

Becoming a Chartered Energy Manager with the Energy Institute

- ✓ **What becoming a Chartered Energy Manager could mean for you**
- ✓ **The standards you will need to meet**
- ✓ **How to apply**
- ✓ **What you can do now if you aren't yet ready to apply**

Why Chartered status?

Chartered status confirms that an individual has the skills, knowledge, understanding and integrity to practice as a professional in the UK. It gives formal recognition of professional standing, and is recognised and highly valued in many parts of the world.

Many employers in the energy sector look for professional qualifications, or a commitment to achieving professional qualifications, as an indication of quality and professionalism when looking to recruit new staff - and restrict the management of larger projects to those in their organisation who are formally qualified.

If you are looking to develop a successful professional career, professional qualifications are

About the Chartered Energy Manager title

Chartered Energy Managers are professionals who manage energy in an organisation and make sure that it is used efficiently. They provide advice on developing and implementing energy efficient policies. They are not only energy experts, with wide ranging knowledge of complex issues; they also need to be great communicators and change managers, helping others understand the potential of energy efficient practice, and influencing organisation policy.

Chartered Energy Manager is a title unique to the EI – it is not available from any other institution.

Requirements for Chartered Energy Manager

To become a Chartered Energy Manager, you will need to demonstrate that you have appropriate foundation theoretical knowledge and have gained sufficient experience and professional development in the workplace to practice to a competent, nationally recognised standard.

The specific competences you will need to meet as a Chartered Energy Manager are included in this information note as an appendix. Do bear in mind that they may be updated from time to time, so if you have printed this information note for your reference, you should always check our website for updates before you make your application.

As part of your application, you will need to show how you meet the standards for Chartered Energy Manager by completing a **competence grid**. This is a simple document where you relate your experience to the competences and explain how you have met them, including giving detailed and specific examples. You will find this in the application pack which you can download from the EI website.

<https://energyinst.org/membership-and-careers/membership#charteredman>

Professional Membership of the EI

Becoming a Chartered Energy Manager through the Energy Institute requires holding professional membership as either a Member (MEI) or Fellow (FEI).

If you aren't already a professional member of the EI, you must apply for MEI or FEI in advance of making your application for Chartered Engineer. To find out more please go to <https://www.energyinst.org/membership-and-accreditation/membership>.

ESOS Lead Assessor Registration

Previously, there was an option to apply for ESOS Lead Assessor status in conjunction with your Chartered Energy Manager application. However, this is no longer possible. You can now apply for registration as an ESOS Lead Assessor through our Energy Efficiency Experts register – for more information please click on the link below:

<https://www.energyinst.org/industry/energyefficiencyexperts>.

Becoming a Chartered Energy Manager is a suitable pathway to ESOS Lead Assessor registration, as one of the requirements is to hold a relevant chartered title.

Making your application

You can download the application pack from the membership section of the EI website at [Membership | Energy Institute](#). The pack includes the application form, guidance on how to apply and all the templates you will need to complete.

The application form is divided into two sections:

Part A

Part A asks you to provide basic information about you, what you are applying for and why, and your background. This includes your contact details, qualifications and a list of the positions you have held, and where you currently sit within your organisation (indicating your level of responsibility).

You will also need to provide evidence of your continuing professional development and a statement giving an overview of how you have developed your career to date.

At the end of the form, you are asked to sign a declaration that the contents of your application are accurate, you accept the Terms and Conditions of Membership (including the EI's Privacy Policy) and agree to be bound by the EI's Code of Conduct and any conditions of registration set by the Engineering Council.

Part B

Part B is the competence grid, where you will need to give details of how you have met each competence for the title or titles you are applying for. You will need to complete a Part B for each registration you are applying for (so, for example, if you are applying to become Chartered Energy Manager and Chartered Engineer, you will need to complete and submit a Part B competence grid for each title).

You will need to attach evidence for some sections of the form.

Don't forget that you are applying for a qualification which focuses on your professionalism, so it's essential that you follow the application guidelines and format and supply all the information requested. All professional qualifications require the ability to communicate effectively, so make sure your communication skills are demonstrated in the way you put together your application. There is more information on how to complete the application form in the document in the application pack.

When do I need to apply?

You can submit your application anytime but there are four application deadlines each year, which feed into specific meetings of the EI's Membership Panel. You will find information on the next deadline in the membership section of the EI website.



How do I know when I am ready to apply?

There is no set amount of experience you need to have before you can apply – everyone is different, and the type of work and development opportunities you'll have will also vary from person to person. The most important thing is that you can show you meet the standards for the membership or registration you are applying for. If you have a good range of evidence that you can fully meet the competences, and understand your obligations as a professional, you should be ready to apply. Discussing your application with others can often help.

What happens next?

Applications are acknowledged requested within ten working days of receipt.

The Professional Membership Team verifies application completeness before sending it to assessors.

Assessors evaluate the provided evidence against required standards and recommend a course of action thus,

- you should be asked to attend a professional interview; or
- you should be asked to provide further information before the application can proceed, or
- based on the evidence you have submitted, you have not demonstrated that you meet the standards. If this is the case, the feedback from the Panel will indicate the areas of competence which you have not demonstrated in your current application, and in which they recommend you undertake more learning and experience before

Applicants are informed of the Membership Panel's decision within ten working days of their meeting.

The professional interview

Your professional interview will be conducted online. It will normally take between 60 and 75 minutes and we will write to you in advance giving you more information.

The interview will consider your experience and career history and will explore how you have demonstrated the standards of competence and commitment for the titles you are applying for. This includes the Codes of Conduct and guidelines relevant to the registration you are applying for.

As part of your preparation, you should review your application and the relevant competences, and come to the interview ready to talk about the energy sector, your career, the projects you have undertaken, and your responsibilities as an energy professional (legal, ethical and in respect of your conduct) as well as how you meet the requirements for the title you are applying for.

Not yet ready to apply? Things you can do now...

It takes most people a few years to develop their applied knowledge and get enough practical experience in energy management to be able to meet all the competences in full and be ready to apply for Chartered Energy Manager. There is no set period within which you need to get qualified, and it is entirely fine to work at your own pace.

Having said this, there are a few things you can do now to put yourself in the best possible position to move forward when you are ready. Here are some suggestions, in no particular order

1. Join the EI



Become an EI member as soon as you can. You'll need to be a member to apply for a professional grade or registration and it means you will have access to resources, networking and support right from the start. Associate Member of the EI (AMEI) is the EI's membership grade for those who are intending to work towards a professional title or registration – and you will be awarded your first post nominals, which you can use professionally, in your CV and in job applications.

2. Get networking



Attend as many professional events as possible and in particular get involved with your branch and/or Young Professionals Network. Networking will help develop your knowledge and broaden your perspective - and getting involved will give you access to learning and events, new experiences and maybe even new friendships. You could also talk to your nearest Energy Institute branch or YPN about setting up a regular meeting to discuss topics relevant to the Chartered Energy Manager competences, to help build your knowledge.

3. Make sure you know the standards



Make sure you understand the competences for the titles you are applying for and any related codes, requirements or guidelines.

4. Work on your knowledge



Take every opportunity to learn about the sector, wider society and how they impact one another. Read about the latest technologies, talk to colleagues and find out their views, and look for other opportunities to expand your knowledge and widen your perspective.

All this learning is Continuing Professional Development (CPD), which you will need to demonstrate in your application. For more information on how to approach your CPD so it works for you, read the EI's CPD booklet, *The Best You Can Be* in the CPD section of the [EI website](#). There are also CPD templates you can download to record your learning and development, ready for when you apply.

5. Sign up for updates



The EI provides regular news bulletins and updates. Make sure you are signed up so that you get the latest news on the sector and updates which may affect the registrations you already hold or for which you are applying.

6. Get a mentor



It can often be helpful to work with a more experienced professional who is happy to act as a mentor or as a sounding board, especially as you get closer to making your application. Ask them to review what you have written and help you make sure it's comprehensive, and to give you a mock professional interview. They may be willing to act as your sponsor. If there is no one suitable in your company, your branch may be able to help. [Sign up to EI Connect](#).

7. Start collecting your evidence



Review the competences and start gathering evidence as you go along so that when you come to complete the competence grid as part of your application you already have examples and notes to refer to. The EI offers a free online tool, MyCareerPath, to help you to do this and keep your evidence in order. You will find a link to MyCareerPath in your online account on the EI website. After you log in, look at the tabs on the left-hand side of the screen.

8. Sign up to one of our webinars

We run regular webinars to explain the process to get qualified and help you get started. Visit the EI website to sign up.



9. Get in touch!

We are here to help! If there is anything you aren't sure about, get in touch with us on +44(0)20 7467 7100 or professionals@energyinst.org



Some key documents

There are a number of documents you will need to refer to in the course of putting together your application and which you will be expected to be aware of and adhere to if your application is successful. You may also be asked about them specifically in your interview, including how they affect your practice and conduct as a professional.

These documents are reproduced in the appendices to this guidance note. Please be aware that they will be updated from time to time - check for updates before you make your application.

- **The EI Code of Professional Conduct.** The EI Code of Conduct describes the standards of conduct you must abide by as a member of the Energy Institute. A breach of the code could lead to disciplinary procedures being brought against you.
- **Chartered Energy Manager Competences.** This sets out the competence and commitment required for registration as a Chartered Energy Manager.

Other documents

- **The best you can be.** This document explains the EI's CPD requirements and gives simple guidance on how to approach your CPD to get the most from your professional development. It is downloadable from the EI website at www.energyinst.org.

Appendices

- Appendix A The Energy Institute Code of Professional Conduct
- Appendix B Competences of a Chartered Energy Manager

The EI Code of Professional Conduct

All members of the Energy Institute sign the Code of Professional Conduct when they join the EI. In doing so they show that they recognise the importance of their professional activities for the quality of life and the benefit of society as a whole. They accept a personal obligation to act ethically and with integrity in the public interest and to maintain and improve their competence.

The following Code, which is written in general terms, is designed to cover these broad principles. The Code is set by the Council of the Energy Institute in accordance with the Bylaws. While it is not exhaustive it indicates the manner in which all members are required to conduct themselves in most situations. In other situations, members are required to order their conduct in accordance with the principle that in any conflict between the members' professional duties and their duty to other parties and interests, the members' professional duties will prevail.

Some Members will hold professional registrations awarded by the EI under license from another body. Where this is the case, in addition to adhering to the EI Code, they must ensure that they are aware of and uphold the standards and ethical codes relevant to the professional registrations or titles they hold.

1. Health, safety, security and the environment

1.1 Members will at all times take care to ensure that their work and the products of their work constitute no avoidable danger of death or injury or ill-health to any person.

1.2 Members will have due regard for the need to protect the environment and to provide energy services in a way that is safe and sustainable. They will make a systematic assessment of environmental, health and safety risks related to their work, their individual legal liability and the requirements of the jurisdiction in which they work and seek to manage and communicate this effectively.

1.3 Members will act with skill, care and diligence and will ensure that their work complies with relevant quality standards and legislation as appropriate.

1.4 Members will adopt a security minded approach to their work, taking steps to assess, manage and communicate vulnerabilities in assets, system and operations and to prevent avoidable risks to both physical and cyber security.

1.5 Members will hold professional indemnity insurance where appropriate to the area and context of their practice and will inform clients whether professional indemnity insurance is held if specifically asked.

2. Maintaining and developing competence

2.1 Members will take all reasonable steps to maintain and develop their professional competence, keeping records to demonstrate their ongoing development as appropriate. Where possible they will encourage and support the development of their staff and others, including in the achievement of appropriate professional membership and qualifications with the EI or appropriate professional body.

3. Integrity and responsibilities

3.1 Members will discharge their professional responsibilities with integrity and will accept personal responsibility for all work done by them, or under their supervision or direction, and will take all reasonable steps to ensure that persons working under their authority are competent to carry out the tasks assigned to them.

3.2 Members will ensure that they and the people working under their authority undertake technical tasks for others only if qualified by training or expertise and after full disclosure of relevant limitations.

3.3 Members will treat people fairly, with respect and without bias. They will not discriminate based on disability, age, gender, gender reassignment, sexual orientation, ethnicity, religion or belief, marriage or civil partnership, pregnancy and maternity, or discrimination by association, and should seek to promote an inclusive working environment.

4. Gratuities, commissions and conflicts of interest

4.1 Members will reject bribery and all forms of corrupt behaviour and make positive efforts to ensure others do likewise. They will not accept remuneration in connection with professional services rendered to their employer other than from their employer or with their employer's consent; nor will they receive directly or indirectly any royalty, gratuity or commission on any article or process used in or for the purpose of the work in respect of which they are employed unless or until such royalty, gratuity or commission has been authorised by their employer.

4.2 Members will not, without disclosing the fact in writing to their clients and to their employer, wittingly be a director or member of, or a shareholder in, or act as agent for, any contracting or manufacturing company or firm or business with which they may have occasion to deal on behalf of their clients or employer, or have any financial interest in or receive any benefit from or on behalf of such a business.

4.3 Members will not make false or exaggerated claims, or advertise any such claims expressly, in letters or articles for publication; nor will they permit others to use their name to endorse any such claims or in any form of advertising in relation to any product or process.

4.4 Members will not improperly seek work as an independent adviser, or consultant, either directly or through an agent; nor will they improperly pay any person for the introduction of such work.

4.5 Members will not seek to represent the Energy Institute, its members or its staff, unless expressly requested by the Chief Executive. Neither shall they use the EI or the designatory letters to which they are entitled to imply that they are acting on behalf of, or with the authority of, the Institute, except when conducting Institute business in the capacity of an EI Code of Professional Conduct January 2018 Page 3 honorary officer. If a member is invited to represent the EI on an external body, application should be made to the Chief Executive for details of EI's policy.

4.6 Members shall not use designatory letters to which they are not entitled.

5. Professional reputation

5.1 Members called upon to give an opinion in their professional capacity will, to the best of their ability, give an opinion that is objective and reliable and that includes clear statements of the impact and consequences of decisions and projects.

5.2 Subject to Paragraph 5.1, members will not set out to challenge the professional reputation of others unless it is in the public interest or necessary to protect their own professional reputation.

6. Improper conduct

6.1 Members will at all times uphold the good name and further the interests of the profession. They must notify the EI on receiving a civil court order or criminal conviction (excluding road traffic offences), becoming bankrupt or disqualification under the Company Directors' Disqualification Act, 1986. It will be for Council to consider whether such conviction, bankruptcy or disqualification is damaging to the EI or otherwise renders the member concerned unfit to be a member of the EI.

6.2 Members will act to raise a concern about a danger, risk, malpractice or wrongdoing which affects others ('blow the whistle') and support a colleague or any other person to whom they have a duty of care who in good faith raises any such concern.

7. Confidentiality

7.1 Members will not divulge any information acquired by them which is not within the public knowledge, or any information given to them in confidence without the express authority of the appropriate party, other than in evidence before a parliamentary committee, by order of a Court, or as required by law.

8. Violation by others

8.1 Members will report in writing to the Head of Professional Affairs any violation of these rules by another member of the EI.

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Appendix B

Chartered Energy Manager Competences

A. Apply detailed knowledge and experience of energy management to provide advice on different aspects of energy efficiency

Competence		This could include an ability to:
A1	Provide advice on the development and implementation of energy policies	<ul style="list-style-type: none"> Provide advice on the development of policies for the use of energy Recommend strategies to implement energy policies
A2	Monitor and evaluate energy use efficiently	<ul style="list-style-type: none"> Establish systems and processes to monitor and evaluate energy usage Obtain, analyse and record information on energy efficiency performance Evaluate the organisation's energy efficiency performance
A3	Provide advice and support for the development of energy efficient practices	<ul style="list-style-type: none"> Support the development of a culture of energy awareness Provide advice and support for energy efficient practices
A4	Provide advice and support for the development and implementation of systems to measure energy usage	<ul style="list-style-type: none"> Provide support for the development of systems to measure energy usage Provide support for the collection, analysis and recording of information on energy usage Provide advice on trends and development in energy usage
A5	Provide advice and support for improving energy efficiency	<ul style="list-style-type: none"> Encourage involvement in energy efficiency activities Provide advice on the competences needed to use energy efficiently Provide advice on the training needed to use energy efficiently

B Promote energy efficiency and knowledge of market supply

Competence		This could include an ability to:
B1	Promote, identify and implement improvements to energy efficiency	<ul style="list-style-type: none"> Promote energy efficiency throughout the organisation Promote the organisation's achievements in energy efficiency Identify opportunities to improve energy efficiency Recommend improvements to energy efficiency to senior management

B2	Determine conditions in the market supplies and carry out suitable risk analysis	<ul style="list-style-type: none"> Establish your organisation's position in the marketplace Identify market changes likely to affect supplies Determine the competitiveness of supplies from the market Identify beneficial developments relating to supplies and sources
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C Manage activities and resources

Competence		This could include an ability to:
C1	Manage activities to meet requirements	<ul style="list-style-type: none"> Implement plans to meet customer requirements Maintain a healthy, safe and productive work environment Ensure products and services meet quality requirements
C2	Determine the effective use of resources	<ul style="list-style-type: none"> Make proposals for expenditure on programs of work Agree budgets for programs of work Control expenditure and activities against budgets

D Develop working relations and teams

Competence		This could include an ability to:
D1	Develop productive working relationships	<ul style="list-style-type: none"> Develop the trust and support of colleagues and team members Develop the trust and support of your manager Minimise interpersonal conflict
D2	Develop teams and individuals to enhance performance	<ul style="list-style-type: none"> Identify the development needs of teams and individuals Plan the development of teams and individuals Develop teams to improve performance Support individual learning and development Assess the development of teams and individuals Improve the development of teams and individuals
D3	Facilitate meetings	<ul style="list-style-type: none"> Lead meetings Make contributions to meetings

E Compliance, safety, sustainability and professional development

Competence		This could include an ability to:
E1	Develop your own resources	<ul style="list-style-type: none"> • Develop yourself to improve your own performance • Manage your own time and resources to meet your objectives
E2	Manage continuous quality improvement	<ul style="list-style-type: none"> • Develop and implement systems to monitor and evaluate organisational performance • Promote continuous quality improvement for products, services and processes
E3	Carry out and record continuing professional development necessary to maintain and enhance competence in energy efficiency and management	<ul style="list-style-type: none"> • Record evidence of your ongoing CPD • Assess your career path to show ongoing progression • Demonstrate your growing expertise and professionalism • Act as a mentor for others seeking professional recognition
E4	Comply with relevant legislation and standards of good practice	<ul style="list-style-type: none"> • Carry out work in compliance with current legislation in particular the Climate Change Act, Energy Act, Energy Performance of Buildings Directive etc. where appropriate • Adopt and use standards of good practice including international standards such as ISO 50001 • Manage safe systems of work including responsibility for health and safety requirements where applicable
E5	Undertake activities in a way that contributes to sustainable development	<ul style="list-style-type: none"> • Take account of environmental, social and economic issues in making decisions • Ensure relevant assessments have been made of the impact of any actions undertaken

