**Certified Energy Auditor   
Applicant Self-Assessment Form**

1. Purpose

This form is intended to facilitate applicants interested in becoming a Certified Energy Auditor, assess their existing skills, knowledge and experience for suitability and identify areas were skills, knowledge or experience will need to be built.

This form is not part of the formal application documentation, it is intended to help candidates critically assess their likely success and prepare suitable documentation for formal application. This form does not need to be submitted with your application.

1. Completion Guide
   1. Criteria Categories

Your application will be assessed against 22 criteria, such as technical skills, analytical skills and practical skills.

The criteria are grouped into three categories as follows:

Energy Use Analysis

Energy Savings Calculations

Financial Analysis

* 1. Scoring

To be successful, you will need to achieve a minimum of 75% overall with a minimum of 70% in each category. You do not need to achieve a minimum of 70% against each criterion but you will need to achieve that level (70%) for each of the three categories.

This self-assessment worksheet is very similar to the assessment proforma your assessor will use. The categories and weightings are the same. The main difference is that your assessor is reliant on the documented evidence you provide. If your self-assessment and evidence scores are materially different, you may like to think about providing different evidence. If your self-assessment score is low, maybe think about deferring your application to build stronger experience before applying.

* 1. Self-assessment Worksheet Columns Explained

The self-assessment worksheet lists the 22 criteria against which your experience will be assessed and blank cells to allow you to assess your experience critically against each criterion.

**Weightings –** The weighted scoring listed, assigns varying importance to criteria for evaluation.

**Self-rating -** Evaluate your skills, knowledge and experience level for each criterion, within the rating scale of zero (0) to ten (10), where 0 is non-existent and 10 is expert level.

**Evidenced by** - Record the tangible evidence you would submit to support an application against each criterion.

**Evidence Strength -** Make a critical assessment of how strong your supporting evidence would be to an independent assessor using a scale of zero (0) to ten (10), where 0 is non-existent and 10 is extremely strong.

* 1. Assessor

The assessor will be looking for strong evidence to support your application. They are obliged to assess suitability based on the submitted evidence and a subsequent interview. Please note, the assessor will not see your self-assessment form, it is intended to help you refine your application and put forward a successful application.

In making applications, it is incumbent on the applicant to demonstrate competence, not on CEP or CEP assessors to prove a lack of competence. Applications will have a stronger chance of success and be processed more quickly if they are detailed, thorough and supported by robust documentation. Gaps in supporting documentation will cause delays in processing and could lead to an unsuccessful application.

1. Self-assessment Worksheet

| **Item** | **A**  **Demonstrated Capability**  **Criterion** | **B**  **Weighting** | **C**  **Self-rating** (0-10) | **D**  **Weighted rating**  **BxC** | **E**  **Evidenced by** | **F**  **Evidence Strength** (1-10) | **G**  **Weighted strength**  **BxF** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **1** | **Energy Use Analysis** | | | | | | |
| 1.1 | **Technical skills** in assessing and improving energy systems. | 3 |  |  |  |  |  |
| 1.2 | **Ability** to analyse energy consumption data specific to various business sectors and industrial processes | 3 |  |  |  |  |  |
| 1.3 | **Competence** in using analytical tools to dissect energy usage patterns and identify anomalies | 3 |  |  |  |  |  |
| 1.4 | **Experience** with energy systems in relevant business sectors | 3 |  |  |  |  |  |
| 1.5 | **Skills** in adapting energy efficiency measures to specific industrial environments | 3 |  |  |  |  |  |
| 1.6 | **Knowledge** of benchmarking processes and how to compare facility performance against industry standards. | 3 |  |  |  |  |  |
| 1.7 | **Ability** to identify and provide pragmatic solutions that improve the efficiency and effectiveness of energy use at subject site(s). | 3 |  |  |  |  |  |
| 1.8 | **Judgement** in weighing the merits of potentially conflicting or mutually exclusive options. | 2 |  |  |  |  |  |
| 1.9 | **Demonstrate** knowledge and ability to apply basic Measurement and Verification techniques | 1 |  |  |  |  |  |
| 1.10 | **Ability** to set justifiable and effective boundaries around the energy efficiency measures to provide clarity regarding the energy audit and the measurement and justification of its success. | 1 |  |  |  |  |  |
| 1.11 | **Awareness** of sustainable energy practices, including renewable energy options and their applicability | 1 |  |  |  |  |  |
| 1.12 | **Knowledge** of common techniques and measures for conserving energy across different systems | 3 |  |  |  |  |  |
| 1.13 | **Awareness** of relevant environmental regulations and incentives that promote energy efficiency | 1 |  |  |  |  |  |
| 1.14 | **Skills** in formulating energy strategies that consider long-term sustainability and efficiency goals. | 1 |  |  |  |  |  |
|  | **Category 1 Total** |  |  | Σ |  |  | Σ |
|  | **Category 1 Available** |  |  | 310 |  |  | 310 |
| **2** | **Energy Savings Calculations** | | | | | | |
| 2.1 | **Skills** in assessing the reasonableness of assumptions and discussing the effects of varying them. | 3 |  |  |  |  |  |
| 2.2 | **Skills** in selecting and applying methodologies that are reasonable and suitable for energy calculations. | 3 |  |  |  |  |  |
| 2.3 | **Skills** in achieving savings calculations that meet the precision requirements of the specified audit level (Minimum Level 2 with results to ±20%). | 3 |  |  |  |  |  |
|  | **Category 2 Total** |  |  | Σ |  |  | Σ |
|  | **Category 2 Available** |  |  | 90 |  |  | 90 |
| **3** | **Financial Analysis** | | | | | | |
| 3.1 | **Proficiency** in describing all sources of costs associated with energy efficiency recommendations. | 3 |  |  |  |  |  |
| 3.2 | **Skills** in correctly calculating payback periods for energy investments. | 3 |  |  |  |  |  |
| 3.3 | **Competence** in utilising more sophisticated financial analysis methods beyond simple payback, such as net present value (NPV), internal rate of return (IRR) and lifecycle costing. | 3 |  |  |  |  |  |
| 3.4 | **Proficiency** in ensuring financial assumptions and methodologies yield savings that meet the accuracy requirements of the audit level. | 3 |  |  |  |  |  |
| 3.5 | **Ability** to assess and report whether the financial analysis's accuracy reflects the quality and accuracy of the information available. | 3 |  |  |  |  |  |
|  | **Category 3 Total** |  |  | Σ |  |  | Σ |
|  | **Category 3 Available** |  |  | 150 |  |  | 150 |

You will require an overall average of 75% to be successful with a minimum of 70% required for each category.