



Membership Agreement

November 2025

This Membership Agreement outlines the terms and conditions under which individuals and entities ("Members") are accredited and maintain membership with the Kaizen Certification Ltd's Accreditation Scheme.

1: Code of Conduct Adherence

1.1 Understanding and Commitment: Members must thoroughly understand and commit to the Kaizen Certification Ltd's Code of Conduct. This includes adherence to ethical guidelines, professional standards, and respectful interaction with clients, colleagues, and the public.

1.2 Regular Review and Compliance: Members are expected to regularly review the Code of Conduct and ensure their activities comply with its provisions. Changes or updates to the Code will be communicated promptly, and members are responsible for incorporating these changes into their practices.

1.3 Breach of Code: Any breach of the Code of Conduct may result in disciplinary action, including but not limited to suspension or termination of membership. Members are encouraged to report any observed breaches or unethical behaviour in accordance with the established reporting procedures.

2: Professional Standards and Competence

2.1 Maintenance of Professional Standards: Members must consistently maintain high professional standards in their work. This includes the quality of service, accuracy of work, and adherence to industry best practices.

2.2 Evidence of Competence: Members are required to demonstrate ongoing competence in their field. This may include the submission of work samples, client feedback, or results of competency assessments as required by the Scheme.

2.3 Updating Skills and Knowledge: In response to industry changes, technological advancements, and regulatory updates, members are expected to regularly update their skills and knowledge to remain effective and compliant in their professional roles.

2.4 Compliance with Emerging Regulations

Commit to an annual review of professional standards and competence requirements to ensure alignment with emerging industry regulations and best practices. This will include updating policies to reflect changes in law, technology, and market conditions that impact professional activities.

3: Insurance and Liability

3.1 Requirement for Insurance: Members must hold and maintain valid professional indemnity insurance and public liability insurance. The minimum coverage amount should align with the Scheme's requirements or as dictated by relevant regulations.

3.2 Proof of Insurance: Members are required to provide proof of insurance upon request. This may include certificates of insurance, policy documents, or other evidence as deemed necessary by the Scheme.

3.3 Notification of Changes: Members must promptly notify the Scheme of any changes to their insurance status, including policy renewals, modifications, or cancellations. Failure to maintain required insurance coverage may result in suspension or termination of membership.

4: Continuous Professional Development (CPD)

4.1 CPD Requirements: Members are required to complete a minimum number of hours of continuous professional development activities annually, as specified by the Scheme. These activities should be relevant to their field of expertise and aimed at enhancing their professional skills and knowledge.

4.2 Documentation and Reporting: Members must document and report their CPD activities to the Scheme, providing details such as the nature of the activity, duration, and how it contributes to their professional development.

4.3 Non-Compliance Consequences: Failure to meet the CPD requirements may result in disciplinary actions, including suspension or revocation of membership. The Scheme may provide guidance or support to members struggling to meet CPD requirements.

5: Financial Stability

5.1 Financial Responsibility: Members are expected to maintain a stable financial status to ensure they can fulfil their professional obligations effectively. This includes managing debts, liabilities, and other financial commitments responsibly.

5.2 Disclosure of Financial Issues: Members must disclose any significant financial issues, such as bankruptcy or insolvency, to the Scheme as these may impact their ability to operate as a reliable and credible professional.

5.3 Support and Advice: The Scheme may offer advice or resources to members facing financial difficulties, helping them to maintain their financial stability and meet the required standards.

5.4 Sustainability and Environmental Responsibility: Members are encouraged to adopt sustainable practices in their professional activities. This includes minimising environmental impact, promoting energy efficiency, and using sustainable resources where possible.

6: Data Protection Compliance

6.1 Adherence to Data Protection Laws: Members must comply with all relevant data protection legislation, including but not limited to the General Data Protection Regulation (GDPR) and the Data Protection Act. This involves ensuring the confidentiality, integrity, and availability of personal data they handle.

6.2 Data Handling Procedures: Members must establish and follow appropriate data handling procedures, including obtaining consent for data collection, ensuring data accuracy, and implementing measures for data security.

6.3 Reporting Data Breaches: In the event of a data breach, members are required to follow the Scheme's reporting protocol and take immediate action to mitigate any potential harm. This includes notifying affected parties and relevant authorities as per legal requirements.

7: Complaints and Disciplinary Procedures

7.1 Adherence to Procedures: Members must adhere to the Scheme's established complaints and disciplinary procedures. This includes participating fully and cooperatively in any investigations or audits conducted by the Scheme.

7.2 Handling of Complaints: Members are expected to respond promptly and professionally to complaints made against them, following the Scheme's guidelines for resolution and redress.

7.3 Disciplinary Actions: In cases of non-compliance or misconduct, members may face disciplinary actions, including formal warnings, suspension of membership, or termination. The severity of the action will depend on the nature and gravity of the breach.

8: Reporting Requirements

8.1 Regular Reporting: Members are required to submit regular reports as mandated by the Scheme, which may include activity logs, compliance certifications, and updates on ongoing projects or assignments.

8.2 Accuracy and Timeliness: All reports must be accurate, complete, and submitted within the stipulated deadlines. Failure to submit timely reports, or submission of inaccurate or incomplete reports, may result in disciplinary action.

8.3 Confidentiality in Reporting: Members must maintain confidentiality and data protection standards when preparing and submitting reports, ensuring that sensitive information is securely handled.

8a: Audit & Evidence Obligations

8a.1 Members must supply all requested audit evidence within 15 working days.

8a.2 Members failing to do so will be suspended automatically until evidence is received.

8a.3 Members must re-lodge any defective certificate within 10 working days of a Kaizen request.

9: Term and Renewal

9.1 Membership Duration: Membership is granted for a specific term, typically one year, after which it must be renewed.

9.2 Renewal Process: Prior to the expiration of the current term, members will receive a notification to renew their membership. The renewal process may include a review of the member's performance, adherence to standards, and completion of CPD requirements.

9.3 Non-Renewal Consequences: Failure to renew membership within the designated timeframe may result in the suspension of accreditation rights and benefits.

10: Termination of Membership

10.1 Voluntary Termination: Members may voluntarily terminate their membership by providing written notice to the Scheme, adhering to the notice period specified in the agreement.

10.2 Involuntary Termination: The Scheme reserves the right to terminate a member's accreditation in cases of severe breaches of the agreement, misconduct, or failure to meet professional standards.

10.3 Post-Termination Obligations: Upon termination, members must cease to represent themselves as accredited members of the Scheme and return any materials or documents provided by the Scheme.

11: Dispute Resolution

11.1 Resolution Process: In the event of a dispute arising from this Agreement, members are encouraged to seek resolution through the Scheme's internal dispute resolution process before resorting to external legal channels.

11.2 Mediation and Arbitration: If internal resolution is not possible, the dispute may be subjected to mediation or arbitration, as agreed upon by both parties.

11.3 Binding Decisions: Decisions made through the dispute resolution process are binding on both the member and the Scheme, and both parties agree to abide by such decisions.

12: Scotland. Additional obligations

- Members producing Scottish EPCs must use software approved for use in Scotland and apply the relevant methodology.

- Members consent to the AO sharing membership status with the Scottish Government and other AOs when membership is suspended or withdrawn, and to respond to formal information requests.
- Members accept that their lodged output will be sampled to a minimum 2%, with checks at least every six months while active, and that new members are checked within their first month.
- Members will keep assessment records for not less than 5 years for Scottish EPCs.

Acknowledgement and Acceptance

By signing this Agreement, the Member acknowledges understanding and acceptance of these terms and conditions.

A copy of this Agreement will be retained by both the Member and Kaizen Certification Ltd for record-keeping and reference.