

# ASTDEA3

## Identify representative properties for sampling and multiple certification



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### Overview

This standard covers those activities that are required in order to decide which properties should be assessed as representative, in circumstances in which sampling and multiple certification is appropriate. This approach should not be used routinely and is only allowed in specific circumstances defined in legislation and in some administrations, further guidance. The identification of representative properties for inspection may be appropriate in specific circumstances e.g. within the social rented and/or private rented sector where a number of similar Units require Energy Performance Certificates.

Note that the term 'assessment' is used throughout the standards when referring to the overall process of determining the energy performance of a property, whereas 'inspection' is used only when referring to on-site inspection of the property and its features.

You are required to obtain relevant information relating to the properties in question from the owner or manager of the properties, evaluate its completeness and accuracy (including the necessary site inspections – see ASTDEA4), taking the appropriate action in cases where the required information is not forthcoming, is incomplete, has not been recently updated, or is found to be inaccurate. You must evaluate the information in order to determine which property or properties, if any, constitute representative properties for the purposes of assessing energy performance (where 'representative' is defined as that reflecting the characteristics or nature of the larger population and which would be expected to generate ratings and recommendations that are sufficiently similar).

Note that each Certificate is specific to an individual property and that the property may be a representative of another property, but there is no such thing as a representative Certificate that is applicable to a number of similar properties.

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#### Performance criteria

- You must be able to:*
- P1 explain the criteria for determining representative properties and how they may be applied in different circumstances
  - P2 request relevant **information** relating to the properties in question from the owner or manager of those properties
  - P3 take appropriate **action** where the required property information is not forthcoming, is incomplete or is inaccurate
  - P4 evaluate **information** relating to properties in order to determine their similarities and differences with regard to factors likely to affect energy performance, including testing the data on-site by means of test inspections on sample properties
  - P5 identify, from your evaluation of the **information and test inspections**, a property or number of properties that are representative for the purposes of assessing energy performance
  - P6 where it is not possible to identify any representative property or properties, record your rationale and explain the situation to the owner or manager of the properties
  - P7 justify your reasons for selecting specific representative properties in a clear and concise manner
  - P8 create and retain records and site notes for the sample properties inspected to support multiple certification and create and retain desk notes for the expansion to the cloned Energy Performance Certificates

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### Knowledge and understanding

*You need to know and understand:*

- K1 relevant guidance and advice relating to the identification of representative properties including the circumstances where this process is allowed
- K2 the range of information required relating to the properties in question and the potential sources of such information
- K3 the criteria for determining representative properties and how they can be applied in different circumstances
- K4 the action to take in cases where the required property information is not forthcoming, is incomplete or is inaccurate
- K5 the factors that affect the energy performance of buildings
- K6 how to evaluate information relating to properties in order to determine their similarities and differences with regard to the factors likely to affect their energy performance
- K7 the definition of a representative property
- K8 how to identify a property or number of properties that are representative for the purposes of assessing energy performance where a sampling approach is relevant
- K9 the potential consequences of choosing inappropriate property or properties
- K10 the importance of recording and communicating your reasons where it has not been possible to identify representative property or properties
- K11 the importance of being able to justify your reasons for selecting specific representative properties
- K12 the importance of testing the accuracy of the information on-site in order to confirm that it is appropriate to use the data
- K13 how assess the number of on-site tests to conduct to give confidence that the data may be used
- K14 the importance of records in justifying your process of multiple certification

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### Additional Information

#### Scope/range

#### 1 information

- 1.1 plans and specifications
- 1.2 logbooks
- 1.3 relating to the block or estate of which the property forms part, such as energy databases and housing stock databases, which may lead to the identification of representative properties for Energy Performance Certificate purposes
- 1.4 other relevant information relating to the characteristics of the properties

#### 2 action

- 2.1 explain consequences of failure to supply information (e.g. need to inspect all properties)
- 2.2 request information from other sources
- 2.3 undertaking sample inspections to test the accuracy of centrally-held data

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**Developed by** Asset Skills

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**Version number** 2

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**Date approved** February 2012

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**Indicative review date** February 2017

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**Validity** Current

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**Status** Original

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**Originating organisation** Asset Skills

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**Original URN** DEA3

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**Relevant occupations** Professional Occupations; Construction, Planning and the Built Env; Building and Construction; Architects, Town Planners and Surveyors

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**Suite** Domestic Energy Assessors

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**Key words** energy assessment; energy performance certificate; EPC; legislation; RDSAP; energy performance