

JANUARY 2008 PROCESS NOTE

RE:

General Information: BREEAM 2008 – Update, BREEAM Healthcare Awareness Seminars, Clarification of the scope of the Bespoke BREEAM scheme, Bespoke BREEAM assessor training, BREEAM Fees

Process Information: BREEAM Schools New Assessment Checklist, BREEAM Multi-Residential Process Update, Code for Sustainable Homes – Operations Manual Technical Queries

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

The following contains important information and news regarding all of our BREEAM Schemes.

General Information

BREEAM 2008 - Update

The BREEAM 2008 update is progressing and still due for launch at the end of April 2008, with a draft version available for assessors to download from the extranet at the end of March.

The main emphasis of this BREEAM update is twofold:

1. To consolidate the method and ensure the focus of BREEAM remains on recognising, and driving improvement of the sustainability of new buildings.
2. To ensure consistency across the different versions where relevant, building on the work done towards this objective under the 2006 version.

A detailed outline of the changes to individual credits will be provided with the draft version of the method. In summary however, the main changes and additions to BREEAM will be as follows:

- The environmental section weightings will be updated to bring them into line with the weightings that underpin the Code for Sustainable Homes and the new Green Guide to be published later this year. The number of credits available within each section is also being reviewed as a part of this exercise in order to appropriately re-balance the percentage value of individual credits.
- The Management & Operation requirements will be removed from the 2008 version. BREEAM M&O will be replaced by 'BREEAM In Use' during summer 2008. BREEAM In Use is currently under development and will be a new, stand alone, version of BREEAM for all non-domestic existing buildings.
- A new BREEAM rating level, called 'Outstanding,' will be introduced. This new rating level is being added to recognise exemplar sustainable buildings. It will include additional requirements and minimum standards that go above those which are typically required to achieve a Pass, Good, Very Good and Excellent rating.
- The introduction of minimum BREEAM standards for each rating level, i.e. a requirement to achieve particular BREEAM credits as pre-requisites for the award of each BREEAM rating.
- The introduction of 'innovation credits': these will be additional credits (and therefore percentage points towards overall BREEAM score) to be available for implementing innovative technologies and products, not currently recognised by BREEAM, that have a tangible environmental benefit.

- Post Construction Review is to become a formal part of the certification process. Please note that from the date of the update the Design and Procurement Certificate will in future carry only an 'Interim Certificate' status – Full BREEAM Certification will only apply to buildings that have a completed Post Construction Review/Assessment
- E1 methodology will be updated to account for the new version and output from the National Calculation Methodology developed to calculate EPC ratings. This output from the NCM is different from that used to demonstrate compliance with Part L.
- Some credits that are oriented towards 'operation/process', for example, energy credits that are available for laundry equipment or catering areas, are being removed. This is to ensure that BREEAM remains focused on assessing physical site and building related impacts and the relevant processes involved in the design, construction and commissioning of a building.
- The amendment of requirements relating to construction site waste to reflect the legislation that introduces new mandatory site waste management plans from April 2008.

Clarification of the scope of the Bespoke BREEAM scheme

The purpose of the Bespoke BREEAM scheme is to allow buildings which do not fall into the remit of the standard BREEAM schemes to be BREEAM assessed. Its aim is to ensure that the set of issues and requirements are appropriate for the functions within the building. While the method is bespoke, it still adheres to a set of standards in terms of BREEAM structure, credit method and content. This ensures the integrity of BREEAM is maintained. Appropriate credits are selected from a standard pool to provide criteria against which the building can be assessed. The scheme adheres to some basic fundamentals:

- Credits common to all BREEAM schemes will form part of the criteria set. Common credits are those applicable to any building type *e.g. M1: commissioning*
- Credits applicable to the building functions/function areas will form part of the criteria set. Where it is not appropriate for a credit to be applied, it will be excluded *e.g. HW1 Daylighting would be excluded from dark rooms.*

Please note the purpose of criteria development is not:

- To remove those credits that may be difficult to achieve for the project
- To develop new credits, or extensive new guidance for existing credits.

Bespoke BREEAM assessor training

A Bespoke BREEAM Assessor training booking form is now available for assessors to book themselves onto Bespoke BREEAM training courses. This form is available on the extranet at the 'BREEAM Assessor Guidance' link. All licensed assessors regardless of scheme should have access to this link. If you do not have access but are a licensed assessor please contact the BREEAM Office.

Please note that while you may wish to train, you must meet the pre-qualification requirements below. If you do not, your booking form will not be processed. The requirements are listed below.

Who Should Attend?

Only assessors who meet the pre-qualification requirements can attend. In order to become a Bespoke BREEAM assessor, you must meet the following requirements:

1. Trained, qualified and licensed under a non-domestic BREEAM scheme *i.e. Offices, Retail, Industrial or Schools.*
2. Completed (to certification) at least one non-domestic BREEAM assessment with a satisfactory QA result (the project should have been originally registered in your name; where this is not the case, see below).
3. Trained, qualified and licensed in EcoHomes or the Code for Sustainable Homes

Becoming a 'Bespoke' BREEAM Assessor – completion of full BREEAM assessment

As part of our UKAS & ISO9001 requirements BRE have to be able to show that all assessors wishing to become Bespoke BREEAM assessors have been through the formal standard BREEAM process at least once. To meet this aspect of the pre-qualification requirements, a non-domestic BREEAM assessment should originally have been registered in your name. In the event that you completed an assessment which was not originally registered by you, you must provide evidence which demonstrates that you have been through the full BREEAM process. We would therefore ask you to confirm:

- that you were the main assessor who attended and ran the formal assessment meeting and prepared the assessment report for that project

and to provide,

- samples of documentation, such as letters of correspondence between you and the design team (e.g. emails) or meeting minutes, supporting the above.

Once we receive this information we will be in a position to assess whether you meet the pre-qualification requirements for training as a Bespoke BREEAM assessor. Please ensure you provide this information when you submit the booking form.

The next assessor training course will on 18th February 2008.

BREEAM Healthcare Awareness Seminars

BREEAM has been appointed by the Department of Health to update the technical content of the existing self-assessment tool NEAT into the third-party certified assessment scheme BREEAM Healthcare. This new scheme, which will be launched summer 2008, will follow the structure and processes of the other BREEAM schemes.

From the launch of BREEAM Healthcare, new built and refurbished healthcare facilities in England, Wales and Scotland will be required to carry out BREEAM Healthcare as part of the NHS approval process.

To promote the new BREEAM Healthcare scheme, two awareness seminars will be held at BRE, Garston, Watford, in February and March. The cost of these seminars is £125 plus VAT per delegate. For more information or to book a place, please contact the BREEAM office or visit the BREEAM website's events page: <http://www.breeam.org/events.jsp>.

BREEAM Fees

In the December 2007 process note we gave notice of the increases in Fees for BREEAM, EcoHomes and the Code for Sustainable Homes, to take effect from April 2008. This information is attached again as Annex A.

Please note, the descriptions in the Fees table (not the fees themselves) have been amended to give more clarity to how these will be applied in relation to the requirement for Post Construction Review/Assessment for 'Full Certification', which is being introduced in all schemes with the 2008 update.

Also note that we are currently reviewing the Fee arrangements applying to non-domestic schemes for situations where multiple units on the same site are being assessed. We plan to issue guidance on this alongside the 2008 update.

Process Information

BREEAM Schools New Assessment Checklist

Following positive feedback regarding the new assessment checklist, we have decided to make this tool available on the extranet. You may continue using the previous Word format for your assessment if you wish, but the new Excel format should save time when producing the report. However, the checklist is only for the 2006 version, If you are using the Schools 2005 assessment method please continue to use the usual format. Further details have been sent

to all BREEAM Schools assessors via email and the assessment checklist can be downloaded from the BREEAM Schools extranet.

BREEAM Multi-Residential Process Update

As publicised at the assessor day in September, from January 2008 the process for BREEAM Multi-Residential is being brought into line with all other standard BREEAM schemes. The assessment criteria and scoring spreadsheet will be freely available to all licensed multi-residential and Bespoke BREEAM assessors via the assessor extranet.

From January, to register a development for a multi-residential assessment, submit a registration form found on the multi-residential extranet along with floor plans to breeam@bre.co.uk. The £750 fee for use of the criteria has been dropped which removes the need to obtain a proposal in order to register. As with all schemes the Certification (QA) fee will be changing from 1st April 2008 and for multi-residential will be £950 per assessment.

BREEAM Multi-residential can be used to assess student halls of residence, sheltered housing such as care homes, retirement homes and some hostels. Guidance on the scope of the scheme can also be found on the extranet and the BREEAM website, www.breeam.org.

Code for Sustainable Homes: Operations Manual (Interim Draft for Comment)

The Code for Sustainable Homes: Operations Manual for BRE Licensed Organisations and Registered Assessors is attached, and can also be found on the Code Assessors Extranet. This interim version of the manual is intended for your use, and also for your comment. Comments received will be used in the preparation of the next version of the manual, which will be issued ready for the transition to the automated Codes processes and systems.

If you wish to provide comments would you please do so on the comments form attached (and also available on the Extranet). Please e-mail the comments form to Jerniganem@bre.co.uk (please do not use this e-mail for any other reason) Thank you in advance for any comments you provide – these will be of considerable help in the preparation of the next Version

Technical Queries

We would like to make you aware that as part of our new process for Domestic and Non-Domestic **Technical** queries we are prioritising assessors who are registered and licensed within the scheme that their query relates to. This ensures that queries coming to the technical teams are queries that really require BRE input, not queries that are answered within the manuals or as part of the training. We currently receive approximately the same number of technical queries from non assessors as assessors and this is hindering the service we aim to provide to our licensed assessor network.

We are looking into providing a technical service for non-assessors; however for the moment we will be advising non-assessors of the following in regard to their technical queries:

- Their query will be passed to our technical team but queries from assessors will take priority;
- If we can provide an answer easily we will respond by e-mail, alternatively we will advise them to either:
 - Refer to the manual on the website (if this is appropriate to the scheme),
 - Contact a licensed assessor (this could be within their own organisation).
 - Attend a BREEAM training course,

This also applies to assessors not licensed in the scheme that their query relates to and non assessors working in a licensed organisation enquiring on behalf of an assessor. Our experience is that such queries, in the majority of cases, could be dealt with by an assessor experienced in the scheme concerned.

We trust you will notice an improvement in our level of service as a result of this process.

BRE Charges for Licenses and Certification	
Certification Fees (formerly referred to as QA fees)	
BREEAM Industrial, BREEAM Offices, BREEAM Schools, BREEAM Bespoke, BREEAM Courts, BREEAM Further Education	
Design and Procurement (interim certificate) Post Construction Review (final certificate) Post Construction Assessment (without interim D&P certification) Management and Operation - only applicable to Offices (and Retail - see below)	£850.00 £380.00 £1230.00 £850.00
BREEAM Prisons	
Design and Procurement (interim certificate) Post Construction Review (final certificate) Post Construction Assessment (without interim D&P certification)	£1140.00 £500.00 £1640.00
BREEAM Retail	
Design and Procurement (interim certificate) Fit Out (interim certificate) Post Construction Review (final certificate) Management and Operation <u>Fit out and M&O – Building Portfolios (with certificate required for each unit)</u> After the completion of an initial assessment, further assessments of repeat units (with same retail function), attract a 30% reduction in BRE QA/certification fees. This reduction does not apply to an assessment of a standardised fit out specification, which is subject to the full QA/certification fee. Note: BRE does not issue M&O certificates covering building portfolios - certificates can only relate to single buildings.	£805 + £85 per additional function £575 + £85 per additional function £365 + £45 per additional function £800 + £85 per additional function

The above fees are for the assessment of an individual non-domestic building. Please contact BRE for information concerning certification fees for multiple units on the same site.

EcoHomes	
<u>Design Stage</u> For sites of more than 30 units or more – charge per unit is: For sites of less than 30 units a minimum charge applies of:	£8.00 £250.00 £25:00 £250.00
<u>Post Construction Review</u> First set of dwellings/dwelling types (the initial PCR) per unit is: For sites Less than 10 units a minimum charge applies of:	£20.00
<u>Releases of Homes with Dwelling type already assessed (Repeat PCR) per unit</u> No Minimum Fee	
Code for Sustainable Homes	
Certification Fee The full certification fee per dwelling will be payable upon submission of the Interim Assessment report (Design Stage) or, at the time of submission of the Post Construction Assessment Report (whichever is sooner)	£37 per dwelling Subject to minimum of £375.00 per development
BREEAM Multi-Residential	
New designated scheme replaces breeam:domestic bespoke Certification Fee	£950

License Fees	
Non-Domestic Buildings	
<p>Core Fee Applicable with any non-domestic licence plus supplementary fees to cover each scheme</p>	£1600
<p>BREEAM Offices This fee includes the registration of up to four assessors. Further assessors can be registered for £350.00 per annum.</p>	£1070
<p>BREEAM Schools This fee includes the registration of up to four assessors. Further assessors can be registered for £350.00 per annum.</p>	£1070
<p>BREEAM Industrial This fee includes the registration of up to four assessors. Further assessors can be registered for £350.00 per annum</p>	£1070
<p>BREEAM Retail This fee includes the registration of up to four assessors. Further assessors can be registered for £350.00 per annum.</p>	£1600
<p>Bespoke BREEAM Licence only applicable with any appropriate non-domestic licence (Offices, Schools, Retail).</p>	£375
<p>BREEAM Prisons To become licensed to carry out BREEAM Secure Prison Accommodation assessments an organisation must hold the following type of BREEAM licences: Core licence fee PLUS bespoke licence fee OR any non-domestic licence PLUS prisons specific licence fee, this is payable per individual.</p>	<p>£1600 £1070 £375</p>
<p>Any organisation/individual with a full bespoke BREEAM licence is entitled to carry out Secure Prison Accommodation assessments without the need to pay an additional Secure Prison Accommodation specific licence fee.</p>	
<p>All For registered companies with 10 or less employees there will be a reduction in the annual NON-Domestic CORE licence fee of £250 per assessor up to a maximum of two assessors. In order to qualify for an initial fee reduction when the licence fee comes up for renewal, the company must forward evidence each year of the total number of employees to BRE.</p>	

Homes	
<p>EcoHomes and Code For Sustainable Homes³ Annual Licence fee for an Assessor to be licensed to perform EcoHomes and Code assessments (provided properly qualified)</p>	<p>£375.00</p>
<p>BREEAM Multi-residential⁴ In addition to holding an EcoHomes/CSH License and paying an EcoHomes/CSH licence fee.</p>	<p>£375.00</p>