



## Inside July's Process and News Note

- **OPERATIONAL:** Important changes to Assessor license agreements
- **DOMESTIC:** SAP clarification
- **NON-Domestic:** BREEAM Non Domestic Update ; Operations Manual ; BREEAM Education ; Management and Operation Assessments; BREEAM International FAO's
- **LATEST NEWS AND MARKETING:** 2008 BREEAM Awards, Event reminders

### MAJOR CHANGES TO BREEAM LICENCE AGREEMENTS

BRE Global has been harmonising terms and conditions across the company including revising the BREEAM Licence Agreements. A new licensing arrangement covering all of our BREEAM schemes will be in place shortly.

The new Licence Agreement consists of:

- BRE Global Terms and Conditions
- A BREEAM Licensing Schedule (Schedule 1) which gives additional Terms and Conditions for BREEAM
- Schedule 2 summarises the schemes.
- Schedule 3 summarises the entitlement of the assessment organisation and listed registered assessors to carry out assessments
- An application letter
- A proposal letter

### LICENSING FEES

#### MINOR CHANGES TO BREEAM LICENCE AGREEMENTS

In addition some minor changes have been made to the BREEAM Licence Agreement. The most important of these changes are summarised below.

There is a new clause which states that the Assessment organisation acknowledges that Communities and Local Government (CLG) is the owner of the 'Code for Sustainable Homes' trademarks (registered and unregistered) and you should contact CLG for their terms and conditions on use of the Trademarks.

In addition, in response to questions raised on our training courses, we have now included a revised clause which gives more details of the financial limits of the professional indemnity insurance required by Assessment organisation. These are set at a minimum of £250,000 increasing to a maximum of £5,000,000. The actual amount will be based on your business turnover (in terms of gross fees earned within the UK) in the last financial year before any relevant period of insurance.

In the future BRE Global will be releasing online lists of certified BREEAM buildings, we will not be releasing the full report but anticipate to release basic assessment information that may include the following:

Development Name  
 BREEAM Rating  
 BREEAM Scheme  
 BREEAM Version  
 BREEAM Assessment Organisation  
 Design Team details  
 Location

Assessor licenses are being changed to reflect this. If BRE Global produce more detailed case studies beyond this the BREEAM Assessor Organisation will be informed.



**The use of SAP 2005 for EcoHomes 2005/2003 assessments**

After further testing to compare the two methodologies, we can confirm that it is now acceptable to use SAP2005 for an EcoHomes 2005 assessment, as an alternative to SAP2001. This mainly applies to schemes being built to 2006 Part L requirements which require SAP2005 worksheets for building regulation compliance. Other schemes being built to 2002 regulations can continue to use SAP2001 as normal for an EcoHomes 2005 assessment.

The EcoHomes 2005 methodology for Ene1 and Ene2 must be followed and the DER from SAP 2005 cannot be used due to the different emissions factors compared to EcoHomes 2005 and also due to other differences.

Assessors must use the EcoHomes 2005 Ene1 calculator tool to work out the CO<sub>2</sub> emissions using the figures taken from SAP 2005 such as energy required for space heating, water heating and pumps and fans. The Ene1 calculator indicates the relevant SAP box numbers for these figures which are the same for SAP 2005/2001 (although different box numbers are used for community heating/CHP). These figures are quoted in kWh/year in SAP2005 which needs to be divided by 277.8 to convert to GJ/year as is used for EcoHomes2005.

Ene2 can be assessed using the U-values and areas from SAP 2005 to work out the average improvement in U values as is calculated for EcoHomes2005 rather than the HLP as is used in EcoHomes 2006 and the Code.

EcoHomes Version	Building Regulations	SAP Version
2002	ADL1 2000, 2002 edition	SAP 2001
2003	ADL1 2000, 2002 edition	SAP 2001
2005	ADL1 2000, 2002 edition	SAP 2001 or SAP 2005
2006	ADL1A and ADL1B 2006	SAP 2005

**BREEAM Operations Manual**

We are pleased to announce release of the first issue of the BREEAM Operations Manual for Non-Domestic Schemes. The manual is a step-by step guide to BREEAM Assessment procedures. It explains the training and licensing requirements for individuals and companies. the processes of assessment registration, report completion and submission, and the quality assurance process. The manual is now available to licensed assessors on the BREEAM extranet at [www.breeam.org/extranet](http://www.breeam.org/extranet)

**BREEAM International FAQ's**

We are pleased to announce the addition of our BREEAM International FAQ's to our website. Please visit <http://www.breeam.org/international> to view the document.

If after reviewing these you have further queries please contact us at [BREEAM@bre.co.uk](mailto:BREEAM@bre.co.uk)



**BREEAM EDUCATION**

**Existing BREEAM Schools licence**

Under the 2008 BREEAM version the Schools and new Further Education schemes have been consolidated into a single scheme called BREEAM Education. A valid BREEAM Schools licence will automatically cover the new BREEAM Education scheme. From the 1st August 2008 assessor's holding a valid BREEAM Education (or BREEAM Schools licence) may register assessments covered by the scope of the 2008 BREEAM Education scheme.



Please note: Initially, the current 2006 draft version of BREEAM Further Education could only be used for assessments by BREEAM Bespoke assessors. Assessments registered to this draft version of the scheme may now be assessed by either BREEAM Bespoke or Schools assessors. As of the 1<sup>st</sup> August 2008 assessments of further education buildings can only be carried out by BREEAM Education assessors.

**BREEAM Education training**

In September 2008 we shall be delivering the first assessor training specifically for the new 2008 BREEAM Education scheme. Existing qualified assessors in the BREEAM Schools scheme are not required to undertake any additional training and will, by default become "BREEAM Education" assessors.

**BREEAM Higher Education**

BRE Global, in collaboration with Higher Education (HE) sector stakeholders, have begun development of a Higher Education BREEAM scheme. This is due to be rolled out in April/May 2009. We expect the HE version will form an additional arm to the BREEAM Education scheme. If this requires top-up training for BREEAM Education assessors, this will be confirmed at a later stage in the development of the scheme.

**Management & Operation assessments**

Assessors should note that the M&O assessment criteria for Offices and Retail are not included in the 2008 version of these BREEAM schemes. BRE Global is currently developing a new strategy for using BREEAM to assess and mitigate the environmental aspects of existing buildings. This will lead to a new scheme, the current title of which is "BREEAM In Use".



Assessors with clients wishing to certify their existing operational buildings against the BREEAM standard, prior to the launch of BREEAM In Use, can continue to register such projects against the 2006 M&O version of BREEAM.

BRE Global will provide assessors with further information on BREEAM In Use in subsequent Process Notes.



### Final BREEAM 2008 Assessment Manuals

The non domestic 2008 BREEAM assessment manuals for the standard schemes are now publicly available for download from the BREEAM website.

The assessment manuals on the assessors extranet have also been updated; these are the final versions of the new schemes. Please note that some minor modifications have been made to the draft version that was placed on the extranet on 6<sup>th</sup> May 2008. Assessors should therefore discard the draft version and download the final version from the extranet or BREEAM website (in particular noting the additional sections outlined below and the important information contained therein).

The following sections have been added to the final version of the manuals:

- Introduction
- Scope of the Scheme
- Scoring and Rating

#### Introduction

This section includes a brief explanation of the following:

- What is BREEAM
- Development & Governance
- Technical & Commercial credibility
- The BREEAM Scheme Assessor Manuals
- Understanding the BREEAM Manuals – Worked example
- Terms & Conditions of use

This section has been added to aid a non assessor who has downloaded a scheme’s assessment manual for reference. The information contained within this section will be familiar to assessors, but useful nonetheless.

#### Scope of the Scheme

This section includes the following:

- Detailed definition of the stages of assessment and type of buildings and projects that can be assessed using a particular 2008 scheme
- Standard guidance on the assessment of multiple buildings, of the same type, on the same site
- For BREEAM *Offices, Retail* and *Industrial* 2008 schemes, the approach to assessing speculative buildings and fit-out projects

#### Scoring and Weighting

This section includes the following:

- 2008 rating benchmarks and weightings
- 2008 minimum standards
- Process and eligibility criteria for BREEAM Innovation credits

BRE Global has also taken the opportunity to standardise the BREEAM Rating benchmarks across all non domestic BREEAM schemes. The benchmarks for the 2008 version are detailed in table 1.

BREEAM Rating	% score
UNCLASSIFIED	<30
PASS	≥30
GOOD	≥45
V GOOD	≥55
EXCELLENT	≥70
OUTSTANDING*	≥85

\* Additional requirements apply.  
Table 1

#### BREEAM 2008 assessor’s spreadsheet tools, report templates and pre-assessment estimators

BRE Global is currently developing the 2008 spreadsheet tools, calculators and report templates. These will be uploaded to the assessors Extranet prior to the 1<sup>st</sup> August 2008 ‘go live’ date for the BREEAM schemes.

The 2008 Pre-Assessment Estimators for the standard non domestic schemes will become available via the BREEAM website at the same time as the assessors spreadsheet tools. BRE Global intends to develop a simple spreadsheet based pre-assessment estimators, therefore moving away from the paper-based versions currently used for schemes such as BREEAM Offices and BREEAM Schools.

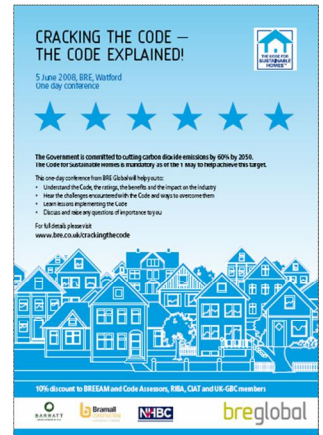


### Cracking the Code: Speaker Presentations

The one day conference Cracking the Code took place at BRE on the 5th June 2008. Delegates were offered the opportunity to:

- Understand the Code, the ratings, the benefits and impact on the industry
- Hear the challenges encountered with the Code and ways to overcome them
- Learn lessons implementing the Code

To download the presentations please visit <http://www.breeam.org/page.jsp?id=106>



\*Please note you will need to register your details to view these presentations. A new login will need to be set up as this registration facility is separate to the BREEAM Extranet.

### BREEAM Supplement

Building's BREEAM Supplement Beyond Excellent has been released. A copy of the supplement can be downloaded from the latest news section of the BREEAM home page.



To download a copy please visit [www.breeam.org](http://www.breeam.org)

### The Green Guide Online

The new version of the Green Guide to Specification is now available online to all, giving designers and specifiers easy-to-use guidance on how to make the best environmental choices when selecting construction materials and components.



The Guide is available at [www.thegreenguide.org.uk](http://www.thegreenguide.org.uk)

### EVENT REMINDERS

**Putting a Price on Sustainable Schools**  
**ONE DAY CONFERENCE, 1 JULY 2008, WATFORD**  
**10% BREEAM ASSESSOR Discount**

Presentations for the day available for download for [www.breeam.org](http://www.breeam.org) soon



**Making Sustainable Communities, A vision for the future – ONE DAY WORKSHOP**

To register your interest please E Mail [events@breglobal.com](mailto:events@breglobal.com).

