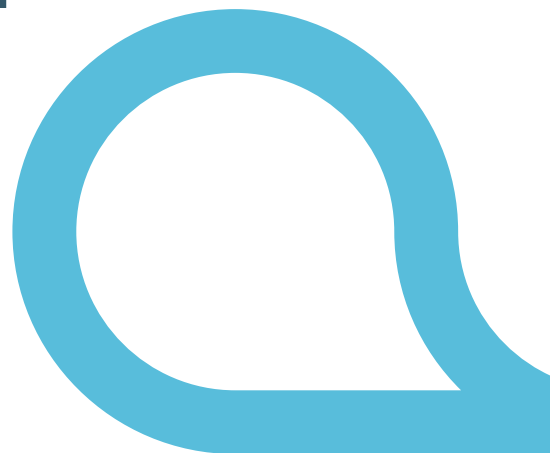




Next Generation Quality Management for **Retrofit Projects**

Powering domestic retrofit



Trade Engine: Our background

An established leader in retrofit solutions, Trade Engine have provided project management, compliance and installation solutions within the UK's Energy Efficiency sector since 2014. We work for and on behalf of energy and utility companies, local authorities, housing associations and retrofit organisations. We also support private domestic clients with home energy upgrades and cover all government-funded retrofit home improvement schemes.

Our work involves the specification, design, coordination, and oversight of retrofit projects, and is underpinned by our popular software-based Quality Management System (QMS), process automation tools and client portals. These allow the delivery of retrofit schemes by our installer network in a robust and scalable way. Combined with the expertise of our support teams, we work to ensure compliance at every stage of the retrofit project lifecycle.

Trade Engine has helped over 2,000 companies achieve PAS 2030 and supported PAS 2035 management for multiple major retrofit programmes. We also provide automated aspects of PAS 2035 compliance to allow fabric-first, whole-house retrofit programmes to be delivered at scale.

We have also been a top scoring, quality driven installer for over 12 years, with a specific focus on solid wall insulation.

Trade Engine's main areas of focus are:

- Retrofit Coordination to PAS 2035
- PAS 2030, MCS and PAS 2035 Managed Compliance
- Quality Management Systems (QMS) for PAS 2030, MCS and PAS 2035
- Packaged solutions for achieving and operating within PAS compliance
- Retrofit Assessor and Retrofit Installer training
- Framework Contracting of installation work
- Administering ECO4, ECO+, Social Housing Decarbonisation (SHDF) and associated Government funding schemes
- Direct delivery as an installer of building fabrics and services measures, with a focus on solid wall properties

The key principles of
*quality, transparency and
integrity* are central to all our
business' operations



Complete end-to-end compliance solutions

We are unique in our combination of practical experience of the PAS frameworks as both an installer and programme coordinator. Together with our in-house IT expertise, Trade Engine's capability to support those working within PAS is built on very firm foundations.

With our complete end-to-end QMS specifically designed to support whole-house retrofit of homes to PAS compliance, Trade Engine offers a comprehensive range of service packages that enable organisations to implement a quality management framework across their existing processes and systems to adapt to PAS 2030 and PAS 2035 criteria.

The Trade Engine QMS solutions cover the entire quality management lifecycle, from assessment, planning and design through assignment, deployment, monitoring, to review, measurement and analysis.

Our QMS solutions also include document control, non-conformance management, corrective and preventive actions (CAPA), auditing, planning, risk management, training, supplier management, analytics, reporting and end user satisfaction and feedback.

We offer a succession of QMS and project solutions that escalate in scope to fit the stage your business is at and the services for which you need support:

1. Foundation – assisting PAS 2030 or MCS certification
2. Extended – offering additional support for PAS 2030 or MCS accreditation and operation
3. Enhanced – complete management and oversight of PAS 2035 projects
4. Enterprise – a fully outsourced management service for the delivery of PAS-compliant retrofit projects at scale

In your **free initial consultation**, a member of our team will help you determine which solution is right for you, taking into consideration factors such as ease of integration, scalability, regulatory requirements, and stakeholder management. We will then offer a formal proposal response and plan.

Accreditation to PAS 2030 or MCS for your retrofit or renewables business is essential. Certification to the standard opens the door to a substantial portion of the retrofit activity in the market, particularly that which is available with Government funding.

The process of gaining accreditation can appear daunting to achieve and onerous to maintain, but with the right preparation and support, our expert team and universally recognised and approved tools, Trade Engine can set you on the road to being certified, quality assured and a compliant retrofit delivery organisation.

Take a look at our range of PAS and MCS services to see how we can help you thrive in this rapidly growing industry.



Our services at a glance

There has never been a more advantageous time to gain accreditation to PAS 2030 or MCS for your retrofit or renewables business. Certification to these standards opens the door to a substantial portion of the available retrofit activity in the market, particularly that section receiving funding support from the Government.

Trade Engine is here to help you do that and with our expert team and universally recognised and approved tools, we can set you on the road to certified, quality assured and compliant retrofit delivery.

Our systems and processes are continually updated to comply with the version of standard prevailing at any given time.



1 Foundation

Best suited for:

Installers of a small number of measures starting their journey into PAS 2030 or MCS

A fully compliant and proven QMS designed to support PAS 2030/MCS comprising:

- Needs-analysis and initial guidance
- Structured document control & storage
- Easy navigation, document upload and retrieval
- Process, policy and document templates
- Audit-friendly structure
- Advice, assistance and support
- Highly secure, managed and updated system
- Privacy legislation compliance

2 Extended

Best suited for:

Installers wishing to cover multiple measures under PAS 2030/MCS for the first time, needing additional resources to gain certification or those wishing to improve the efficiency of their compliant delivery

Everything in Foundation plus:

- Additional training sessions (2 hours)
- Assisted document check and creation
- Document upload
- Audit preparation and support
- Ongoing operational advice and guidance upon request
- Up to 4 users (typically)

3 Enhanced

Best suited for:

Retrofit coordinators, framework contractors and managing agents seeking to deliver whole retrofit projects more efficiently – typically single

Everything in Extended plus:

- End-to-end implementation of the PAS 2035 process
- QMS network structure
- Automated reasoning for Medium-term Improvement Plans
- Installer coordination via QMS
- Automated lodgement into Trustmark
- Receive and sequence installer outputs via QMS
- Standard template & approach for Retrofit Design

4 Enterprise

Best suited for:

Installers wishing to cover multiple measures under PAS 2030/MCS for the first time, needing additional resources to gain certification or those wishing to improve the efficiency of their compliant delivery

Fully managed retrofit programme delivery including:

- Fully managed service for PAS 2035 compliant delivery
- Project scope definition and stock evaluation
- Risk pathway definition
- Retrofit coordination
- Production of all compliance planning (MTIP/IOE)
- Recommendation for whole-house treatment
- Formal Retrofit Design process
- Sub-contractor briefing
- Document coordination
- Project management
- Site quality supervision
- Documentation check
- Lodgement
- Post-installation monitoring and evaluation
- Management reporting
- Compliance reporting

1. Foundation

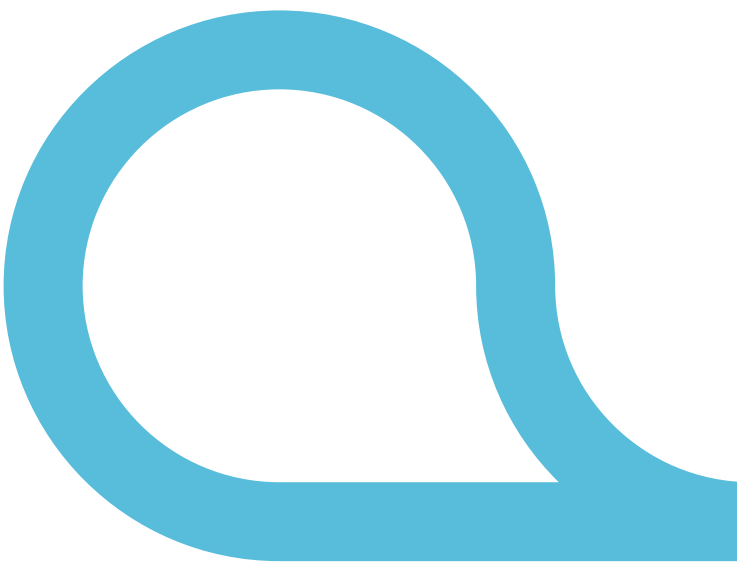
The foundation of achieving PAS or MCS accreditation and going on to deliver projects effectively and efficiently within the framework is the Quality Management System that you choose. The Trade Engine QMS was one of the first developed when these standards were introduced and has evolved and continually refined in parallel with their revision. Recognised and approved by all UKAS-accredited certification bodies for PAS and MCS and effective across all approved measures, the Trade Engine QMS is offered here in an easy to adopt package that gets you off to a confident start in preparing to become accredited.

Included in the package:

- Initial consultation to establish your business' requirements and completion of a 'gap analysis'
- Recommendation of the next steps to be taken to achieve and maintain PAS or MCS certification
- Full suite of policy, procedure, and document templates appropriate for all measures
- Easy navigation, with simple document upload and retrieval
- Document control and storage to facilitate consistent project by project documentation
- Reference library of all relevant standards and regulations, organised by measure class
- Indexed structure matched to the standard's delivery sequence
- Audit-friendly flow, supported by an Evidence Matrix to demonstrate compliance to External Auditors
- Supports of all required actions (such as collecting and lodging evidence)
- Highly secure, managed, and updated system remaining up to date with current revisions
- Privacy legislation compliance
- Single user licence and for up to 3 measures (additional measures can be added), provided on an annual subscription basis

Additional services available

- Document creation, per measure
- Document checking, per measure
- Document upload and distribution, per measure
- Audit support – before and during any external audit by a Certification Body or scheme
- Additional Training by Trade Engine consultant, topic upon request
- Additional user licences, per annum
- Additional measures, per annum



Feature

- ✓ Thoroughly tested & established in the market
- ✓ Intuitive framework
- ✓ Experienced & personable team
- ✓ Recommended by multiple UKAS-accredited Certification Bodies
- ✓ Continuous maintenance & updates
- ✓ Secure cloud platform that is GDPR compliant
- ✓ Seeking user feedback
- ✓ Indexed against accreditation standards
- ✓ Familiar to all auditors

Benefit

- ✓ Low risk to the client – application as instructed will ensure accreditation success
- ✓ Simple to implement and manage with minimum guidance and practice
- ✓ Assurance that support will be given when needed in a professional, supportive and friendly manner
- ✓ Recognised as an approved platform for PAS 2030 & MCS delivery across all of the certification bodies and schemes
- ✓ Continual updates ensure your business remains compliant with the standard at all times
- ✓ Security of commercial data and compliance with all prevailing data regulations
- ✓ Taking feedback from the user base across both standards and all measures ensures continual process improvement for all clients
- ✓ Easy to navigate and audit, with post-audit support available to ensure ongoing compliant delivery
- ✓ A well-trusted platform environment, so a great starting point for a straightforward, successful audit experience

The Foundation QMS package is ideal for those embarking on accreditation for the first time, but sufficiently familiar with the standards and requirements to just really need the platform and environment to operate within, needing only basic guidance Manage and operate their own internal QMS.

Additional support and capacity is always available upon request, or you may consider one of the other three packages that may better suit your organisation's needs.

2. Extended

Extending the Foundation package into a higher-support service version, to help those who need additional resource or to draw on substantial experience to achieve multiple or more complex accreditations. Sometimes it is better to have more help and support when you need it, to gain the maximum benefit from your PAS or MCS status.

Included in the package

- Everything included in the Foundation package, plus...
- Training sessions for your team (up to 2 hours included)
- Assisted policy, procedure or document creation, where no existing version exists already within your business
- Assisted policy, procedure or document checking (and adaption where required) of any existing processes, ensuring compliance
- Document upload to the platform by a Trade Engine QMS consultant
- Preparation for and live support during the accreditation audit
- Ongoing operational advice and guidance upon request
- Up to 4 users and up to 5 measures

Additional services available

- Annual Internal Audit to ensure accreditation renewal without stress
- Managed internal auditing (scheduled) – 2 hours a month, to ensure ongoing quality control
- Assistance with regular reporting activities to your Certification Body
- Additional user licences, per annum
- Additional measures, per annum

Additional Feature

- ✓ Specialist training content
- ✓ Document check or creation
- ✓ Document upload

Benefit

- ✓ Increased knowledge for newcomers to PAS/MCS greatly increases success in accreditation and effective programme management under the standard
- ✓ Makes certain there are no gaps in documentation and that the policies and processes are perfectly aligned against the assessed criteria
- ✓ Reduces internal administration time allowing a focus on on-site installation quality in preparation for the initial audit

The Extended package is ideal for those who feel they need a full induction into PAS or MCS, particularly where time is short, immediate success is critical, or internal resources are limited.

The additional support included in the package also helps those who need to manage more complex situations such as multiple measure application, multiple standards accreditation (PAS & MCS at the same time) or complex existing demands on management resources. Trade Engine is here to make the journey more certain, less stressful, and far more efficient.



3. Enhanced

With the introduction of PAS 2035:2019 in 2020, a new dimension to the management of compliant retrofit projects was introduced to all parties involved in their delivery.

Trade Engine were immediately engaged and ensured that the team were suitably trained to the various roles within the new standard. As a result the organisation gained practical experience of delivering programmes to PAS 2035 and this, combined with a long heritage in supporting PAS 2030, enabled them to identify the need to have a QMS to act as the 'single point of truth' to facilitate the delivery of whole-house, fabric-first retrofit at scale.

Our Enhanced QMS package was created to link with installers operating their own QMS and enable retrofit coordinators and managing contractors to seamlessly connect the flow of both standards, with automation where possible, and enable an overview to be created for effective, on-time volume delivery with a quality focus.

Included in the package:

- PAS 2035 capability for process control and coordination
- Ability to connect seamlessly to the PAS 2030 QMS environment to create a quality framework for all stakeholders involved in delivery
- To instruct installers formally via the QMS
- To gather and process submitted materials from installers via the QMS
- To create the single point of truth and reference for each property
- Correlation of physical progress with quality attainment
- Full audit trail for all roles and activities.
- Effective version control
- Automated reasoning for Improvement Option Evaluations (IOE) and Medium-Term Improvement Plans (MTIP)
- Standard package and content specification for the Retrofit Design (RD), including revisions management
- Automated lodgement of projects to Trustmark
- Training for users by Trade Engine consultant (also a qualified Assessor or Coordinator)
- Security, data privacy standards and update/maintenance routines as per our Foundation package

Additional services available

- Automated lodgement to the TrustMark Data Warehouse on a per-property and per-measure basis
- Additional PAS 2035 users
- Additional PAS 2030 users, per measure
- Additional Trade Engine consultant support, per hour
- Additional Retrofit Assessor support, per hour
- Additional Retrofit Coordinator support, per hour



Feature

- ✓ 'Single point of truth'
- ✓ End-to-end logic flow for PAS 2035 delivery
- ✓ Dashboard reporting
- ✓ Quality assessment dimension
- ✓ Problem and corrective action process (CAPA)
- ✓ Full document library for coordination best practice
- ✓ Qualified support
- ✓ Automated lodgement into Trustmark
- ✓ Supported workflows for scalability

Benefit

- ✓ Creating the system of record for complex project environments with the capability to be rigorously audited against the standards
- ✓ Matched to reflect the exact requirements to the standard and designed to guide the user to the appropriate pathway and action sequence according to the information input
- ✓ Enabling the effective tracking of project progress in relation to quality standards met
- ✓ Dynamic and graphical reporting facilitating updates to clients or live continuous access, as required
- ✓ Based on the required inputs for project checking, creates an ongoing check on quality indicators by property, measure and installer that can be rolled up to project level through a user-defined hierarchy
- ✓ 'Flags' created by the quality assessment functionality can immediately identify the need to check an item, rework or improve before such issues can accumulate and prevent project sign-off later
- ✓ Always have a best-practice guide to hand in a single location, together with up-to-date regulations and standards criteria
- ✓ Where qualified external input can help, it is a click or call away from the expert Trade Engine team
- ✓ Facilitating operation at scale, this automation removes a crucial but repetitive manual task and frees up time for quality assurance
- ✓ Similarly, across the entire workflow, links are made, connections are highlighted, and duplication of effort minimised by dynamic logic and automation wherever it is appropriate to apply

The Foundation QMS package is ideal for those embarking on accreditation for the first time, but sufficiently familiar with the standards and requirements to just really need the platform and environment to operate within, needing only basic guidance Manage and operate their own internal QMS.

Additional support and capacity is always available upon request, or you may consider one of the other three packages that may better suit your organisation's needs.

4. Enterprise

If you are looking to completely outsource the management of your retrofit projects, Trade Engine has the expertise to deliver for you. We provide a full management service within our Enterprise package. From stock analysis right through to programme evaluation, let Trade Engine take the strain and deliver your funded programme to the highest quality available in the sector.

Trade Engine has expertise and a track record of success, having delivered numerous large-scale retrofit projects to the PAS 2035 standard. We effectively take control of your compliance management requirements and integrate seamlessly with your organisational systems and processes with full and transparent visibility, so you are always aware of how the retrofit programme is performing. We create a 'single-point-of-truth' through the application of our optimised QMS and this enables us to automate that which may be automated within compliant delivery to maximise resource efficiency. This means that PAS 2035 can be operated more comfortably and efficiently at scale. In turn, more focus can be given to the constant maintenance of quality at point-of-installation, de-risking the project legacy and reassuring clients.

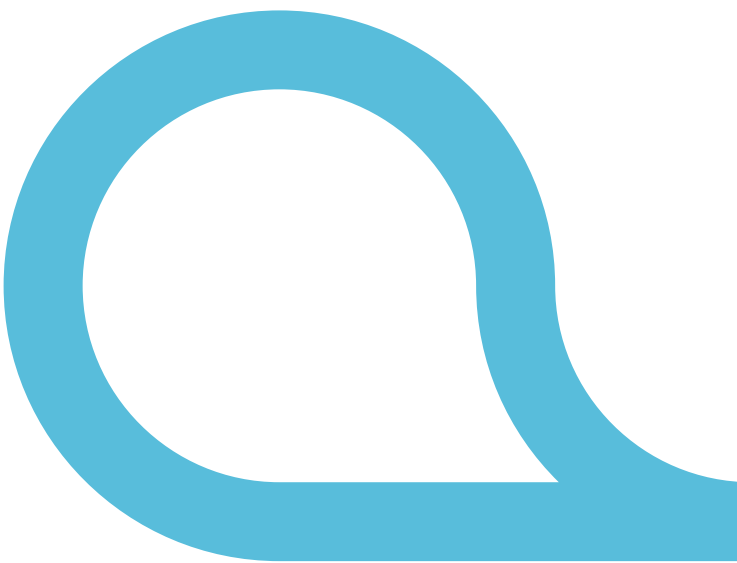
Our Enterprise solution is perfect for organisations that must focus on delivering core business services, but want confidence that their compliance management requirements are in safe and capable hands.

Included in the package:

- Fully managed service for PAS 2035 compliant delivery
- Utilising the Trade Engine technology platform and our fully qualified PAS 2035 team
- Stock analysis and target prioritisation for maximum impact
- Retrofit Assessment
- Ventilation and condition assurance
- Risk pathway definition and triage
- Retrofit coordination
- Production of all compliance planning
- Recommendation for whole-house treatment
- Retrofit Design Sub-contractor instruction and management
- Document and evidence coordination
- Project management
- Site quality supervision
- Documentation check
- Reporting to funding bodies as required
- Lodgement into the TrustMark Data Warehouse
- Query handling
- Ongoing Monitoring and Evaluation
- Management reporting
- Compliance reporting

Additional services available

- Customer awareness support (measure agnostic – energy efficiency focussed)
- Customer feedback gathering and analysis
- Installer quality evaluation
- Ongoing retrofit performance monitoring using IoT technologies
- Performance reporting – actual versus projected
- Future planning for non-funded enhancements



Feature

- ✓ Fully PAS qualified team to support project delivery within the standard
- ✓ Automation of key processes
- ✓ Full audit trail on all project elements
- ✓ Dynamic reporting on delivery progress vs quality control
- ✓ Retrofit Coordinator attendance at site every week
- ✓ Experience as an installer

Benefit

- ✓ Assurance that all aspects of compliance will be monitored and addressed, and the project legacy will be de-risked substantially
- ✓ Facilitating the efficient delivery of the PAS 2035 standard at scale whilst maintaining the individual property whole-house integrity
- ✓ As all projects will be inspected for quality of delivery at some point, our delivery methods are optimised for later inspection and scrutiny
- ✓ Keeping the client up to date with progress and quality attainment reduces their anxiety about outcomes and means less time on customer management
- ✓ Quality focus with accountability, avoiding costly at-a-distance assumptions
- ✓ Trade Engine understand the on-the-ground challenges of every element of programme delivery, respect the installers' perspective and start every task with consideration to the impact on the householder – the ultimate beneficiary of all of our efforts

Our Enterprise fully managed package is best suited for Retrofit Programme providers looking for total support to manage efficient retrofit programme delivery at scale to full PAS 2035 compliance. Outsourcing project management may also be beneficial to organisations that find themselves responsible for this sort of programme of works but don't have the necessary resources or expertise to reach compliance standards, whilst maintaining a quality focus on their core business services.

Our Enterprise solutions also support organisations that are in a transition such as growth, merger, acquisition or regulatory changes that will draw resources away from quality project management.

The starting package licence is for a single retrofit team comprising 3 x Retrofit Assessors, 1 x Retrofit Designer, and 1 x Retrofit Coordinator for the duration of the programme of work. PAS 2030 packages additional where required.

QMS checklist

Trade Engine QMS checklist for an effective and quality led QMS solution:

- ☐ QMS document control and storage systems
- ☐ Regulatory and non-conformance compliance
- ☐ Quality workflow and tracking systems
- ☐ Contract and resources templates
- ☐ Training and competency plans
- ☐ Supplier management and conformance
- ☐ Evidence of measure installations
- ☐ Continuous development and improvement plans
- ☐ Health and safety planning, monitoring and reporting
- ☐ Customer engagement & handover procedures
- ☐ Auditing, risk, and assessment processes
- ☐ Management and reporting processes



Additional retrofit services

Trade Engine’s core solutions packages are a key part of our overall whole-house retrofit solutions offering, but our portfolio for programme-related guidance and support is wider.

If you require any of the following services, please contact us at info@tradeengine.co.uk. A member of the team will respond quickly.

Alternatively, book a free 30-minute consultation by registering here:
www.tradeengine.co.uk/retrofithelp



- ✓ Whole-house retrofit solutions
- ✓ QMS solutions for PAS 2035, PAS 2030 and MCS
- ✓ Government funding eligibility and applications
- ✓ PAS 2030, PAS 2035 and MCS implementation training
- ✓ Retrofit Assessor and Retrofit Coordinator support training
- ✓ Project management and framework contracting
- ✓ Advice on certification, including choosing a Certification Body
- ✓ Design and installation of building fabrics and building services measures
- ✓ QMS and retrofit auditing services
- ✓ PAS Toolkit and updates service

From stock analysis, through delivery, to retrofit programme evaluation, Trade Engine can provide the platform to manage your projects in a compliant manner and can even manage the project for you on a wholly outsourced basis.

Contact us today to start your journey towards fully compliant domestic retrofit.



Your best fit for Retrofit

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