

Overview

This standard covers those activities that are required to identify which properties should be assessed as representative, in circumstances in which sampling and multiple certification is relevant. This approach should only be used in circumstances defined in relevant legislation and in devolved nation's guidance. The identification of representative properties for inspection may be used within the social rented and/or private rented sector where a number of similar Units require Energy Performance Certificates.

The standard is about obtaining relevant information from the owner or manager of the properties, evaluating its completeness and, and 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 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 Energy Performance 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.

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 must understand and work to the requirements of each devolved nation.

Performance criteria

You must be able to:

1. explain to customers the devolved nation criteria for determining representative properties and how they are applied in eligible circumstances
2. request relevant information relating to the properties from the owner or manager of those properties
3. undertake relevant action where the required property information is not forthcoming, or does not meet the required devolved nation's standards
4. evaluate the relevant information relating to properties to determine their similarities and differences regarding factors that impact on energy performance
5. identify, from the evaluation of the information and test inspections, a property/ies that are representative for the purposes of assessing energy performance
6. record the rationale used in the required records, where it is not possible to identify the representative property/ies, explaining the situation to the owner or manager of the properties
7. justify the reasons for selecting the representative property/ies
8. create and retain records and site notes for the sample properties inspected to support multiple certification in accordance with the relevant data protection legislation
9. create and retain desk notes for the expansion to the cloned Energy Performance Certificates

Knowledge and understanding

You need to know and understand:

1. the relevant guidance and advice relating to the identification of representative properties including where properties are not eligible
2. the range of information required relating to the properties sources of such information
3. the relevant devolved nation's criteria for determining representative properties and how they are applied in in eligible circumstances
4. the action to take in cases where the required property information is not forthcoming, or does not meet the required devolved nation's standards
5. how to evaluate information relating to properties to determine their similarities and differences regarding the factors likely to impact on their energy performance
6. the definition of a representative property
7. how to identify a property/ies that are representative for the purposes of assessing energy performance where a sampling approach is relevant
8. the importance of recording and communicating reasons where it has not been possible to identify representative property or properties
9. the importance of being able to justify reasons for selecting specific representative properties to the owner or manager of the properties
10. the importance of keeping records to support the process of multiple certification in accordance with the relevant data protection requirements

Scope/range

Information:

- plans and specifications
- logbooks
- 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
- including testing the data on-site by means of test inspections on sample properties
- other relevant information relating to the characteristics of the properties

Action:

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

Developed by	Instructus
Version Number	1
Date Approved	March 2019
Indicative Review Date	January 2024
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	ASTDEA3
Relevant Occupations	Professional Occupations; Construction, planning and the built environment; Building and construction; Architects; Town Planners and Surveyors
Suite	Domestic Energy Assessors National Occupational Standards
Keywords	energy assessment; energy performance certificate; EPC; legislation; RDSAP; energy performance