

FEBRUARY 2008 PROCESS NOTE**RE:****General Information:** BREEAM 2008 update launch**Process Information:** New Guidance for Assessors; Materials Credits: Green Guide Enquires**Technical Information:** Code for Sustainable Homes water calculator; Clarification on the CSH external lighting Ene 6 credit**CSH Update:** Technical Guidance; On-line Reporting System; Post Construction Stage Assessment; Training for Code Assessors; "How to" guide for assessors; Other Code Service Providers

This note is sent to the main contact in your organisation. Please ensure that this information is copied to all other EcoHomes/BREEAM/Code assessors within your organisation.

The following contains important information and news regarding all of our BREEAM Schemes and the Code for Sustainable Homes.

General Information**BREEAM 2008 update launch – important dates**

We can confirm that the final 2008 non-domestic BREEAM Scheme will be published on the BREEAM assessor's extranet on Monday 5th May. BRE will begin to accept registrations, provide technical support and issue certificates for the 2008 scheme from Friday 1st August 2008 onwards.

The period between 6th May and 1st August is intended to allow assessors a period of familiarisation with the 2008 scheme, which includes a number of new strategic and technical changes, e.g. minimum standards, new 'BREEAM Outstanding' rating and its requirements, to name a few.

BRE will continue to accept registrations against the 2006 BREEAM Scheme up to and including Thursday 31st July 2008. It will be possible to pre-register assessments against the 2008 scheme from 5th May 2008.

The first BREEAM training courses in the 2008 scheme will be held from September 2008 onwards.

Further detail on the technical changes to the method will be provided in the March and April process notes.

Process Information**New Guidance for Assessors**

Assessors may provide guidance on meeting the standard and may be a member of the design team. Where this is the case, the assessor shall advise BRE of their position within the design team (e.g. Architect, Design Engineer, Energy Consultant, etc.) They shall also identify, document, review and manage all possible conflicts of interests so that these are eliminated. BRE Global reserves the right to audit such documentation and processes.

Materials Credits: Green Guide Enquiries

Updated Green Guide information will be available on-line from April. We apologise for the delays that assessors have been experiencing in response to enquiries relating to materials credits. We are now very close to the point of releasing the long awaited updated Green Guide, and have necessarily diverted resource to this task to ensure no further slippage to the release date. In the short term some continued delays can be expected, and we are sorry for this, but we will answer all queries just as quickly as possible, and expect to be back to normal service within two – three weeks.

Technical Information

Code for Sustainable Homes water calculator

There was an error with version 3 of the Code water calculator (issued 07/12/07). Where entering multiple fittings, the calculator was multiplying rather than averaging across the fittings which overestimated the water consumption. This has now been corrected with version 4 added to the extranet on 14/01/08.

Clarification on the CSH external lighting Ene 6 credit

All external lighting not attached to the building that is powered by energy coming from the building should be included in the assessment of the external lighting credit.

In the case of blocks of flats, all the flats will receive the same score for this credit. In other words, all external lighting is to be assessed as a group and each flat will be awarded the same number of credits as a result of the overall external lighting assessment.

CSH Update

Technical Guidance

The technical guidance is being reviewed to incorporate comments / feedback from assessors, industry and CLG. Version April 08 will be available for download from the Planning Portal website (www.planningportal.gov.uk) by Sunday April 6th.

The focus of this revision is to clarify ambiguities and bring the document into line with new legislation. Changes are being kept to a minimum.

There are a couple of major changes to bring to your attention:

Surface Water Run-off:

The Surface Water Run-off section has been restructured to take the new PPG25: Development and Flood Risk into consideration. This will result in changes to the criteria which are still under development. We will communicate these ASAP.

Energy:

Ene 1 has a number of changes worth noting:

- Small Scale Wind (Micro generation) now dealt with under appendix M
- An option for Domestic Hot Water only to be produced from a community solar system.
- Community hot water schemes are now allowed under SAP - new option DHW from community scheme.
- Default factors for "in use" to be used for a variety of Mechanical Ventilation Systems. MVHR now recognised under SAP and not dealt with under Appendix Q

- Community Geothermal heating systems now the same as waste heat from Power Stations.
- CO₂ emissions associated with appliances and cooking is now explained in Section 14 of the main SAP text and can be factored in when building Zero Carbon properties
- PV output on a block of flats to be averaged across the dwellings by net floor area. This includes instances where they serve only common parts.
- There is now a wood pellet stove with boiler in the options with options for water and heating and water.

In addition, the evidence requirements for all issues have all been reviewed with an aim to make them as easy and streamlined as possible, while still ensuring the scheme remains technically robust.

On-line Reporting System

The on-line reporting system is currently being tested and will be ready for general release on Monday April 7th. A technical manual is being produced to accompany the system to guide assessors through the reporting process. The aim is to speed up the reporting process as much as possible. This will be available on the same date.

Post Construction Stage Assessment

We are keen to provide some additional information on the Post Construction Stage Assessment (PCSA) process and provide reassurance on its similarity to the Design Stage assessment. We are aware that uncertainty over this process has caused concern amongst assessors and industry.

The outline process is straightforward as you would expect:

- Look at what was planned
- Look at what has actually been constructed
- Gather the necessary evidence (as set out in the technical guidance)
- Re-assess each issue for each dwelling where changes have occurred
- Assign the appropriate number of credits

If a Design Stage assessment has been undertaken, this can be used as the starting point for the PCSA. The PCSA is carried out to confirm that houses are either, built to the Design Stage specifications, or if there are variances from the Design Stage, these are documented, reassessed, and a new score and Code Level calculated for each dwelling that is affected.

Much of this can be done while the properties are being constructed. There are only a few issues that must be assessed towards the end of construction e.g. the air-pressure testing.

If there has been no prior Design Stage assessment then the full assessment will need to be completed against the “as built” dwelling(s).

The process is to include:

- An appropriate number of site visits for each development site (at least once per site). The appropriate number of site visits is dependent on the particular situation. It is the assessor who is to determine the necessary number of site visits required to satisfy themselves that the assessment properly reflects the dwelling. We will be offering further guidance on this as part of the “how to” guidance referred to below.
- Every different specification for each issue needs to be reviewed and documentary evidence recorded to confirm that it complies with the requirements for PCSA.
- Where dwellings of identical construction type are planned to be released in phases, the assessment evidence must show that the same specifications have been incorporated into dwellings completed following the initial release. If there are variances to the specification in subsequent releases, the assessor will need to reassess the dwellings based on the new specifications.

The number of PCSA reports is likely to be based on the phased completion of dwellings within a development. The number of PCSA reports submitted to cover a particular development is entirely at the discretion of the assessor (and developer).

For a large or phased development, there are some issues that will not be complete when a PCSA report for the first dwelling(s) is submitted to the Code Service Provider. These could include some ecology credits or community-based facilities for instance. It is possible to certify these first dwellings without certain issues actually being complete. The details of these exceptions will be listed in the April 08 technical guidance document.

Note: These procedures may be subject to change in light of CLG (or others') comments.

Training for Code Assessors

As part of our UKAS requirements we need to ensure the ongoing competence of assessors. Those assessors who have taken the full Code training and passed the Code exam have demonstrated this. For those assessors who qualified as a Code assessor through EcoHomes grandfather rights (i.e. EcoHomes Assessors licensed prior to October 2007, and who attended Code 'top up' training), it is necessary to demonstrate their competence by either:

- completing two satisfactory Code assessments (Design Stage or Post Construction Stage)
- or
- undertaking an additional day of training, passing the exam. The cost of this will be £250

We require that assessors have demonstrated compliance as above by **April 6th 2009**.

“How to” guide for assessors

BRE Global is producing a “how to” guide for assessors. The aim of this document is to give step-by-step instruction from registration to final certification.

This will be prepared once the technical guidance and on-line reporting system is finalised. We anticipate it will be ready for release in May.

Other Code Service Providers

The Code for Sustainable Homes is being managed by BRE Global (formerly known as BRE Certification Ltd) under contract to CLG using arrangements based on BRE Global's EcoHomes operating systems. Under these arrangements all Code assessments are carried out under licence by a wide range of organisations. BRE Global's role is to ensure that CLG's requirements are met through the provision of:

- assessor training
- registration and monitoring
- quality assurance of assessments
- certification
- investigation and resolution of complaints
- maintenance of records

Other organisations have approached CLG to deliver these services for the Code under a sub-licence agreement with BRE Global. For further information see www.breeam.org/filelibrary/CSH_Guidance_Notes_for_Prospective_Service_Providers.pdf which sets out the basic requirements for organisations wishing to carry out these activities.

Currently there is one other organisation, Stroma, with a sub-licence to deliver the services of a Code Service Provider. Stroma are currently putting their systems in place as agreed and are working to conform to contract requirements by the end of February.

New Code Assessor Training Courses

There are now two organisations, Alan Pither Limited and Sustainable Homes, that have been contracted to provide Code Assessor training courses for prospective assessors wishing to be part of the BRE Global Assessor Network. Please note, bookings for Code Assessor Courses by Alan Pither Limited are being handled by BRE Global - <http://www.breem.org> (follow the links to training and events). Bookings for Code Assessor courses from Sustainable Homes should be made directly with Sustainable Homes (<http://www.sustainablehomes.co.uk/>).

If you have any questions regarding anything written here please send your enquiry to CSH@bre.co.uk.