiatives into action. This means being able to, for example: • Translate strategic goals into practical, actionable steps for energy reduction and decarbonisation. • Secure funding or resources for initiatives (e.g., writing business cases for renewable installations). • Coordinate and manage activities required to implement energy projects (e.g., equipment installation, system optimisation). • Communicate implementation plans to relevant stakeholders and teams. • Engage staff to gain buy-in (e.g., staff workshops on energy strategy). • Align implementation with wider business objectives (e.g., embedding decarbonisation within corporate ESG strategy). • Monitor progress against established plans and make necessary adjustments • Track benefits delivered by strategies (e.g., annual reports showing CO₂ reduction). • Incorporate lessons into future planning (e.g., improving processes after pilot projects). • Engage external partners to strengthen outcomes (e.g., collaborating with ESCOs or consultants).		
S14	Identify, monitor and analyse usage of utilities and their emissions.	TPQ
An Energy Manager can track and understand environmental impact. This includes the ability to, for example: • Identify major utility consuming points within a facility or process. • Set up monitoring points to track utility consumption data effectively. • Calculate associated greenhouse gas emissions (Scope 1, 2, and relevant Scope 3) from utility use. • Develop emissions baselines (e.g., establishing 2019 as a reporting year). • Use data to highlight areas for emissions reduction and improved efficiency. • Track Scope 3 emissions where relevant (e.g., outsourced transport). • Compare against external benchmarks (e.g., sector averages for carbon intensity). • Support net zero reporting requirements (e.g., CDP or SECR submissions) • Visualise data to engage stakeholders (e.g., carbon footprint infographics). • Link utility data to sustainability KPIs (e.g., tonnes CO₂e per FTE).		
S15	Identify options for repairs or replacements related to energy system infrastructure.	TPQ
An Energy Manager can assess the viability of energy asset interventions. This means		

Ref	KSB to be assessed	Assessment Method
	being able to, for example: • Evaluate the condition and performance of existing energy equipment (e.g., boilers, chillers, lighting). • Research and propose suitable repair options to restore functionality and efficiency. • Identify appropriate replacement technologies or systems that offer improved energy performance. • Conduct initial cost-benefit analysis for repair vs. replacement scenarios. • Engage suppliers for technical advice (e.g., discussing efficiency ratings with vendors). • Consider lifecycle costs, not just capital (e.g., total cost of ownership models). • Assess operational impacts of downtime (e.g., production interruptions from boiler replacement) • Prioritise safety and compliance (e.g., replacing non-compliant electrical systems) • Factor in sustainability benefits of upgrades (e.g., low-GWP refrigerants). • Document options clearly for management decisions (e.g., presenting a repairs vs replacement report	
S16	Apply quality assurance procedures.	IPE
	An Energy Manager can ensure the accuracy and reliability of their work. This includes the ability to, for example: • Follow established quality checks for data collection and entry. • Review energy reports and analyses for accuracy and consistency. • Embed QA at every stage of reporting (e.g., applying checks before submitting board reports). • Undertake peer reviews to validate findings (e.g., colleague cross-checking consumption analysis). • Standardise templates for consistency (e.g., using a uniform reporting format across sites). • Maintain organised documentation and records for auditability. • Track errors to prevent recurrence (e.g., maintaining an error log for billing data). • Implement feedback loops to continuously improve the quality of energy management processes. • Train colleagues in QA practices (e.g., running workshops on accurate data handling). • Benchmark quality processes against industry best practice (e.g., aligning with ISO 9001 principles).	
S17	Interpret and extract information from sources such as manufacturer's instructions, drawings, plans, specifications, or previous reports.	TPQ
	An Energy Manager can make sense of technical documentation. This means being able	

Ref	KSB to be assessed	Assessment Method
	to, for example: • Read and understand technical drawings (e.g., P&IDs, electrical diagrams) relevant to energy systems. • Extract critical operational parameters and maintenance requirements from manufacturer's manuals. • Locate relevant data and recommendations from previous energy audits or engineering reports. • Validate data across sources (e.g., confirming manufacturer data with site readings). • Cross-reference information for accuracy (e.g., checking as-built drawings against site surveys). • Synthesise information from multiple sources to inform decisions. • Translate technical information into plain language (e.g., explaining drawings to non-technical staff). • Use extracted data to inform investment cases (e.g., technical specs in replacement proposals). • Keep updated document libraries (e.g., maintaining digital copies of O&M manuals). • Engage external experts where deeper interpretation is needed (e.g., consulting engineers on structural implications).	
S18	Use information technology and digital systems to monitor energy use.	IPE
	An Energy Manager can leverage technology for energy insights. This includes the ability to, for example: • Operate Energy Management Information Systems (EMIS) or Building Management Systems (BMS) for data retrieval and basic analysis. • Work with smart metering platforms to access granular consumption data. • Utilise spreadsheet software effectively for energy data manipulation and charting. • Integrate multiple data sources (e.g., combining BMS and invoice data). • Develop automated reporting solutions (e.g., scripting auto-reports in EMIS). • Maintain cybersecurity awareness (e.g., applying secure logins for BMS access). • Train others in system use (e.g., showing facilities teams how to pull data). • Evaluate digital tools for suitability (e.g., comparing EMIS vendors). • Leverage cloud systems for scalability (e.g., centralising data across global sites). • Familiarise themselves with new digital tools and software relevant to energy monitoring.	
S19	Comply with GDPR and cyber security regulations and policies.	IPE
	An Energy Manager can handle data responsibly and securely. This means being able to,	

Ref	KSB to be assessed	Assessment Method
	for example: • Process personal or sensitive data (if relevant to energy use) in accordance with GDPR principles. • Adhere to organisational cybersecurity policies when accessing or storing energy data. • Understand the importance of data protection in preventing misuse of energy information. • Identify and report potential data breaches or security vulnerabilities. • Restrict access to sensitive data (e.g., role-based permissions in EMIS). • Encrypt data where required (e.g., password-protected spreadsheets). • Conduct regular data audits (e.g., reviewing access logs). • Undertake GDPR training regularly (e.g., annual compliance refresher). Ensure third-party providers comply with standards (e.g., GDPR clauses in contracts) • Promote awareness of cyber risks across teams (e.g., phishing awareness sessions). • Ensure third-party providers comply with standards (e.g., GDPR clauses in contracts)	
S20	Apply policies and practices to support equality, diversity and inclusion.	IPE
	An Energy Manager can contribute to a fair and respectful workplace. This includes the ability to, for example: • Interact respectfully with all colleagues, regardless of background. • Promote inclusive practices in team discussions and project activities. • Challenge discriminatory behaviour or language in a constructive manner. • Support initiatives that foster a diverse and equitable working environment. • Adapt communication styles for inclusivity (e.g., using plain English for non-native speakers). • Encourage diverse perspectives in projects (e.g., inviting input from varied roles). • Mentor or support underrepresented groups (e.g., buddying schemes for new hires). • Integrate EDI principles into sustainability initiatives (e.g., inclusive engagement workshops). • Ensure accessibility in energy reporting (e.g., colour-blind friendly charts). • Celebrate cultural events and awareness days (e.g., workplace activities for International Women's Day).	
S21	Apply team working principles.	IPE
	An Energy Manager can collaborate effectively with others. This means being able to, for example: • Work constructively with cross-functional teams to achieve energy goals. • Listen actively to others' perspectives and contributions.	

Ref	KSB to be assessed	Assessment Method
	• Share knowledge and resources openly with colleagues. • Contribute positively to team discussions and problem-solving sessions. • Support colleagues in achieving shared targets (e.g., assisting operations with efficiency measures). • Adapt to different roles in teams as needed (e.g., leading or supporting depending on project). • Resolve conflicts constructively (e.g., mediating between departments over priorities). • Promote trust and accountability in teams (e.g., setting clear responsibilities in RACI models) • Encourage collaboration with external partners (e.g., working with contractors on audits). • Recognise and celebrate team achievements (e.g., acknowledging success in energy reduction projects).	
S22	Apply problem solving techniques.	TPQ
	An Energy Manager can methodically address challenges. This includes the ability to, for example: • Define problems clearly related to energy consumption or system performance. • Gather relevant information and data to understand the root cause of an issue. • Apply structured methods (e.g., root cause analysis, 5 Whys) (e.g., investigating boiler inefficiency). • Brainstorm and evaluate potential solutions to energy-related problems. • Use cost-benefit analysis to support decisions (e.g., comparing retrofit payback). • Engage stakeholders in problem-solving (e.g., involving operators in identifying solutions). • Test solutions through pilots (e.g., trialling control strategies before full rollout). • Implement and monitor solutions, adjusting as necessary to achieve desired outcomes. • Document problems and solutions for future learning (e.g., case studies). • Encourage innovative thinking (e.g., suggesting digital twins for energy modelling)	
S23	Communicate verbally using industry specific terminology.	TPQ
	An Energy Manager can convey information clearly through spoken word. This means being able to, for example: • Articulate energy concepts and technical information clearly to various audiences. • Use appropriate energy management terminology (e.g., kWh, kW, MWh, carbon footprint, baseload) accurately. • Adapt communication style and complexity to suit the listener (e.g., technical vs. non-technical). • Clarify misunderstandings promptly (e.g., explaining technical jargon).	

Ref	KSB to be assessed	Assessment Method
	- Engage in effective discussions and present findings verbally. - Encourage feedback during discussions (e.g., Q&A after presentations). - Use storytelling techniques to engage audiences (e.g., illustrating benefits through real case studies). - Deliver training sessions on energy awareness (e.g., toolbox talks). - Participate confidently in industry events (e.g., conferences or seminars). - Represent the organisation professionally in external meetings (e.g., stakeholder briefings).	
S24	Communicate in writing using industry specific terminology.	TPQ
An Energy Manager can produce clear and accurate written communications. This includes the ability to, for example: - Write concise and effective emails, memos, and reports on energy-related topics. - Use correct energy management terminology and units in written documents. - Structure written information logically for clarity and impact. - Produce grammatically correct and well-punctuated written materials - Tailor writing style to audience (e.g., simplifying for non-technical readers). - Prepare board-level reports with KPIs (e.g., monthly energy dashboards). - Draft clear technical specifications (e.g., tender documents). - Incorporate visuals to support written text (e.g., charts, graphs) - Review and proof documents before issue (e.g., peer checks) - Maintain accurate records for compliance (e.g., SECR submissions).		
S25	Recognise limitations of their role, seek input from others and escalate issues when required.	IPE
An Energy Manager can understand boundaries and leverage support. This means being able to, for example: - Identify when a task or problem exceeds their own technical expertise or authority. - Acknowledge personal limits openly (e.g., clarifying responsibilities with line manager). - Proactively seek advice or support from specialists, senior colleagues, or external experts. - Recognise when an issue requires escalation to higher management or relevant departments. - Communicate escalated issues clearly and provide all necessary background information. - Use escalation protocols consistently (e.g., incident reporting channels). - Maintain a network of experts for support (e.g., external consultants). - Balance independence with collaboration (e.g., attempting solutions but escalating promptly when needed). - Learn from experts to grow skills (e.g., shadowing specialists). - Document escalations for transparency (e.g., maintaining logs of raised issues)		

Ref	KSB to be assessed	Assessment Method
S26	Apply technical reporting writing techniques.	TPQ
An Energy Manager can produce professional and informative reports. This includes the ability to, for example: • Structure technical reports logically with clear headings, introductions, and conclusions. • Write objectively and precisely, avoiding ambiguity. • Adhere to established reporting templates or guidelines for energy audits, project updates, or performance reviews. • Present data and findings effectively using tables, charts, and graphs. • Tailor reports to different audiences (e.g., technical appendices vs summary for directors). • Include executive summaries for senior readers (e.g., board briefings). • Reference data sources transparently (e.g., citing conversion factors). • Apply QA checks before submission (e.g., peer review of drafts). • Incorporate visual design principles for readability (e.g., consistent use of colour coding). • Archive reports for future reference (e.g., central document repository)		

Ref	KSB to be assessed	Assessment Method
Behaviours		
B1	Prioritise health and safety for themselves and others.	TPQ
An Energy Manager always puts health and safety first, ensuring a secure working environment for everyone. This means for example: • Wearing and enforcing the correct use of personal protective equipment (PPE) appropriate to each task. • Conducting thorough risk assessments before undertaking any energy-related project or work and implementing appropriate control measures. • Adhering strictly to all health and safety regulations and company policies, including those related to working with energy systems. • Reporting any hazards or near misses promptly and taking immediate action to mitigate risks. • Ensuring all equipment and systems are maintained to prevent accidents and ensure safe operation. • Clearly communicating safety procedures and emergency protocols to colleagues and contractors to ensure shared understanding. • Planning energy management activities to minimise exposure to hazardous conditions and ensure safe working environments. • Promoting a proactive safety culture by encouraging colleagues to identify and report potential dangers.		

Ref	KSB to be assessed	Assessment Method
	- Demonstrating leadership by modelling safe behaviours and holding themselves accountable to the highest safety standards. - Keeping up to date with the latest health, safety, and environmental standards through continuous training and professional development.	
B2	Contribute towards a sustainable workplace.	TPQ
An Energy Manager plays a key role in building a sustainable future within the workplace. This involves for example: - Actively promoting and implementing energy efficiency initiatives that reduce the organisation's carbon footprint. - Identifying opportunities for renewable energy integration and advocating for their adoption. - Monitoring and analysing workplace energy data to track progress and identify further areas for sustainable improvement. - Encouraging responsible resource consumption beyond just energy, such as water and waste reduction. - Championing long-term environmental goals and integrating them into energy management strategies. - Educating colleagues on sustainable practices and their positive impact on the environment and the business. - Collaborating with suppliers and stakeholders to ensure sustainable procurement and reduce lifecycle environmental impacts. - Supporting certification schemes (e.g., ISO 14001 or ISO 50001) to demonstrate commitment to sustainability. - Promoting behavioural change campaigns that encourage staff to adopt greener habits in day-to-day operations. - Balancing cost-efficiency with environmental responsibility to deliver sustainable solutions that also make business sense. - Fostering people sustainability by supporting staff wellbeing, inclusion, and skills development, ensuring that workplace practices are socially as well as environmentally sustainable.		
B3	Contributes to equity, diversity, and inclusivity workplace culture.	IPE
An Energy Manager fosters an inclusive and respectful environment where everyone feels valued. This means for example: - Treating all colleagues fairly and equitably, regardless of their background, gender, ethnicity, or any other characteristic. - Challenging any discriminatory behaviour or language and speaking up for an inclusive culture. - Ensuring communication and information are accessible to all team members. - Actively promoting diverse perspectives and ideas in discussions and decision-making processes related to energy management. - Supporting initiatives that promote a diverse workforce and provide equal opportunities for growth.		

Ref	KSB to be assessed	Assessment Method
	• Adapting leadership and communication styles to accommodate different cultural, social, and personal needs within the team. • Providing training or awareness sessions that help colleagues recognise unconscious bias and encourage inclusive behaviours. • Participating in or supporting employee resource groups, mentoring programmes, or networks that strengthen diversity and inclusion. • Embedding inclusivity considerations into energy projects, ensuring sustainability initiatives benefit all stakeholders fairly. • Celebrating cultural events, achievements, and contributions of diverse colleagues to foster a sense of belonging.	
B4	Collaborate with others.	IPE
	An Energy Manager works seamlessly with colleagues and external partners, leveraging collective expertise to achieve energy goals. This includes for example: • Building strong, collaborative relationships with teams across different departments (e.g., finance, operations, facilities, IT) to embed energy efficiency. • Sharing information and insights openly, fostering a transparent and supportive working environment. • Actively listening to and respecting diverse opinions, finding common ground to achieve shared objectives. • Seeking input and feedback from others to improve energy management strategies and solutions. • Participating constructively in team meetings and projects, contributing to positive outcomes. • Working in partnership with external stakeholders, such as suppliers, contractors, and regulatory bodies, to align energy goals with broader sustainability objectives. • Offering support and knowledge-sharing to colleagues, helping build confidence and competence across the organisation. • Facilitating cross-functional workshops or training sessions to build shared understanding and drive collective action on energy initiatives. • Resolving conflicts constructively, ensuring collaboration remains focused on solutions and shared benefits. • Recognising and celebrating team achievements, reinforcing the value of collaboration in delivering successful outcomes.	
B5	Act ethically.	IPE
	An Energy Manager demonstrates unwavering integrity and honesty in all professional dealings. This involves for example: • Adhering to all relevant laws, regulations, and company policies, particularly concerning procurement, data handling, and financial management. • Rejecting any form of bribery, corruption, or unethical shortcuts, even under pressure to deliver results quickly. • Avoiding conflicts of interest and declaring any potential conflicts transparently.	

Ref	KSB to be assessed	Assessment Method
	• Maintaining confidentiality when handling sensitive or proprietary information. • Being truthful and transparent in all communications, reports, and data analysis. • Taking responsibility for their actions and rectifying mistakes promptly and honestly. • Ensuring fairness and impartiality when evaluating energy solutions, suppliers, or contractors, basing decisions on merit and evidence. • Promoting accountability by modelling ethical behaviour and encouraging colleagues to uphold the same standards. • Considering the wider social and environmental implications of decisions, ensuring they align with responsible business practises. • Seeking guidance when faced with ethical dilemmas, rather than making decisions that could compromise integrity.	
B6	Act professionally.	IPE
An Energy Manager upholds a high standard of conduct and competence in their role. This means for example: • Being punctual and reliable, meeting commitments and deadlines consistently. • Maintaining a positive and respectful demeanour in all interactions, even under pressure. • Demonstrating accountability by taking ownership of tasks, decisions, and outcomes. • Communicating clearly and appropriately across all levels of the organisation and with external partners. • Presenting themselves and their work in a polished and credible manner. • Representing the organisation positively in both internal and external engagements. • Upholding confidentiality and discretion in sensitive matters, reinforcing trust and credibility. • Accepting constructive feedback and using it for continuous improvement. • Staying up to date with industry developments and maintaining professional competence through continuous learning. • Balancing professionalism with empathy, ensuring interactions are both respectful and supportive.		
B7	Respond and adapt to work demands and situations.	IPE
An Energy Manager is flexible and resilient, capable of adjusting to changing priorities and unexpected challenges. This involves for example: • Prioritising tasks effectively to manage multiple demands and deadlines. • Remaining calm and focused when faced with unexpected issues or emergencies related to energy systems. • Proactively identifying potential problems and developing contingency plans. • Demonstrating resilience by maintaining performance and motivation during periods of high pressure or organisational change. • Seeking support and resources when necessary, recognising that adaptation		

Ref	KSB to be assessed	Assessment Method
	also involves collaboration and shared problem-solving. • Adjusting communication and collaboration styles to suit different stakeholders and evolving workplace dynamics. • Balancing short-term urgent demands with long-term strategic goals to ensure sustainable outcomes. • Learning from experiences and applying insights to future situations, demonstrating continuous growth. • Remaining open-minded and solution-focused, even when initial approaches need to be re-evaluated or replaced. • Embracing new technologies, policies, and methodologies in energy management as they emerge.	

Open Awards Policies

Current versions of the following Open Awards policies are accessible through the Secure Portal.

These policies include:

- End-Point Assessment Pricing Policy
- Reasonable Adjustments and Special Considerations Policy
- Data Protection
- Enquiries and Appeals Policy
- Complaints Policy
- Malpractice and Maladministration Policy
- Equality and Diversity Policy
- Sanctions Policy
- Safeguarding Policy
- Conflict of Interest Policy
- Fair Access Policy

In addition, the current version of the following relevant document may be obtained by training providers, employers or apprentices by contacting Open Awards directly:

- Instructions for Conducting Controlled Assessment Remotely

Support

For information about Open Awards support offer, including information on our policies, quality assurance, re-sits, appeals, complaints and general enquiries, please see our website: www.openawards.org.uk or contact our customer service team on 0151 494 2072 or via email at enquiries@openawards.org.uk.

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