

Contents	Page
1 Introduction.....	2
2 Scope.....	3
3 Examination and Training Providers.....	3
4 Who can apply?	5
5 Open to all.....	5
6 Technical Requirements.....	5
7 Confidentiality and impartiality	6
8 Information disclosure.....	7
9 Certification & Listing on the Register	7
10 Application	7
11 Inform CIBSE Certification	9
12 Fees	9
13 Use of the CIBSE Certification certificate and certification marks/logo.....	10
14 Suspension and Withdrawal of Certification.....	10
15 Respite from the Certification and Registration schemes.....	10
16 Complaints about CIBSE Certification	11
17 Changes to certification scheme requirements.....	11

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	1

1 Introduction

This certification scheme is intended for those Management System Consultants who wish to be registered as a Management Systems Specialist by CIBSE Certification Ltd. This scheme offers verification of competence for consultants competent to:

- Help implement Quality Management Systems to EN ISO 9001
- Help implement Environmental Management systems to ISO 14001
- Help implement Health & Safety Management to ISO 45001

ISO 9001

ISO 9001 can help businesses establish the systems and processes necessary to improve their performance, to meet regulatory requirements, and meet client expectations. This can help improve system performance, improving efficiencies, save money and improve customer satisfaction through systematic management of business processes.

ISO 9001 specifies requirements for a management system to enable management system specialists help, develop and implement a policy and objectives which take into account legal requirements, customer requirements and ensure customer expectations and business objectives are achieved.

It is a useful document for all types and sizes of organisations and accommodates diverse geographical, cultural and social conditions. This standard applies to the activities under the control or influence of an organisation involved in producing a product or service.

ISO 9001 can be used independently or integrated into already existing management systems; its structure and requirements will be familiar to users of ISO 14001, ISO 45001 and ISO 50001.

Third party Certification of your abilities with regard to ISO 9001 can be used to demonstrate your competence to interested parties such as potential clients and/or employers.

ISO 14001

ISO 14001 can help businesses establish the systems and processes necessary to improve their Environmental performance, to help protect the environment, and to meet regulatory requirements. This can help improve system performance, improving efficiencies, and save money through reduced waste and improved recycling of materials.

ISO 14001 specifies requirements for a management system to enable management system specialists help to develop and implement a policy and environmental objectives which take into account legal requirements and ensure stakeholders expectations and business objectives are achieved.

It is a useful document for all types and sizes of organisations and accommodates diverse geographical, cultural and social conditions. This standard applies to the activities under the control or influence of an organisation.

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	2

ISO 14001 can be used independently or integrated into already existing management systems; its structure and requirements will be familiar to users of ISO 9001, ISO 45001 and ISO 50001.

Third party Certification of your abilities with regard to ISO 14001 can be used to demonstrate your competence to interested parties such as potential clients and/or employers.

ISO 45001

ISO 45001 can help businesses establish the systems and processes necessary to improve their Health & Safety performance, to keep workers safe and to meet regulatory requirements. This can help improve system performance, improving efficiencies, save money through reduced absenteeism, and improve employee safety and retention.

ISO 45001 specifies requirements for a management system to enable management system specialists help to develop and implement a policy and objectives which take into account legal requirements, workers requirements and ensure stakeholders expectations and business objectives are achieved.

It is a useful document for all types and sizes of organisations and accommodates diverse geographical, cultural and social conditions. This standard applies to the activities under the control or influence of an organisation.

ISO 45001 can be used independently or integrated into already existing management systems; its structure and requirements will be familiar to users of ISO 14001, ISO 9001 and ISO 50001.

Third party Certification of your abilities with regard to ISO 45001 can be used to demonstrate your competence to interested parties such as potential clients and/or employers.

2 Scope

This scheme provides an ongoing independent, third party assessment and certification of an individual's competence to provide the services listed in 0 above.

Such competence is demonstrated and maintained in accordance with the requirements of this Scheme Description Document.

3 Examination and Training Providers

3.1 Examination and Training Providers

Examination and training providers are readily available through numerous training providers:

3.2 Approved Courses

3.2.1 Quality Management System

IRCA Accredited ISO 9001 training courses are widely available in the market. Non IRCA Accredited Courses may also be considered as an alternative/ equivalent but all training

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	3

courses must include an assessment of competence by a third party.

Examples would be:

- 5 day ISO 9001 Quality Management System Lead Auditor Course
- An IRCA approved ISO 9001 Quality Management System Course with a minimum of three days of attendance.

CIBSE Certification reserve the right to refuse, at its sole discretion, to accept any course where there is any doubt regarding its equivalence of a 5 day lead auditor course.

Building Services training courses and guidance documents are widely available on the market e.g. <https://www.cibse.org/> and these guides and courses can be referenced to help demonstrate competence in the Building Services arena.

3.2.2 Environmental Management System

IRCA Accredited ISO 14001 training courses are widely available on the market. Non IRCA Accredited Courses may also be considered as an alternative/ equivalent but all training courses must include an assessment of competence by a have third party.

Examples would be:

- 5 day ISO 14001 Environmental Management System Lead Auditor Course
- An IRCA approved ISO 14001 Environmental Management System Course with a minimum of three days of attendance.

CIBSE Certification reserve the right to refuse, at its sole discretion, to accept any course where there is any doubt regarding its equivalence of a 5 day lead auditor course.

Building Services training courses and guidance documents are widely available on the market e.g. <https://www.cibse.org/> and these guides and courses can be referenced to help demonstrate Environmental knowledge, and competence in the Building Services arena.

Example of other training which would be considered:

- IEMA Environmental training modules

3.2.3 Health & Safety Management System

IRCA Accredited ISO 45001 training courses are widely available in the market. Non IRCA Accredited Courses may also be considered as an alternative/ equivalent but all training

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	4

courses must include an assessment of competence by a have third party.

Examples would be:

- 5 day ISO 45001 Health & Safety Management System Lead Auditor Course
- An IRCA approved ISO 45001 Heath & Safety Management System Course with a minimum of three days of attendance.

CIBSE Certification reserve the right to refuse, at its sole discretion, to accept any course where there is any doubt regarding its equivalence of a 5 day lead auditor course.

Building Services training courses and guidance documents are widely available on the market e.g. <https://www.cibse.org/> and these guides and courses can be referenced to help demonstrate Health & Safety knowledge, and competence in the Building Services arena.

Examples of the type of other training courses which would be considered:

- NEBOSH General training modules
- IOSH Training Modules

4 Who can apply?

Any individual can apply for Certification under this scheme, you can apply for one strand or more. They will be required to demonstrate the required competencies.

It is important to note that this scheme is open to anyone who can demonstrate the required competencies and wishes to be certified as a Management Systems Specialist and to appear on the Management Systems Specialist Register.

Note: Assessment of competence is mandatory during the application process and on an ongoing basis throughout the certification period e.g. through self-development/continuing professional development.

5 Open to all

Our Personnel Systems Certification scheme is open to anyone who can demonstrate the required competencies that wishes to be assessed, certified and registered under this scheme.

Please let us know in advance if you have any relevant special needs or requirements that you think we should know about when processing your application. Any information you pass to us will be treated in confidence.

6 Technical Requirements

All applicants for Certification and Registration under this scheme must fulfil all of the application requirements of this scheme description document. The assessment will be based on the following overarching learning outcomes:

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	5

Implementing ISO 9001:

- a) Demonstrating an understanding of the requirements of ISO 9001 (Version as current at date of assessment).
- b) Demonstrating an understanding of the steps to plan and successfully implement an ISO 9001 compliant Management System.
- c) 2 Years experience implementing and operating an ISO 9001 compliant Management System in the Building Services arena.
- d) Demonstrating sufficient knowledge of the regulations and guidelines appropriate to Building Services.

Implementing ISO 14001:

- e) Demonstrating an understanding of the requirements of ISO 14001 (Version as current at date of assessment).
- f) Demonstrating an understanding of the steps to plan and successfully implement an ISO 14001 compliant Management System.
- g) 2 Years experience implementing and operating an ISO 14001 compliant Management System in the Building Services arena.
- h) Demonstrating sufficient knowledge of the regulations and guidelines, aspects and impacts as appropriate to Building Services.

Implementing ISO 45001:

- i) Demonstrating an understanding of the requirements of ISO 45001 (Version as current at date of assessment).
- j) Demonstrating an understanding of the steps to plan and successfully implement an ISO 45001 compliant Management System.
- k) 2 Years experience implementing and operating an ISO 45001 compliant Management System in the Building Services arena.
- l) Demonstrating sufficient knowledge of the regulations and guidelines, risks and hazards as appropriate to Building Services.

Once certified, compliance with all other requirements in this scheme description document must be maintained along with any other requirements imposed by CIBSE Certification in the future of which you will receive due notice.

7 Confidentiality and impartiality

Policies and procedures have been defined and developed to help ensure all aspects of the certification processes and activities are carried out in an honest, impartial and unbiased manner that is fair and equitable for all applicants. All applicable legislative and statutory requirements will be complied with at all times in the performance of certification activities.

Certification is never restricted on the grounds of undue financial or other limiting conditions, such as membership of an association or group unless the scheme owner sets such a restriction. We never use procedures to unfairly impede or inhibit access by applicants and candidates to our certification schemes.

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	6

All certification requirements, evaluations and decisions will be based only on the defined criteria and no outside influence will be considered e.g. those from commercial, financial or other pressures to compromise impartiality.

8 Information disclosure

We may disclose information about you where there is a legal requirement to do so or where information is already in the public domain. Once you have been granted certification we will also disclose information related to that certification on our website. We will include details of your organisation e.g. name, address, phone, email and also the scope of the certification granted. Along with this we may include information regarding the status of your certification e.g. if it is suspended or withdrawn. In some special cases we can withhold information at your request but only if there are clear reasons to do so e.g. security or safety reasons.

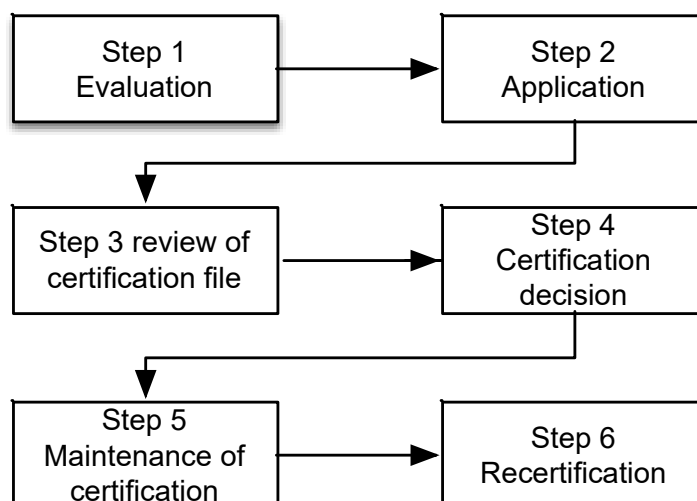
9 Certification & Listing on the Register

In order to become certified and to appear on the Register you will be required to make an application for certification and registration using the process described below.

Initial certification is for a period of three years, contingent upon complying with all maintenance requirements that must be met.

10 Application

10.1 General Process



10.1.1 Step 1 – Evaluation

In order to become certified and to join the register you will be required to pass an examination/examinations or evaluation taken under controlled conditions for which you are strongly advised to take appropriate training. The learning outcomes to be assessed are based on those listed in Section 6 above.

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	7

10.1.2 Step 2 – Application

All applications for certification and listing on the register are checked to ensure the individuals eligibility and that the necessary declaration has been signed.

Once in possession of your examination pass confirmation from the exam provider (usually in the form of a letter or certificate), individuals may apply to CIBSE Certification Ltd for certification and listing on the register by completing the relevant application form.

Additionally, you will need to:

- Provide evidence of your professional indemnity insurance
- Sign the CIBSE Certification Code of Conduct
- Sign a declaration that you will act only within your own areas of competence and that you will abide by all CIBSE Certification scheme rules for your chosen register(s)

Please let us know in advance if you have any relevant special needs or requirements.

10.1.3 Step 3 - Certification file review

A full and comprehensive review of all the information provided is performed to determine whether all of the requirements for certification have been met. The outcome of this review is either a recommendation for certification, a request to provide additional information or in some circumstances a rejection.

10.1.4 Step 4 - Granting of certification

Once it is confirmed that all the information required has been collected and reviewed by CIBSE Certification a decision regarding certification will be made. You will be informed regarding this decision and if it is positive you are added to the appropriate register and your certification documents issued.

Initial certification is for a period of three years with an annual fee and maintenance requirements that must be met.

Certification will not be granted until:

- Certification fees have been paid
- Confirmation has been verified of passing of the approved Management Systems examination (or equivalent) and demonstrating the required experience and competencies.

A certificate of registration will be issued; the certificate will detail the following:

- Name and address of Management System Specialist – Health & Safety Management Systems
- Date of issue
- Expiry date – nominally 1 year from the date of issue
- The scope of certification i.e.
 - Implementation of Health & Safety Management Systems to ISO 45001

Note: Certificates always remain the property of CIBSE Certification.

In addition to being issued with a certificate, the details of your certification and certificate number are made accessible to the public through the CIBSE Certification Limited website.

Such public listing is a mandatory requirement of Personnel Certification by CIBSE Certification.

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	8

10.1.5 Step 5 - Maintenance of Certification and website listing

Certification is maintained and reviewed annually. In order to remain certified CIBSE Certification will require all registered persons to complete the following Surveillance activities on an annual basis:

- Submit a register of any complaints received and action taken for resolution
- Submit up to date Professional Indemnity Insurance (PII) if expired
- Submit CPD records in accordance with CCP 111

Failure to comply with these requirements may lead to suspension and/or withdrawal of certification.

10.1.6 Step 6 - Recertification

All personnel certification expires after three years.

To achieve recertification an assessment of ongoing competence will be undertaken. Recertification assessment will include an assessment of continuing competence - this may be an examination or other form of assessment that must be passed prior to confirmation of recertification, alternatively a review of your activities, including CPD, over the 3 year certification period may be appropriate.

You will also need to have complied with all maintenance requirements in Section 10.1.5, CIBSE Certification will inform you of the requirements as necessary.

11 Inform CIBSE Certification

11.1 Other Changes of Details

Certified individuals shall inform CIBSE Certification in writing (i.e. letter, fax, or email) within 14 days should any of the following change:

- Name
- Address
- Employer
- Trading status
- Trading name
- Company ownership
- Change in Professional Indemnity Insurance (PII) e.g. provider, extent of cover
- Any other significant change that may affect their certification including any doubt regarding your own ongoing competence
- Changes that affect your ability to meet the certification requirements of this scheme description document

If in doubt please contact us to discuss the change and any consequences for your ongoing certification.

12 Fees

All fees are payable at the time of application for certification therefore all applications must be accompanied by the appropriate fee payable by cheque, credit card etc.

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	9

The fees for certification and inclusion on the registers are contained on the CIBSE Certification website at the following address: <https://www.cibsecertification.co.uk>

Registration fees are renewed annually.

13 Use of the CIBSE Certification certificate and certification marks/logo

There are restrictions on the use of the CIBSE Certification scheme marks. These restrictions are described in document CCP 109 Use of Certification Marks.

To assist you in the use of the logos a Style Guide is available, containing the logos and the rules for their use, only to those currently certified by CIBSE Certification. These are given in the following document:

- CCP 155 – Management Systems Specialist Style Guide

14 Suspension and Withdrawal of Certification

All certified and registered persons must remain compliant with the certification scheme requirements.

When a certified and registered person fails to meet certification scheme requirements their certification may be suspended or withdrawn.

It should be noted that withdrawal might also be a voluntary process.

15 Respite from the Certification and Registration schemes

15.1 Policy

CIBSE Certification will allow a period of self-declared voluntary inactivity from the Register after which you will be allowed to resume your certification where you left off. This will be administered on a case-by-case basis and will be subject to certain conditions. In all cases CIBSE Certification will make all efforts to be reasonable and fair.

Reasons that may be considered acceptable include, but are not limited to:

- Maternity leave
- Long term incapacity due to illness or disability (physical or mental)
- Emotional distress
- Redundancy
- Overseas posting

15.2 Conditions

- 1) Respite can be requested for a period of up to 12 months
- 2) The respite period shall start on a date that you indicate to the Certification Systems Manager and you must give at least 4 weeks' notice
- 3) During that time you must have no ongoing involvement in building services engineering in the UK other than training/CPD
- 4) No more than one period of Respite shall be permitted sequentially
- 5) If after 12 months you do not resume your certification it shall be regarded as lapsed
- 6) It is your responsibility to ensure that at the end of the Respite period you contact CIBSE Certification to ensure ongoing certification and registration

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	10

- 7) During Respite you may take part in training and CPD activities at your own discretion
- 8) If as a result of a period of Respite you miss out on update training then you will have to take appropriate training and examination (where appropriate this may include taking the full course) to gain the necessary competencies to maintain certification
- 9) You will need to make your Annual Returns for the period of Respite; a nil return stating that you have been on Respite will be acceptable, where appropriate
- 10) CIBSE Certification reserve the right to refuse a period of Respite and reasons for that will be provided to you
- 11) The Respite request will be recorded on our internal databases

15.3 How to apply for respite

In the first instance you should write to the Certification Systems Manager, in confidence, stating:

- Your reasons for requesting Respite
- The period of time you require
- Your proposed Respite start and end date

The Certification Systems Manager will respond to all applications within 7 days for simple cases, however for more complex cases this may be extended to 21 days.

16 Complaints about CIBSE Certification

CIBSE Certification operates a dispute and complaints procedure (CCP 101) that any individual (i.e. those that are potential, current, suspended or withdrawn from certification) may invoke at any time e.g. should they feel that:

- They have received poor service
- They have been refused entry to a scheme unfairly
- They have been excluded from the scheme unfairly
- That complaints against them have been unfairly upheld

17 Changes to certification scheme requirements

Over time there are like to be changes to the certification scheme requirements. Some of these changes may require additional assessment to enable your certification to remain extant.

Whether or not a change will require additional assessment CIBSE Certification will always give you as much notice as possible of all changes and make information publicly accessible when it is appropriate to do so.

We will also ensure that the requirements for any further assessment for the maintenance or renewal of certification are communicated to you in a timely manner.

End/-

Document reference:	CCSDD 210	Approval:	R Chitnavis
Revision number:	1		
Issue date:	14/04/26	Page:	11