



# Mentoring Policy

## NatHERS for existing homes

Version 1.0

OFFICIAL  
NatHERS for existing homes Mentoring Policy

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**Acknowledgement of Country**

We acknowledge the Traditional Owners of Country throughout Australia and recognise their continuing connection to land, waters and culture. We pay our respects to their Elders past and present.

# At a glance: Mentoring

Becoming a Mentor
<p>Mentors must demonstrate that they:</p> <ul style="list-style-type: none"><li>i) Have a high degree of proficiency in NatHERS for existing homes software</li><li>ii) Can provide tailored advice to assessors.</li></ul> <p>Assessor accreditation service providers appoint assessors as Mentors and add them to their list of Mentors.</p> <p>Mentor conflict of interest details are registered on appointment and are updated with the assessor accreditation service provider annually.</p>
Selecting a Mentor
<p><b>Assessor receives Performance Improvement Action</b></p> <p>The assessor accreditation service provider will provide the assessor with a list of approved Mentors and outline the terms on which a Mentor is engaged (i.e. paid, free, through the assessor accreditation service provider or directly). The assessor then engages their chosen mentor.</p>
<p><b>Assessor decides they wish to voluntarily undergo mentoring</b></p> <p>The assessor voluntarily engages a Mentor that can address desired areas of improvement.</p>
Mentoring
<p>The Mentor reviews the Performance Improvement Action Notice, the assessor's Audit Report, and/or other areas of concern to understand the issues the assessor should address.</p> <p>The Mentor provides advice and confirms the correct inputs and use of NatHERS for existing homes software, what needs to be amended to address any issues, and how to address and prevent the issue in the future.</p> <p>The Mentor keeps a log of activities and time spent completing.</p>
Completion
<p>On completion of Mentoring, the Mentor's log is submitted to the assessor accreditation service provider and/or shared with the assessor.</p> <p>The assessor accreditation service provider reviews the log and confirms completion of mentoring as required as part of Performance Improvement Action given.</p>

**Note: Mentors will be progressively appointed throughout the staged release of NatHERS for existing homes. During this period, there may be limited availability of mentors. Please contact your assessor accreditation service provider if you require or wish to undergo mentoring but are unable to find a mentor.**

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# 1 Purpose

The Nationwide House Energy Rating Scheme (NatHERS) provides a standardised approach to rating the energy performance of homes throughout Australia.

The success of NatHERS is contingent upon accurate, trusted, and reliable ratings. The NatHERS Administrator achieves this in partnership with delivery partners who support accreditation, monitoring and compliance activities. Where there is evidence of non-compliance, the NatHERS delivery partners have responsibilities to take corrective action.

This policy sets out the requirements for, and role of, mentors in improving the performance of assessors through mentoring. This policy details:

- the responsibilities of mentors
- the mentoring process
- how mentors are appointed
- scenarios where mentoring is provided.

# 2 Principles

For assessors who are trying to improve their performance, it is essential that guidance is impartial and focused on continuous improvement and quality of delivery. Mentors, as a key way of helping assessors improve their performance, need to uphold these principles.

Our approach to mentoring:

## Is impartial:

Mentoring must be provided reasonably and objectively, and without regard for cultural identity, national origin, religion, linguistic background, sex, gender expression, sexual orientation, physical or intellectual ability, socioeconomic status, or other protected personal attributes.

## Is focused on continuous improvement:

Guidance provided by mentors must be fully informed and based on the best available information and evidence at the time.

When mentoring as part of performance improvement action, delivery is focused on the continuous improvement of the assessor, more than just completion of performance improvement action by the assessor.

## Delivers quality:

Mentors are expected to be exemplary assessors with a high degree of competency, now and into the future.

Mentoring focuses on delivering quality and tailored advice specific to an assessor's needs - aiming to improve the assessor's performance to ensure they deliver accurate and reliable assessments.

During the staged release of NatHERS for existing homes, there may be limited availability of mentors. Assessors should contact their assessor accreditation service provider for more information.

## 3 Mentor requirements

### 3.1 Mentor responsibilities

Mentors are individuals with a high degree of proficiency in the use of NatHERS for existing homes software tools, and the ability to provide tailored technical advice and assistance to an assessor to help them deliver consistent, accurate and reliable assessments.

Mentors provide mentoring to an assessor for a specified number of assessments, as part of performance improvement action or through voluntary engagement. They report the assessor's completion of mentoring to the assessor accreditation service provider.

Some areas of knowledge which a mentor will need to mentor assessors in will include, but are not limited to:

- understanding and correctly applying the **NatHERS for Existing Homes Technical Note**
- correctly collecting data and using NatHERS for existing homes software tools
- correctly applying training and education outcomes to produce accurate assessments
- helping assessors understand their obligations under the **NatHERS for Existing Homes Assessor Code of Practice**.

### 3.2 Mentoring process

When providing mentoring for an assessor for an assessment, a mentor must:

1. confirm if there are any potential, actual or perceived conflict of interests relating to their responsibilities as a Mentor. If a conflict of interest exists, they are required to notify to the assessor accreditation service provider before continuing.
2. review the assessor's performance improvement action notice (if the mentoring is part of performance improvement action) and the audit report (if the performance improvement action results from an audit) to understand what issues the assessor needs to address.
3. provide advice to the assessor for the assessment, covering:
  - a. the correct inputs and use of NatHERS for existing homes software
  - b. what needs to be amended to address any identified issues
  - c. how to address and prevent the issues in future.
4. confirm the inputs for the assessment are correct.

Mentoring can either be provided in-person (with the mentor accompanying the assessor on-site) or remotely (by examining the assessment inputs against the assessor's collected evidence). If the mentoring is part of performance improvement action, the assessor accreditation service provider may specify if the mentoring must be in-person.

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The mentor must keep a log of time and activities and email the log to the assessor accreditation service provider and assessor upon completion of all mentoring. The assessor accreditation service provider will then confirm that the mentoring is complete by reviewing the log of activities from the mentor.

### 3.3 Being appointed a mentor

Mentors are appointed by assessor accreditation service providers. They must meet and maintain a high standard of proficiency.

An assessor accreditation service provider can appoint an individual to be a mentor if they are satisfied they meet certain requirements. To be appointed a mentor, an individual is required to demonstrate that they:

- possess and can maintain a high level of knowledge and proficiency in NatHERS for existing homes software and assessments. This could be demonstrated by:
  - being an active assessor with a high demonstrated standard of results - completing a minimum number of 20 assessments per year with results of 90% and above in any audits, and no performance improvement or suspension action in the last three years; or
  - otherwise being a suitably qualified person with proficiency, skills or qualifications agreed as acceptable by the NatHERS Administrator
- have skills or capability to provide tailored advice and assistance to an assessor to help them deliver accurate and reliable results
- have appropriate insurance to cover mentoring work.

Other desirable traits for mentors could include, but are not limited to:

- being a NatHERS for existing homes accredited assessor
- being a NatHERS for new homes accredited assessor or mentor
- having previous experience in mentoring or training
- having relevant experience within the industry
- having other relevant qualifications.

The requirements for being appointed a mentor must be maintained for the duration of the assessor's appointment as a mentor.

### 3.4 Conflict of interest considerations for mentors

To ensure they provide appropriate and impartial mentoring, mentors are required to declare and appropriately manage conflicts of interest (potential, actual, or which could reasonably be perceived to exist).

During the staged release of NatHERS for existing homes, there may be limited availability of mentors. Assessors should contact their assessor accreditation service provider for more information.



A mentor must submit this declaration on appointment as a mentor, annually thereafter, and as necessary if any previously undeclared conflict of interest arises.

In the declaration, mentors must include any personal or business relationship with any assessor accredited by the assessor accreditation service provider. They must also identify any management strategies they will implement to successfully mitigate their identified conflicts.

If conflicts of interest are effectively managed, mentors may be able to hold multiple roles within NatHERS, such as also acting as an assessor and as an auditor.

To effectively manage conflict of interests, mentors must not:

- mentor any assessors they have conducted an audit on within the last 24 months, unless the assessor accreditation service provider provides written approval
- mentor any assessors with which they, or someone they have a close personal relationship with (defined as a regular and ongoing association that is romantic, familial or financial in nature), have a personal or business relationship
- provide mentoring for any assessments of properties in which they, or someone they have a close personal relationship with, holds a financial interest.

Conflict of interest declarations made by a mentor will be retained by the assessor accreditation service provider for a minimum of 7 years.

If a conflict of interest becomes apparent during engagement or provision of mentoring, this must immediately be disclosed to the assessor accreditation service provider before the mentoring continues, and management strategies put in place as agreed with the assessor accreditation service provider. If the conflict cannot be reasonably managed, the assessor accreditation service provider may require the mentoring to stop.

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## 4 Receiving mentoring

Mentoring may be necessary in three main scenarios during an assessor's NatHERS accreditation. These are when an assessor:

- has been assigned mentoring as a performance improvement action (such as following an unsatisfactory desktop audit)
- voluntarily wishes to improve their performance through mentoring
- is under suspension, but has been given approval to submit assessments under the supervision of a mentor.

An assessor is eligible for CPD for mentoring based on 1 CPD point per hour of mentoring (and in accordance with section A6.2 of the **NatHERS for Existing Homes Assessor Code of Practice**).

**Note: Mentors will be progressively appointed throughout the staged release of NatHERS for existing homes. During this period, there may be limited availability of mentors. Please contact your assessor accreditation service provider if you require or wish to undergo mentoring but are unable to find a mentor.**

### 4.1 Mentoring as performance improvement action

Assessors may be required to receive mentoring as part of performance improvement action.

The assessor accreditation service provider will determine a number of assessments (typically 1-5) for which the assessor is required to receive mentoring. This number will be in proportion to the assessor's non-compliance.

The assessor accreditation service provider will then provide the assessor with a list of one or more appointed mentors to choose from. The assessor must engage the services of one of the mentors provided by the assessor accreditation service provider, to provide feedback and advice on how to correctly complete assessments and address the performance improvement action.

Once the required mentoring is complete, the Mentor will provide the assessor accreditation provider a log of the mentoring, which the accreditation provider will use to determine that the mentoring has been completed to satisfaction.

**Note: A mentor who is also an auditor, and who has audited the assessor in the previous 24 months, may not mentor that assessor unless the assessor accreditation service provider has provided written approval. The assessor accreditation service provider should remove these individuals from the list of mentors provided to the assessor.**

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The assessor accreditation service provider is responsible for determining payment requirements for required mentoring. These may include, for example:

- the assessor accreditation service provider pays the mentor, with no cost to the assessor
- the mentor charges the assessor at a standard rate agreed with the assessor accreditation service provider
- fees are agreed directly between the mentor and assessor, on a case-by-case basis.

Refer to the **NatHERS for Existing Homes Performance Management Policy** and **NatHERS for Existing Homes Assessor Audit Policy** for more information on performance improvement action.

**Figure 2: Scenario where performance improvement actions were given because of an audit**

To ensure the continued trust and confidence in the quality of NatHERS assessments, assessor accreditation service providers periodically perform audits on assessor's assessments. This is to check that assessors are maintaining a high standard so that assessments do not mislead consumers and stakeholders.

John has been audited and received a score of 39%. The assessor accreditation service provider has suspended John's accreditation, and he is required to complete additional training and 5 sessions of mentoring, which can be either remote or in-person. He has been allowed to complete assessments while being mentored during his suspension.

As part of his mentoring, John is required to engage with his mentor to:

- amend and resubmit the audited assessment, and
- have any further assessments approved by the mentor during John's period of suspension.

From the list of mentors provided by his assessor accreditation service provider, John has engaged mentor Tina to provide him with 5 sessions of remote mentoring. John provides Tina with his performance improvement action notice, his audit report and any other relevant assessment documentation requested by Tina.

Tina mentors John for the errors noted in John's audit report, including the correct inputs and use of NatHERS software, what needs to be amended in his assessments, and ways to prevent the issues from occurring in the future. This is done on his audited assessment, and four new assessments John is undertaking during his suspension, to complete John's 5 sessions of mentoring.

For each assessment, Tina confirms that the assessment inputs are correct. Tina logs all mentoring done and provides a copy of these logs to the assessor accreditation service provider and John, to confirm John's completion of the mentoring. On confirmation of satisfactory completion of John's performance improvement action, including mentoring and any other actions, the assessor accreditation service provider lifts John's suspension.

## 4.2 Voluntary mentoring

Outside of performance improvement action requirements, an assessor may voluntarily engage a mentor to work with them to improve their performance as an assessor.

An assessor who voluntarily undertakes mentoring is responsible for engaging an appropriately qualified and appointed mentor for their purposes, and for determining how many assessments the

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mentor will be engaged for and the topics they will provide mentoring on. The assessor accreditation service provider can provide a list of appointed mentors on request.

CPD points may only be attributed for voluntary mentoring where:

- the selected mentor is a mentor appointed by the assessor accreditation service provider; and
- the assessor accreditation service provider and the assessor agree in advance of the mentoring the number of CPD points which can be attributed, and the content of the mentoring sessions.

To receive CPD, the assessor accreditation service provider will require evidence of completion of mentoring, in the form of an activities log provided by the mentor to the assessor accreditation service provider with a summary of content covered during the mentoring process. The summary must align with the content agreed between the assessor and the assessor accreditation service provider.

### **Figure 3: Scenario where mentor is engaged voluntarily**

As part of his continuous development, Paulo has recognised that he needs to improve his understanding of aspects of the NatHERS Technical Note. He decides to voluntarily engage a mentor to assist.

Paulo approaches his assessor accreditation service provider and seeks agreement on content of the sessions he wishes to claim CPD for. He receives a list of mentors from his assessor accreditation service provider.

Paulo looks over the list of mentors appointed by his assessor accreditation service provider. He chooses to engage mentor Helen for 3 hour long sessions of in-person mentoring. Helen has no areas of conflict of interest with Paulo and is able to advise on his areas of difficulty. As part of engaging Helen, Paulo has provided details of his areas of concern.

Helen provides Paulo with mentoring for the areas of concern and any other issues that arise during the sessions. This is done on 3 assessments Paulo is undertaking.

Helen logs all mentoring done and provides a copy of the activity log to Paulo and the assessor accreditation service provider, to confirm completion of Paulo's mentoring. The assessor accreditation service provider confirms satisfactory completion of the mentoring in line with the agreed content, and awards 3 CPD points to Paulo.

## **4.3 Completing assessments while suspended**

While suspended, assessors are prevented from undertaking NatHERS for existing homes assessments and generating Home Energy Rating Certificates. However, an assessor may receive written permission from their assessor accreditation service provider to submit assessments under the supervision of a mentor.

If this permission is provided, the assessor accreditation service provider will provide the assessor with a list of one or more appointed mentors to choose from.

To submit further assessments, the assessor must engage the services of one of the mentors provided by the assessor accreditation service provider. The mentor will provide feedback and advice on how to correctly complete the assessments.

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For each assessment, the mentor must provide written confirmation to the assessor accreditation service provider that the assessment inputs are correct. The assessor accreditation service provider will then coordinate with the assessor to allow the assessor to generate a Home Energy Rating Certificate for that assessment in the software tool, before their ability to generate certificates is again disabled as part of their suspension.

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## 5 Related information

- NatHERS Technical Note
- NatHERS for Existing Homes Assessor Audit Policy
- NatHERS for Existing Homes Assessor Code of Practice
- NatHERS for Existing Homes Performance Management Policy
- NatHERS Trade Mark Guidelines
- NatHERS Complaints Management Policy
- Department of Climate Change, Energy, the Environment and Water Privacy Policy
- NatHERS Information Collection, Storage and Dissemination Policy.

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Assessors should contact their assessor accreditation service provider for more information.

## 6 Glossary

Term	Definition
<b>AASP</b>	The assessor accreditation service provider (AASP) is the entity that manages the accreditation of NatHERS for existing homes assessors.
<b>Accreditation</b>	The formal approval of an assessor, by an AASP, as someone who is appropriately trained and skilled to conduct assessments.
<b>Assessment</b>	The exercise and activities by which a NatHERS for existing homes assessor undertakes a NatHERS for existing homes assessment to produce a Home Energy Rating Certificate.
<b>Assessor</b>	A person accredited to perform NatHERS for existing homes assessments.
<b>Cancellation</b>	The cancelling of an assessor's accreditation, which means that they may no longer conduct assessments.
<b>Conflict of interest</b>	A circumstance where an assessor holds a personal or business interest that may influence or be perceived by a reasonable person to influence, any part of a NatHERS assessment.
<b>CPD</b>	Continuing Professional Development, which provides a mechanism for assessors to maintain and improve skills and knowledge.
<b>Energy performance</b>	Energy performance is the broad management of energy demand, including: <ul style="list-style-type: none"><li>• energy efficiency – using less energy to do the same thing</li><li>• demand flexibility – varying when and how energy is used</li><li>• electrification or fuel switching – swapping to electricity-powered technologies or other cleaner sources of energy.</li></ul>
<b>Energy rating tools</b>	Software tools used to interpret design or dwelling data to produce NatHERS energy ratings and certificates. This includes both desktop and cloud-based tools and third-party accredited tools.
<b>Home Energy Rating Certificate</b>	The certificate generated by NatHERS energy rating tools for a NatHERS for existing homes assessment. A Home Energy Rating Certificate includes a Home Energy Rating, a Star Rating, as well as other key information including details on a home's emissions.
<b>Mentor</b>	An individual, approved by the AASP or AAO, who is highly proficient in the application and use of one or more NatHERS Energy rating tools and can provide tailored advice and assistance to an Assessor to help them deliver consistent, accurate and reliable Assessments.
<b>Mentoring</b>	The formal process of providing tailored advice and assistance to help an assessor deliver consistent, accurate and reliable Assessments. This advice can cover the application and use of one or more NatHERS Software tools, as well as other skills necessary to be an Assessor.
<b>NatHERS</b>	Nationwide House Energy Rating Scheme.

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Term	Definition
<b>NatHERS Administrator</b>	NatHERS is administered by the Australian Government on behalf of all states and territories. The role of NatHERS Administrator is a function of the Australian Government Department of Climate Change, Energy, the Environment and Water (DCCEEW), or any subsequent Australian Government department that assumes responsibility for residential energy efficiency.
<b>Performance Improvement Action</b>	Refers to any action that the AASP may require an assessor to take to improve the assessor's performance.
<b>Suspension</b>	The temporary pausing of accreditation, preventing an assessor from conducting assessments or issuing certificates.
<b>Tools</b>	Tool is defined as any tool used by an assessor to complete a rating; this includes data collection tools and energy rating tools.

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