



Inside September's Process and News Note

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- **NON-DOMESTIC: BREEAM 2008 - Assessment Manual Issue 2.0; Assessment Tools; Calculator Tools.** information regarding BREEAM Healthcare, BREEAM Education (Important to Bespoke assessors), BREEAM Prisons and Bespoke BREEAM
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Introducing BREEAM Technical Customer Service

In order to support our assessors and provide you with timely and technically accurate responses, we have been reviewing some of our process relating to this area. Over the next few weeks we will be introducing new aspects to our processes, specifically when dealing with technical queries.

The customer service department will become the first point of contact for all technical scheme-related queries. The aim of the department is to manage all technical enquires efficiently and to provide a consistent, accessible, proactive and responsive service to licensed assessors, by ensuring all technical queries are logged, referenced and trackable.

The customer service department is a dedicated department for licensed assessors.

Technical queries can be logged via telephone and email; however, only emailed queries will be accepted from trainee assessors, for Green Guide queries, and BREEAM International queries. The email address for technical customer service is: BREEAMTechnicalCS@bre.co.uk

Further information regarding this service will be communicated to you via Process and News notes and the Extranet

Changes – Assessor technical queries

You will notice some changes to how your queries are responded to over the coming months. All these changes are to ensure long-term improvements to the quality, accuracy and speed of service we offer to our assessors. The following changes have been adopted as a result of close analysis of assessor queries in the last few months.

The Changes

Queries related to the technical guidance

We have noted that a number of assessor queries received could be answered by careful reading of the appropriate technical guidance. In the future, all of these queries will be answered by directing assessors to relevant part of the appropriate technical guidance

Incomplete Queries

Where queries are received with unclear or incomplete questions these will be referred back to the sender for clarification – this will ensure that we are clear about what is being asked and can respond appropriately and accurately without unnecessary delay to the assessment.

Queries specific to client design

In addition, many queries we receive are presented as a situation that has arisen in a design for a development where the assessor needs to offer advice to the client on how to achieve the required credits. The technical support service we offer does not include consultation on an assessor's client's design.

Help we need from you & Future Improvements

Where possible we would request that relevant supporting information be included, to assist our technical staff in making decisions when any type of query is submitted.

We are in the process of developing and introducing a new query proforma which will enable us to manage your queries in a more effective manner.

Full instructions will be communicated to assessors ahead of any changes via Process and News Notes and information posted on the extranet.



The Code for Sustainable Homes: October 2008 Update

The October 2008 version of the Code for Sustainable Homes Technical Guide will be released on 6th October 2008. The Technical Guidance has been revised to ensure the performance requirements are aligned with current legislation and to add clarity to areas where stakeholder feedback has deemed it to be necessary.

The revised Code Technical Guidance will be available as a free download from the Planning Portal website from 6th October 2008 and will come into effect from 3rd November 2008. No registrations or assessments under this version can be submitted prior to 3rd November.

<http://www.planningportal.gov.uk/england/professionals/en/1115314116927.html>

The new Code Guidance will be accompanied by a detailed Summary of Changes document that will highlight the exact nature of the changes and their location.

Important Registration Deadlines

The closing date for assessments to be registered under the April 2008 version of the Code will be Sunday 2nd November 2008. Only those assessments with contractual/funding requirements dependent on an assessment under the April 2008 version of the Code will be accepted following this date.

Announcing a How to Guide for Code for Sustainable Homes Assessors

The Code team at BRE Global have been busy working on a How to Guide for Code assessors.

What does the How to Guide cover?

This How to Guide takes an assessor through the whole process of an assessment, from receiving an enquiry to final certification. It includes hints and tips on what to look out for in each section.

Who is this guide for?

All BRE Global Code Assessors. This guide has been written with all Code organisations in mind from large organisations but also to support smaller, independent assessors.

When will it be released and where can I find it?

The How to Guide is soon to be released and will be housed on the Code Assessor Extranet

Please let us know what you think

We would like this Guide to be as helpful as possible so would appreciate any feedback you have on what you would like to be included in this document. Please send your comments to csh@bre.co.uk

Code for Sustainable Homes – Hea 4 - Lifetime Homes

We have recently received a number of technical queries questioning the flexibility of the Lifetime Homes scheme in the Code for Sustainable Homes. Consequently, we have contacted Habinteg (official advisors of Lifetime Homes), who have clarified the situation.

The dimensions stated in the Code for Sustainable Homes technical guidance are non-negotiable, and as such, if these are not met, the credits should be withheld. All dimensions have been determined to ensure that the dwelling provides sufficient flexibility to accommodate a range of occupants with or without restricted mobility.

Checklist Hea 4 - Lifetime Homes (pages 220 – 224) in the 2008 Code for Sustainable Homes technical guide document indicates the applicable criteria.

Habinteg have also supplied further information, additional guidance notes, and diagrams for each Lifetime Homes Standard; this is available at www.lifetimehomes.org.uk/codeassessors



Correction to July Process Note - The use of SAP 2005 for EcoHomes 2005/2003 assessments

This information supersedes the information in the article 'The use of SAP 2005 for EcoHomes 2005/2003 assessments' which was published in the July Process Note

It has come to our attention that information published in the July Process Note was not complete. We have reviewed the information published and further information has been provided to ensure the correct SAP references are used, as shown below. **Please note the comments indicated within the tables below.**

After further comparison of the 2001 and 2005 SAP methodologies, we can confirm that it is acceptable to use SAP 2005 for an EcoHomes 2005 assessment, as an alternative to SAP 2001. This applies to schemes being built to 2006 Part L requirements which require SAP 2005 worksheets for building regulation compliance. Other schemes being built to 2002 regulations can continue to use SAP 2001 as normal for an EcoHomes 2005 assessment.

When using SAP 2005 for an EcoHomes 2005 assessment, the EcoHomes 2005 Calculation of CO₂ Emissions methodology for Ene1 and Ene2 must continue to be followed; please note: the DER from SAP 2005 cannot be used as a value for Total CO₂ Emissions due to difference in emissions factors used in the EcoHomes 2005 methodology and SAP 2005 methodology. Assessors must use the EcoHomes 2005 Ene1 calculator tool to calculate the CO₂ emissions using the relevant values taken from SAP 2005.

The Ene 1 calculator indicates the relevant SAP box numbers for these values. **Please use the tables below to ensure the values from the correct SAP boxes are used.** These values are quoted in kWh/year in SAP2005 which must be divided by 277.8 to convert to GJ/year as is used for EcoHomes 2005. Ene 2 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 EcoHomes 2005 rather than the HLP as is used in EcoHomes 2006 and the Code.

The Tables below indicate the appropriate SAP boxes that values should be taken from when using SAP 2005 in place of SAP 2001.

Individual systems		
Energy For	SAP2001	SAP2005
Water Heating	51	86a
Space heating (primary)	85	85
Space Heating (secondary)	86	85a
Pumps and Fans	87	87
Communal systems - ref BRE for CHP		
Energy For	SAP2001	SAP2005
Water Heating	51	87a* or 87b* [1]
Space heating (primary)	86 + 87*	86* + 87* [2]
Space Heating (secondary)	N/A	N/A
Pumps and Fans	88*	88*

Comment:

[1] SAP 2001 figure is in GJ/yr where as SAP 2005 is in kWh/yr (kWh = GJ *277.8).

[2] 87*(which relates to the average boiler efficiency) and 86* (which relates to the CHP efficiency) need to be added (if there is no CHP then no figure will be contained within field 86*, so zero will be added).



Code for Sustainable Homes: Mat 2 – British Gypsum

In the April 2008 version of the Code Technical Guidance a reference was included to a 'Statement of Intent from British Gypsum' to clarify the status of this document in relation to Credit Mat 2 - Responsible Sourcing of Materials - Basic Building Elements. The statement was not intended to discriminate against British Gypsum as a company or to reflect in any way the quality of their products or services. It was included following receipt of a significant number of specific queries regarding its impact on the awarding of credits. We offer our apologies to British Gypsum for any inconvenience that this reference may have caused to them.

Whilst we are not aware of similar statements from other manufacturers, we can confirm that no 'Statement of Intent' document can be accepted as evidence of compliance under this credit which requires systems to be in place.

To clarify this, the following changes will be made in the October 2008 version of the guidance.

Pg 135, Common cases of non-compliance.

Delete: 'The statement of intent from British Gypsum does not comply with the requirements stated within the Technical Guidance.'

Insert: 'A statement of intent from a product manufacturer and/or supplier does not meet the requirements for this issue.'

Pg 143, Common cases of non-compliance.

Insert: 'A statement of intent from a product manufacturer and/or supplier does not meet the requirements for this issue.'

BREEAM Multi-residential and the Code

From 1st May 2008, it became compulsory for every new build self-contained home that is marketed for sale in England to have a rating against the Code for Sustainable Homes (Code) and for information on this rating to be provided to prospective home buyers through the Home Information Pack (HIP). The HIP requirements mean that any class 2 sheltered housing or other multi-residential buildings, where occupants reside within self contained dwellings, must be rated under the Code for Sustainable Homes.

As a result we are withdrawing BREEAM Multi-residential for self-contained homes in multi-residential buildings. Projects that have already been registered under BREEAM Multi-residential and which comprise self-contained dwellings can still be assessed under that method. There is no requirement to re-register them under the Code, but it should be noted that the HIP regulations may (if a Building Notification was received by the Local Authority Building Control on or after 1st May) still require the inclusion of a rating against the Code. In this case, a developer would need to include the nil-rated Code certificate for those dwellings but may like to include, as a voluntary document, the BREEAM Multi-residential certificate.

We recognise that there may be assessments underway which have not yet been registered under BREEAM Multi-residential. Whilst we strongly recommend early registration of assessments, we will continue to accept registrations against this method until 10th October, to allow the assessment of such buildings to continue as planned. Current registration requirements will continue and all applications should be accompanied by plans.

After this period, BREEAM Multi-residential assessments will no longer be available for buildings containing self-contained dwellings as these can be assessed against the Code for Sustainable Homes. Further details relating to these changes and information, as well as guidance regarding the scope of BREEAM Multi-residential, can be found on the assessor extranet. This also includes details of an updated registration process.



BREEAM Multi-residential 2008 Update

BREEAM Multi-residential was last updated in 2006 and we are in the process of updating the BREEAM Multi-residential scheme to the 2008 version. This update will be introduced at the end of October 2008 to go live at the end of November 2008. The focus of this update is to provide further clarifications and to bring BREEAM Multi-residential in line with new legislation, the Code for Sustainable Homes and the BREEAM 2008 update.

In summary, the main changes and additions to BREEAM Multi-residential that will come into effect are as follows:

- Update the credit requirements in line with BREEAM 2008 and the Code for Sustainable Homes
- Update the environmental section weightings to bring them in line with BREEAM 2008
- Review the Multi-residential specific credits such as cycle storage, recycling facilities, internal potable water use, local amenities to take into account of assessor feedback, new legislation, best practice and emerging technologies
- The introduction of an 'Outstanding' rating as BREEAM 2008
- The introduction of minimum BREEAM standards for each rating level and innovation credits as in BREEAM 2008
- Post Construction Review is to become a formal part of the certification process as with other BREEAM 2008 schemes
- To integrate the Code within BREEAM Multi-residential to allow multi-residential buildings with self-contained dwellings to be assessed under the Code and to also have a whole building certificate covering the communal facilities through the BREEAM Multi-residential assessment process.*

* Note: this change is to be confirmed and is at feasibility stage at the moment.

Invoicing

Please note that for all BREEAM schemes and the Code for Sustainable Homes, invoices for Certification (QA) are processed for issue from the date of first submission of the Assessment Report.

BREEAM Prisons – Technical Revision

BREEAM Scheme/ Version	Document/Area affected	Technical Revision	Reason/Further Information
Prisons 2006	BREEAM Prisons Report Template 2006	The BREEAM Rating bands were incorrect; these have now been corrected.	Feedback from assessors



BREEAM 2008 - Assessment Manual Issue 2.0

All non-domestic BREEAM assessors please note that BRE Global have published a new issue of the BREEAM 2008 assessment manual for all UK standard schemes. The new issue (issue 2.0) contains amendments and additions to the credit compliance requirements and notes, and minor errors in the first issue have also been rectified. The new issue of each manual is now available from the Assessor's Extranet; each manual contains a 'Schedule of Changes' table (in the introduction) outlining in detail the alterations/additions made to each scheme. The publicly downloadable versions of the manuals (available via the BREEAM website) have also been updated accordingly. The new issue was published on 11th August 2008 and all BREEAM 2008 assessments, from that date onwards, must use issue 2.0 of the guidance.

BREEAM 2008 - Assessment Tools

In line with alterations/changes made to issue 1.0 of the BREEAM 2008 assessment manuals (as summarised above), BRE Global have revised and uploaded a new revision of the spreadsheet tool to the Assessor Extranet. The latest version of the spreadsheet tool is rev01 and this revision contains a worksheet outlining the changes made to rev00 of the tool. BRE Global also took this opportunity to amend the runtime errors that assessors were experiencing with rev00 of the tool - many thanks to those assessors who reported these errors. If assessors spot any future errors/problems with the tool please report them to BREEAMCustomerService@bre.co.uk

BREEAM 2008 - Calculator Tools

The seven individual BREEAM calculator tools are now available via the Assessor Extranet, including **Mat 1 Materials Specification**. Assessors will find calculator tools for the following BREEAM issues:

- Ene 1 Reduction of CO₂ emissions
- Tra 1 Provision of Public Transport
- Wat 1 Reduction of Water Consumption
- Mat 1 Materials Specification
- Mat 5 Responsible Sourcing of Materials
- Mat 6 Insulation
- LE4 and LE5 Mitigating Ecological Impact and Enhancing Site Ecology

BREEAM Europe 2008

The updated 2008 BREEAM Europe Retail, Offices and Industrial guidance is now complete and can be found on the BREEAM Assessor's Extranet under the BREEAM International folder. As you will have seen from a recent press release, we have been working with Toyota to develop BREEAM Europe Toyota retail units which is also now completed and can be found on the extranet. The guidance is accessible to BREEAM International and BREEAM Bespoke assessors. A registration form can also be found on the BREEAM assessor extranet which will allow assessors to register assessments. The spreadsheets and calculator tools will follow shortly. For more information on becoming a BREEAM International assessor, please visit our website <http://www.breeam.org/events.jsp>

BREEAM Healthcare: Department of Health's target for healthcare buildings that are partly new build and partly refurbished

If a building assessed is partly new build and partly refurbished, the target ratings set by the Department of Health are as follows:

- If the refurbished part accounts for less than 10% of the total floor area of the building assessed, the requirement from the Department of Health is to achieve an EXCELLENT rating using BREEAM.
- If the refurbished part accounts for 10% or more of the total floor area of the building assessed, the requirement is to achieve VERY GOOD.



BREEAM Bespoke Criteria Development - Technical Update 2008

Following feedback from Assessors, we will no longer be issuing the BREEAM Bespoke Assessor manual for each 2008 project as part of the criteria development. Instead the master BREEAM Bespoke 2008 Assessor manual is now available on the Extranet for Assessors to refer to.

To account for amendments to the standard criteria for each specific project, we will also produce a Bespoke Project Criteria Appendix sheet which details these amendments and this will be issued with the project specific spreadsheet. We anticipate that this will save Assessors time as they will not need to read through the whole Bespoke manual for each project to identify differences to the standard credits.

The BREEAM Bespoke 2008 spreadsheet determines the issues that should be assessed for each project and the credit applicability. The Assessor should review these issues in conjunction with the master BREEAM Bespoke 2008 manual available on the Assessor extranet and the Bespoke Project Criteria Appendix sheet issued for the project. For projects where an Assessor is not yet assigned, the master BREEAM Bespoke 2008 Assessor manual will be issued to the client with the BREEAM Bespoke 2008 spreadsheet for each project.

Bespoke BREEAM information update

A number of documents related to the Bespoke BREEAM scheme have been created/updated to reflect changes in the process of the scheme and as part of the 2008 BREEAM update.

Bespoke BREEAM information sheet – Available on the BREEAM website

General information is available for download from the BREEAM website. This is intended to provide the general public with general information on the Bespoke BREEAM process and may be useful to send to clients.

<http://www.breeam.org/page.jsp?id=14>

Bespoke BREEAM assessor process information document – available on the Bespoke BREEAM extranet for licensed assessors

The Bespoke BREEAM assessor process information document has been updated for the 2008 version of BREEAM and now also includes information on security sensitive projects.

Bespoke BREEAM scope document - available on the Bespoke BREEAM extranet for all assessors

- BREEAM guidance for assessors extranet (all BREEAM licensed assessors)

A scope of scheme document is now available outlining the scope of the Bespoke BREEAM scheme (this is similar in format to those for the standard schemes). This is intended to provide clarification on the types of buildings that can be assessed under the remit of the scheme, where scheme classification of a development is unclear. Please note when assessing the relevant of some mixed use developments the scope document should be consulted together with the relevant scope document for the standard scheme. These are freely available on the BREEAM website for download.

Bespoke BREEAM criteria development - information collection sheet – available on the BREEAM website

This document replaces the information collection email sent to assessors upon request of Bespoke BREEAM criteria. This form should be completed and submitted with appropriate plans/accommodation schedule to the BREEAM Office at BREEAM@bre.co.uk

This document is available for download at the following link:

<http://www.breeam.org/page.jsp?id=14>



BREEAM Education

Further Education assessments by BREEAM Bespoke assessors

The draft BREEAM Further Education (FE) developed by BRE Global and the Learning Skills Council is now a part of the BREEAM Education 2008 scheme. Bespoke assessors, who could previously use the draft FE version to complete BREEAM assessments of this building type, will not be able to assess FE buildings registered on or after 1st August 2008, unless formally trained and licensed in BREEAM Schools 2005/2006 or BREEAM Education 2008 (as previously announced).

To recognise the support that BREEAM Bespoke assessors have provided during the pilot phase of BREEAM Further Education, BRE Global will be offering some BREEAM Bespoke Assessors a 25%* discount on the BREEAM Education 2008 top-up day and test assessment fee.

*The discount can be claimed only by those BREEAM Bespoke assessors who have registered (before 1st August 2008) and assessed (or are in the process of assessing) at least **one** Further Education development using the draft BREEAM Further Education 2006 version.

Come and see the BREEAM Awards at 100% Detail

BRE is the 100% Detail conference partner. Come and visit us at 100% Detail where you can see the BREEAM Awards and attend free seminars on BREEAM.

The BREEAM Awards ceremony will take place on 18th September and will be complemented by a number of free seminars spanning the four days of the 100% Detail exhibition, focusing on BREEAM and exciting new developments including:

- An Introduction to BREEAM 2008 including information on new initiatives: BREEAM Energy Star, BREEAM Communities and BREEAM In-Use
- The Code for Sustainable Homes
- New schemes including BREEAM Healthcare and Education

The 2008 BREEAM Awards mark the third annual national ceremony of its kind, with a regional awards ceremony for Wales having taken place earlier this year. For further information on previous award winners please visit www.breeam.org or if you are interested in visiting the 100% Detail exhibition please visit www.100percentdetail.co.uk

UPCOMING BRE EVENTS

Water in a changing climate, 15th October 2008

<http://www.bre.co.uk/enews/waterevent/> - BRE, Watford

Future Communities Now, 29 September - 1 October 2008 - Latimer, Buckinghamshire

<http://www.futurecommunitiesnow.com/>