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## Overview

This standard is about preparing for energy assessments of non-dwellings to produce Operational Ratings, Display Energy Certificates (DECs) and Advisory Reports. This includes taking instructions, clarifying requirements and making initial enquiries on matters relating to the property in question.

The standard includes making the required preparations for an on-site inspection, including obtaining available information about the property and its assessment, developing a fee proposal and preparing a preliminary Health and Safety Risk Assessment. It also includes agreeing and confirming instructions to undertake energy assessments and responding to requests from customers, clarifying their requirements, and checking that the property is eligible for a Display Energy Certificate energy assessment.

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

The references to customers throughout the standard refer both to internal customers, such as line managers, as well as external customers; for example, organisations who have contracted your services or representatives of external customer organisations.

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

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## Performance criteria

*You must be able to:* **Make the required preparations for an on-site inspection**

1. specify the tasks to be carried out prior to undertaking an energy assessment for a non-dwelling
2. identify available sources of existing information required to determine the physical and environmental factors that could affect the conduct of the energy assessment
3. explain to customers the importance of obtaining existing information to determine the physical and environmental factors that could affect the conduct of the energy assessment
4. obtain from customers all available information that could affect the conduct of the energy assessment
5. evaluate the available information identifying inconsistencies and factors that may impact on the conduct of the energy assessment
6. prepare a preliminary Health and Safety Risk Assessment
7. identify the relevant cost drivers for the energy assessment and develop a fee proposal based on these

## **Agree and confirm instructions to undertake energy assessments**

1. respond to requests from customers to undertake energy assessments for non-dwellings
2. determine and explain whether the building requires a Display Energy Certificate or Advisory Report
3. clarify and confirm the customer's requirements and the scope of the instructions to ensure that the required information is available
4. confirm with customers the information which is required prior to and during the site inspection to prepare a Display Energy Certificate or Advisory Report
5. explain to customers, sources of information for the preparation of a Display Energy Certificate or Advisory Report, including previous certificates or reports
6. agree in writing with customers the terms and conditions, fee structure and payment arrangements for the contract, including the need to take photographs and record other evidence for audit purposes
7. explain to customers the limitations and constraints of the planned energy assessment

8. confirm with customers the on-site arrangements and access requirements for conducting the site inspection
9. explain to customers the requirements of relevant Building Regulations and the overall purposes of the Display Energy Certificate
10. identify any circumstances that prevent carrying out an energy assessment and explain the reasons to customers politely and clearly
11. select the relevant approved software, ensuring that the most up-to-date version and associated reference materials can be accessed
12. store records securely in accordance with the relevant data protection legislation

## Knowledge and understanding

*You need to know and understand:* **Make the required preparations for an on-site inspection**

1. the relevant Energy Performance of Buildings Regulations
2. the relationship between the Energy Performance of Buildings Regulations and the Energy Performance of Buildings Directive
3. which buildings are and are not required to have Display Energy Certificates and Advice Reports under these regulations and how to deal with voluntary certification
4. the limited circumstances when a site visit inspection might not be required
5. the format, content, frequency and validity of Display Energy Certificates and Advice Reports
6. the data and other information required in order to produce a Display Energy Certificate and Advisory Report
7. the approved software for the preparation of Display Energy Certificates and Advice Reports and the principles of their operation
8. the relevant national register of Display Energy Certificates and Advice Reports
9. the tasks to undertake prior to undertaking an energy assessment of a non-dwelling
10. the relevant geographical or environmental features that may affect the energy performance of the property
11. how to prepare a preliminary Health and Safety Risk Assessment
12. how to identify the relevant cost drivers for the energy assessment and how to develop a fee proposal based on these

### **Agree and confirm instructions to undertake energy assessments**

1. how to clarify and confirm customers' requirements and the scope of the instructions so that the required information is available
2. the sources of information, including previous certificates or reports, required for the preparation of Display Energy Certificates and Advice Reports
3. how to explain the information sources to customers and confirm the information that they will provide prior to and during the site inspection

4. how to identify and explain to customers the circumstances that prevent an energy assessment being carried out
5. the importance of explaining and confirming in writing the arrangements agreed between you and customers
6. the importance of explaining the terms and conditions, fee structures and payment arrangements for energy assessments
7. how to confirm on-site inspection arrangements with the customer or occupier
8. the circumstances that may prevent you from undertaking an energy assessment and the importance of explaining the reasons to customers
9. the relevant regulations governing energy assessment and the overall purposes of the Display Energy Certificate

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## Scope/range

### Significant factors:

- gaps in information concerning the building and its energy use
- health and safety considerations
- accessibility
- Customers:
- internal
- external

### Circumstances:

- properties beyond own current level of competence
- own diary pressures
- difficulties in gaining access
- conflicts of interest
- lack of key information

### On-site arrangements:

- access to the property
- those present at the property at the time of on-site inspection
- health and safety issues

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Prepare for energy assessments to produce Operational Ratings,  
Display Energy Certificates and Advisory Reports for non-dwellings



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