



Your Membership Assessment: what to expect

A step-by-step guide for LEEA members

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1 At a glance

The Membership Assessment is an annual review of how your business works, measured against the LEEA Gold Standard. Hard questions, easy process: the questions are demanding because the work is, and the process is designed to take as little of your time as possible.



Once a year

tied to your renewal date.



90 days

your window opens 90 days before your renewal date.



Mostly online

Parts 1 and 2 are desktop reviews, with a virtual or on-site follow-up only if needed.



A few hours

for most members.

2 Your assessment, step by step

Every date is set when your window opens, so you know from day one what is due and when. Your assessment, including any development actions, is completed within your 90-day window. Training actions can run for up to 12 months.

1

LEEA

Your window opens

Your named LEEA assessor emails you a personal link 90 days before your renewal date, with your key dates, helpful guidance and access to the Membership Assessment Handbook. You'll be asked to nominate a main assessment contact for your business.

2

You

Part 1: online desktop review

Complete a short online form about your business, scopes of work and accreditations.

Time allowed: 5 working days.

3

LEEA

Part 2 is released

Your assessor reviews your Part 1 answers and releases Part 2. Your assessment contact receives an email inviting them to register on LEEA's assessment portal.

Time: within 3 working days.

4

You

Part 2: online assessment

Answer the questions for your scopes of work in the assessment portal, uploading evidence as you go. Your assessment contact can give colleagues access to help gather information and answer questions.

Time allowed: 7 working days from release.

5

LEEA

Review and follow-up decision

Your assessor reviews your answers and evidence, and decides whether a follow-up is needed.

Time: within 5 working days.

6

You

LEEA

only if needed

Follow-up

If your answers leave areas to explore, your assessor arranges a virtual or on-site follow-up at a convenient date, covering only those areas. The follow-up may be carried out by a different assessor.

Time allowed: held within 15 working days.

7

LEEA

Your Development Action Report

The outcome of your assessment, with any development and training actions, is shared with you in the assessment portal. If you had a follow-up, you'll also receive a report on its findings.

Time: within 5 working days.

8

You

only if actions are raised

Your development action plan

Submit a short plan in the portal setting out how you will address each development action.

Time allowed: 5 working days.

9

You

only if actions are raised

Complete your development actions

Show the changes you have made in the portal.

Time allowed: 10 working days after your plan.

10

LEEA

Review of your actions

Your assessor reviews your action submissions.

Time: within 5 working days.



Membership certificate

Issued once your development actions are approved and your renewal payment is made.

Training actions run on a longer timescale. Where a competence gap is identified, you have up to 12 months to close it, and you don't need to submit training actions in the portal.

3 What to have ready

The biggest time saver is knowing where your evidence is before your window opens. The LEEA Gold Standard has two parts: Part 1 applies to every member, and Part 2 is set out by scope of work, so you only evidence what is relevant to the work you do. If you hold accreditations such as ISO certification, have your certificates to hand, as they can make the assessment quicker.

Everyone

For Part 1: online desktop review

Have these ready to upload or enter in the form:

- | | |
|---|---|
| ☐ Your company details and key contacts, including who will be your main assessment contact | ☐ Your scopes of work, the products you work with, and any branches or sites that carry out lifting activities |
| ☐ Details of your quality management system certification, if you have one | ☐ Certificates for any other accreditations or memberships you hold, such as ISO 14001, ISO 45001, ISO 17020, EN 1090 or CHAS |
| ☐ Your policies on forced labour or modern slavery, anti-discrimination or equality, anti-bribery and corruption, health and safety, IT security, data protection and environmental sustainability | ☐ The total number of employees across all your locations |
| ☐ A summary of any workplace incidents in the past four calendar years: fatalities, major injuries and over-7-day injuries | ☐ Details of any product recalls, safety notices or significant product safety issues since your last LEEA Audit or assessment |
| ☐ Details of your current insurance, such as employer's, public, product or professional liability | |

For Part 2: online assessment

Make sure you can quickly find and access:

- | | |
|--|--|
| ☐ If your quality management system is certified, your most recent external assessment report | ☐ Your risk assessments |
| ☐ Standard operating procedures, and risk assessments and method statements (RAMS) | ☐ Your change control records |

☐ Your maintenance register and maintenance records

☐ Your calibration register and calibration certificates

☐ Competence matrices or role profiles, training plans and training records for your team

☐ Non-conformance and corrective action records

☐ Your legal and regulatory register

☐ Your approved supplier and subcontractor records

☐ Contractor and visitor induction records, and permits to work

☐ Safety communications, such as toolbox talks or safety bulletins

☐ Your emergency plan and emergency drill records

☐ Your product recall or field safety procedure

☐ Your document control procedure, and internal assessment and quality check records

By scope of work

Then make sure you can access the evidence for each scope of work you cover.

If your work includes	Make sure you can access
Design	Design procedure, design calculations, design review and approval records, design risk assessments, revision records, technical files and installation information
Manufacture and assembly	Material certificates, inspection and test records, product specifications and applied standards, release records, instructions for use, marking details, and declarations of conformity or assembly completion documents
Importing and exporting, including own branding	Manufacturer certificates, traceability records, manufacturers' technical files, storage and handling procedures, and instructions for use and marking for the markets you supply
Sales and distribution	Supply documentation and customer document packs, traceability records, and inspection records for second-hand equipment
Rental and hire	Pre-hire inspection and release records, maintenance records, your equipment tracking system, hire documentation, and records for cross-hired equipment

If your work includes	Make sure you can access
Maintenance and repair	Job and repair records, the standards you work to, technical records for the equipment, return-to-service records, customer handover documents and, for powered equipment, records of control system changes
Modification	Machinery history files, modification records and reports, examination records before release, and updated instructions for use
Periodic inspection	Inspection procedures, sample reports of periodic inspection, test equipment records and defect notification records
Testing	Test procedures or method statements, sample test reports, and calibration and verification records for test weights, rigs and measuring equipment
Calibration services	Calibration procedures and scope, sample calibration certificates, test equipment calibration records and technician competence records
Installation and commissioning	Installation plans, site assessments, commissioning and thorough examination records, and client handover information
Lifting operations (user of lifting equipment)	Lift plans, lift briefing records, lift planner appointments, pre-use inspection records, maintenance and inspection schedules, and machinery history files
Training services	Trainer competence records, schemes of work, training facility risk assessments, insurance covering delegates, training and certificate records, and delegate feedback
Provision of labour	Competence records for the people you supply
Consultation services	Your defined scope of advice, technical references, review and approval records, and consultancy records
Software	Software specifications, test and review records, change and version control records, access control records and user guidance

Your assessor will select which products and records to look at, so keep these up to date and easy to find, rather than gathering them in advance.

For the full requirements, see the LEEA Gold Standard (LEEA 044).

4 How long it takes

For most members, a few hours.

The time depends on how many scopes of work you cover, and having your evidence ready makes it quicker.

Tips for a smooth assessment

- ✓ Know where your evidence is before your window opens.
- ✓ Nominate an assessment contact who knows where your records are kept.
- ✓ Give colleagues portal access for the scopes they know best.
- ✓ Start Part 1 as soon as your link arrives.
- ✓ If anything is unclear, ask your assessor early.

5 Your outcome



Development actions

Things that need addressing. You agree a short plan, then show the changes in the portal.



Training actions

Raised where a competence gap is identified. You have up to 12 months to close them.

Your membership certificate, and your listing on LEEA's Find a Member directory, show customers that your business has been assessed against LEEA's standard.

6 If you need more time

Need more time?

Ask your assessor before the date passes.

Something serious affecting your business?

We'll pause the clock and agree a new timetable.

Delay on our side?

Your dates move back to match.

The assessment is how every member shows they meet the LEEA Gold Standard. Where a member does not complete it despite this support, their membership does not continue.

7 Help and contact

When your window opens, you'll also receive the Membership Assessment Handbook, with full detail on using the assessment portal and completing each step.



Your named assessor is your first point of contact throughout. For anything else, email membership.assessments@leeaint.com

The LEEA Membership Assessment Journey

KEY

LEE A Assessor

Member

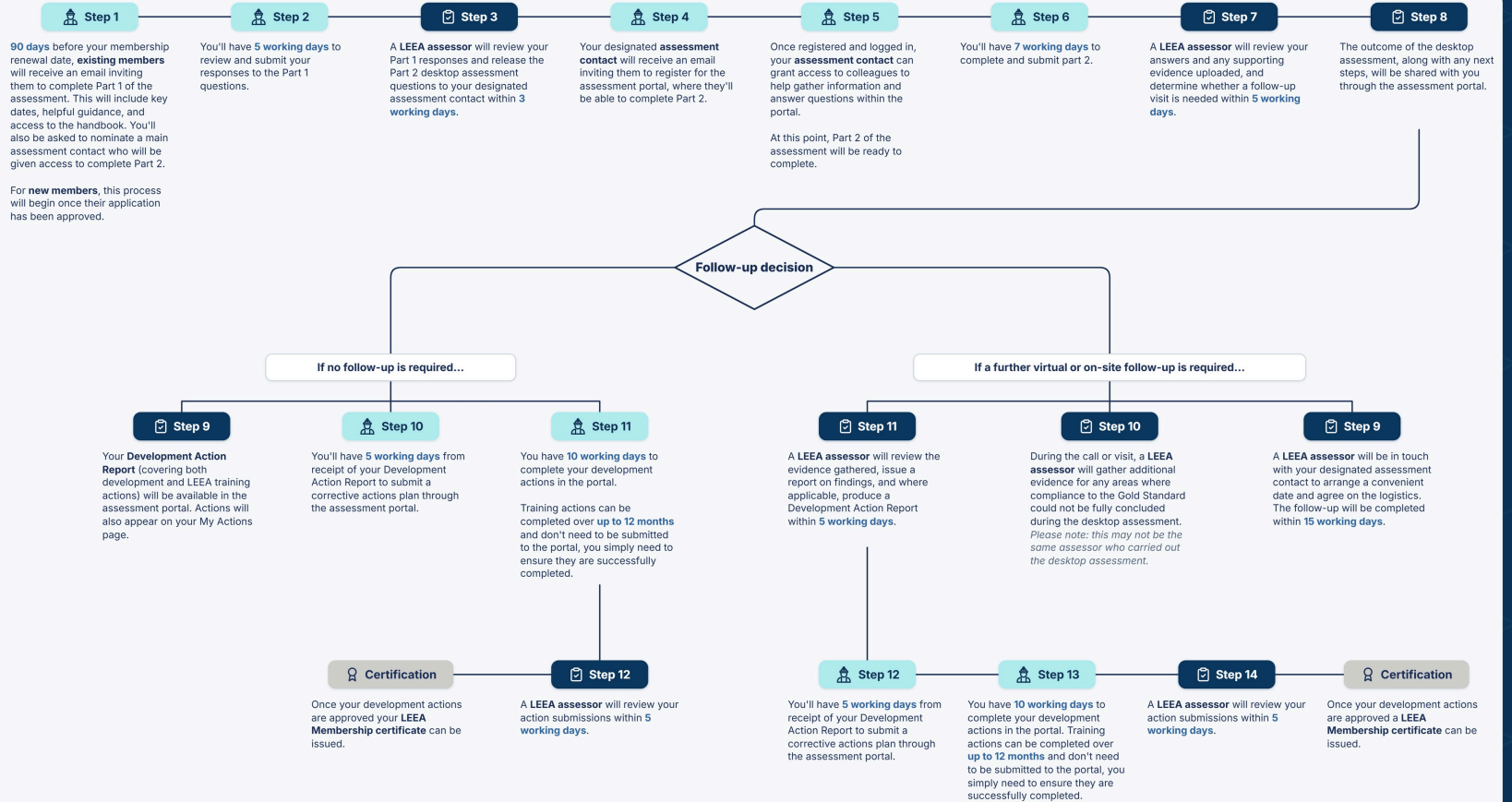


Assessment stages & durations

Timeframe for each stage of the membership assessment journey.

Stage	Duration
Assessment start	90 days before renewal
Member completes Part 1	5 working days
Assessor reviews Part 1, releases Part 2	3 working days
Member completes Part 2	7 working days
Assessor reviews Part 2, shares follow-up decision	5 working days
Follow-up completed (virtual or on-site) IF FOLLOW-UP REQUIRED	15 working days
Assessor reviews findings, issues assessment outcome & development actions	5 working days
Member submits corrective action plan	5 working days
Member completes development actions (excludes training actions)	10 working days
Assessor reviews development actions	5 working days
Membership certificate issued	Upon approval of development actions

If no follow-up is required, this stage is skipped and the journey continues straight to the development actions.



The next assessment cycle will then start the next year, again 90 days prior to renewal date