Passivhaus Trust
The UK Passive House Organisation

Passivhaus Certifier Scope of Services

UK Certifiers' Circle Guidance

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Version 1.1

> *I was working as a physicist. I read that the construction industry had experimented with adding insulation to new buildings and that energy consumption had failed to reduce. This offended me – it was counter to the basic laws of physics. I knew that they must be doing something wrong. So I made it my mission to find out what, and to establish what was needed to do it right.*
>
> **— Prof. Dr. Wolfgang Feist**

Acknowledgements

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http://bit.ly/PHTpatronmembers

Passivhaus certification

Over thirty years of experience demonstrates that the high levels of comfort and energy savings associated with the Passivhaus standard are achieved through independent quality testing. All certified Passivhaus buildings (including Classic, Plus, Premium, EnerPHit and the Passive House Institute Low Energy Building (PHI-LEB) standard) undergo a rigorous compliance process. Certification is also available for specific components, Designers / Consultants and Tradespeople.

UK Certifiers' Circle

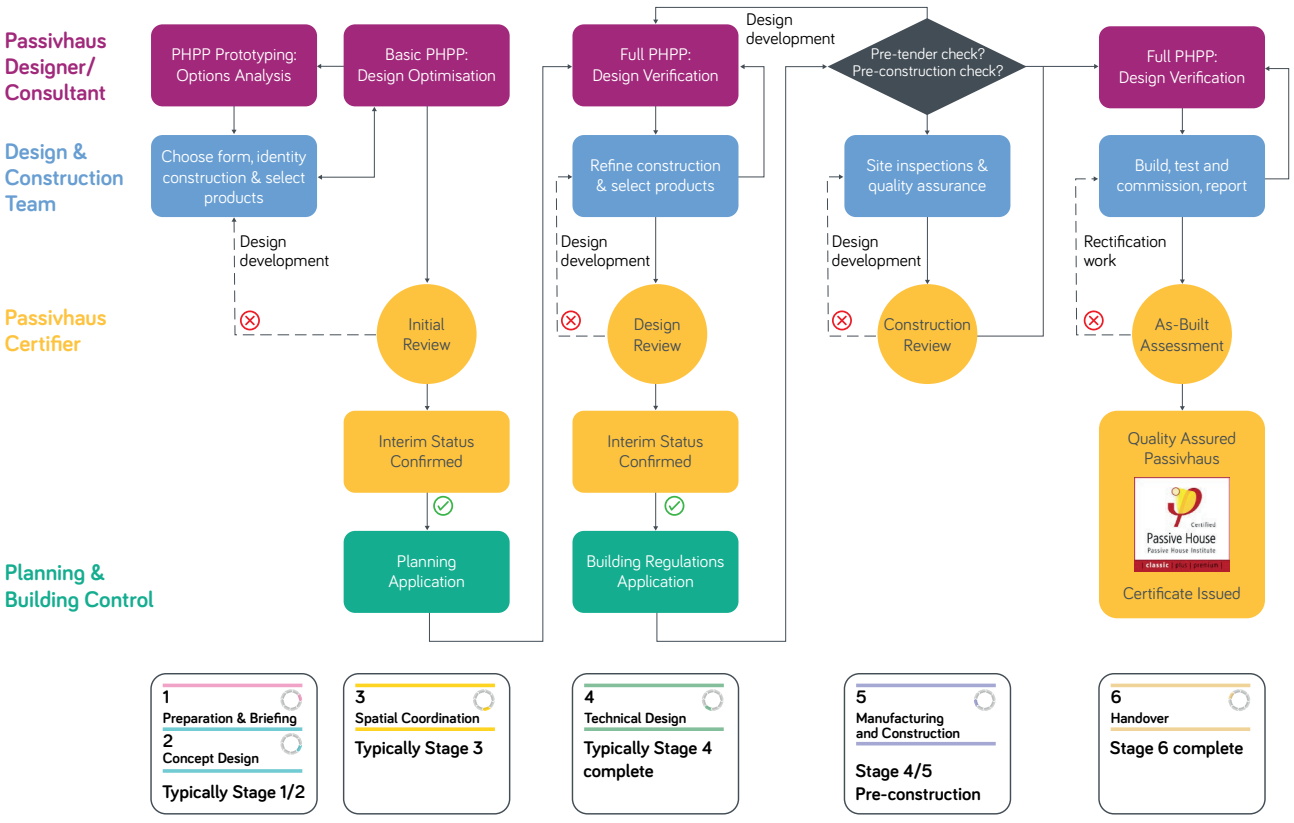
Passivhaus Certifiers are individuals who have been internationally accredited by the Passive House Institute (PHI) to certify Passivhaus buildings, EnerPHit retrofits and PHI Low Energy Buildings anywhere in the world on behalf of the Passive House Institute and in accordance with their criteria. Details of Passivhaus Trust members & partners who are part of the UK Certifiers' Circle and offer certification services provided by an accredited Passivhaus Certifier can be found on the Passivhaus Trust website, and the comprehensive list of all Passivhaus Certifiers worldwide is available on the Passive House Institute's website.

https://www.passivhaustrust.org.uk/certification.php#building%20certifiers

https://passivehouse.com/03_certification/02_certification_buildings/03_certifiers/01_accredited/01_accredited.html

Passivhaus Overlay for the RIBA Plan of Work

The image below is from the RIBA Passivhaus Overlay. This additional set of guidelines complements the standard RIBA work stages, offering specific guidance on achieving the Passivhaus standard in building projects. It helps teams integrate Passivhaus delivery and certification requirements into their design and construction processes to create highly energy-efficient and environmentally friendly buildings.



Passivhaus Certifier scope of services

This document provides a generic scope of services for Passivhaus certification. It offers an overview of the tasks and responsibilities typically involved in the certification process. The purpose of this document is to guide clients and design teams in understanding the essential components and expectations associated with achieving Passivhaus certification.

The scope of services presented here is designed to be adaptable and applicable to various project types and scales. Specific project requirements and contractual agreements may require adjustments and additions to this generic scope of services. This document serves as a starting point for discussions and agreements between project teams and certification bodies regarding roles, responsibilities, and expectations for achieving Passivhaus certification.

While this generic scope of services offers an overview, it is crucial to consult with a certified Passivhaus Designer/Consultant and/or Passivhaus Certifier to tailor the scope to the specific needs and requirements of each project. Their expertise will help navigate the intricacies of the certification process and ensure successful delivery of a Passivhaus project.

Collaboration and communication among all project stakeholders are vital for the effective delivery of a Passivhaus project and the successful achievement of Passivhaus certification.

Table 1 sets out a generic scope of services for a Passivhaus Certifier, following the RIBA Plan of Work Passivhaus Overlay, comprising:

1. Initial Review
2. Design Review
3. Construction Review
4. As-built Assessment
5. Certification

Table 2 outlines additional consultancy services that a Passivhaus Certifier may offer.

This scope assumes that the Passivhaus Designer/Consultant will be the main contact for collecting and forwarding design and construction evidence to the Certifier. Information for review is to be uploaded by the Passivhaus Designer/Consultant to the PHI online platform.

Appointment

The Passivhaus Certifier should be appointed directly by the client or client representative for the duration of the project. The Certifier should be impartial and independent. Typically, this will mean a non-novation contract, with the Certifier staying client side during construction.

The scope of services and appointment is typically for the whole project; however, fees are broken into stages, and services can be stopped if the project does not proceed with Passivhaus certification.

Terms and conditions

Terms and conditions are the responsibility of the Passivhaus Certifier and should be issued to accompany the scope of services.

Exclusions

Exclusions, beyond those listed in the scope of services, are the responsibility of the Passivhaus Certifier and should be issued to accompany the scope of services.

Further information

The full Passivhaus criteria and accompanying guidance are published by the Passive House Institute and available online via:

https://pht.guide/criteria

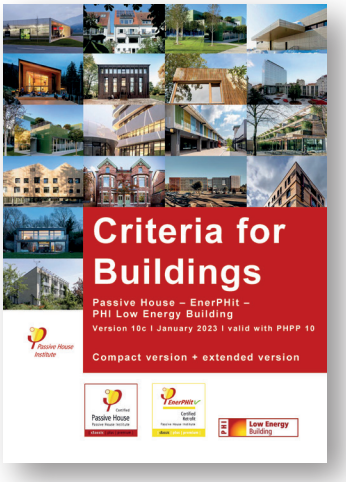


TABLE 1 Core scope of services

Project Stage	Item	Activity	Notes
1 INITIAL REVIEW	**1.1** Certification process	**1.1.1** Confirm certification approach with consultant and Passive House Institute (PHI) if required, including verifying climate data set, number of PHPPs and general boundary conditions	Once the assessment against the Passivhaus criteria has been undertaken, further iterations are not included
		1.1.2 Issue initial list of evidence required for Passivhaus certification	
		1.1.3 Issue file structure for collating design and construction evidence	
		1.1.4 Set up project on PHI portal (https://certification.passivehouse.com/) or alternative methods to store information and ensure the team are clear on how to use it	
	1.2 Initial Review	**1.2.1** Review early-stage design information, and PHPP, DesignPH and supporting calculations to verify against Passivhaus certification criteria	
		1.2.2 Review assumptions made in the absence of design evidence	
	1.3 Feedback	Feedback with initial technical findings including: **1.3.1** Feedback on the likelihood of certification **1.3.2** Feedback problems within the early-stage design information and calculations **1.3.3** Feedback risk areas within the early-stage design information and calculations **1.3.4** Initial Review confidence letter or summary for client - upon request	

continues over...

2 DESIGN REVIEW	**2.1** Design Review	**2.1.1** Compliance review of pre-construction information* with the Passivhaus criteria	Once the assessment against the Passivhaus criteria has been undertaken, further iterations are not included. The assessment will commence when most of the evidence is provided. We recommend completing this stage prior to starting work on site. * *Thermal bridge calculations are produced by the designer (not the Certifier). An assessment of thermal bridge calculations used in the PHPP is at an additional cost <INSERT FEE> per calculation or <INSERT No.> within the 'Additional Consultancy' fee.*
		2.1.2 Review the energy balance calculation in PHPP	
		2.1.3 Review of dynamic modelling for summer comfort for projects where this modelling is required by Building Standards https://pht.guide/DynamicThermalModelling	
	2.2 Feedback	Feedback with detailed technical findings including: **2.2.1** Feedback on the likelihood of certification **2.2.2** Outstanding information **2.2.3** Assumptions **2.2.4** Risk to certification **2.2.5** Design Review confidence letter - upon request	
	2.3 Construction evidence	**2.3.1** Provide project-specific construction evidence register	
3 CONSTRUCTION REVIEW	**3.1** Feedback	**3.1.1** Provide feedback, verbal or written, including highlighting key risks to obtaining certification, in response to requests from design/site team	It is the responsibility of the design/ site team to request feedback. The Certifier is not responsible for contacting the team on a regular basis to make checks and ask for information.
4 AS-BUILT ASSESSMENT	**4.1** Quality assurance	**4.1.1** Review certification evidence provided by Passivhaus Designer/Consultant	
		4.1.2 Provide feedback, highlighting any outstanding obstacles to obtaining certification	
	4.2 Complete PHPP verification	**4.2.1** Review final PHPP. Passivhaus designers should provide a final PHPP to the Passivhaus Certifier, updated to reflect construction information: • final airtightness test result • ventilation commissioning • space heating • domestic hot water system commissioning • changes during construction	
5 CERTIFICATION	**5.1** Completion & processing	**5.1.1** Passivhaus certifiable projects: Liaise with PHI to obtain certificate-ID	
		5.1.2 PHI Low Energy Building standard projects: In some instances the project may not be certifiable to the intended Passivhaus standard but may still meet the PHI Low Energy Building standard. The Passivhaus Certifier to confirm with the client if they wish to proceed with the certification to this alternative standard. Liaise with PHI to obtain certificate-ID	
		5.1.3 Non-certifiable projects: In some instances the project may not be certifiable to any of the Passivhaus standards. In this case the client will be informed, and no further action will be taken by the Certifier.	
	5.2 Certification documents	**5.2.1** Passivhaus plaque - includes XXXX plaque - "Certified Passivhaus"	
		5.2.2 Passivhaus certificate and documentation	

TABLE 2 Optional additional scope of services

Additional services can be provided by Certifiers – see table below.

Project Stage	Item	Activity	Notes
Additional consultancy time will be spilt over all project stages	**6** Additional services	Additional technical support is project specific and can include: **6.1** Support on general process **6.2** Support / guidance to design team **6.3** Support design / construction workshops **6.4** Verify design / specification changes **6.5** Collation of information	
	7 Site visits	**7.1** Site inspection visits, timing to be agreed with site team. Limited to <INSERT No.> visits.	Passivhaus quality control is managed by the Contractor & Passivhaus Designer/Consultant (not the Certifier). Site visits are not required for certification, but strongly recommended for projects of more than 10 homes or for non-residential buildings over 500 m².
	8 Thermal bridge calculation review	**8.1** QA review of 2D thermal bridges	
		8.2 QA review of 3D thermal bridges	
	9 Dynamic hygrothermal moisture calculation review	**9.1** Review	
	10 Air pressure test	**10.1** Carry out air pressure test	This is usually carried out by a third party. Passivhaus Certifiers should only complete this for exceptional cases (e.g. building is in the middle of nowhere)
	11 User guidance	**11.1** Support in preparing User Guidance documentation	

The Passivhaus Trust is an independent, non-profit organisation that provides leadership in the UK for the adoption of the Passivhaus standard and methodology.

Passivhaus is the leading international low energy design standard, backed with over 30 years of building performance evidence. It is a tried & tested solution that enables a meaningful transition to net-zero now. Over 65,000 buildings have been certified to this standard worldwide. The Trust promotes Passivhaus as a robust way of providing high standards of occupant comfort and health AND slashing energy use and carbon emissions from buildings in the UK.

Please find us on Twitter, Linkedin, Instagram, & Facebook @PassivhausTrust. Keep up to date with all things Passivhaus by joining our mailing list.

www.passivhaustrust.org.uk

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