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## Overview

This standard is about undertaking energy assessments of existing Level 5 non-dwellings to determine energy performance, recommend energy efficiency measures and issue Energy Performance Certificates in compliance with the relevant devolved nation's regulatory requirements.

This standard relates to existing Level 5 non-dwellings that require the use of a Dynamic Simulation Model (DSM). It is about the assessment of existing Level 5 non-dwellings to determine energy performance including the collation of information from the on-site inspection and other sources to assess the energy performance of the property. It also covers the preparation and issue of an Energy Performance Certificate which includes energy efficiency measures for the property and meets relevant regulations and keeping adequate records of energy inspections carried out.

Note that the term 'assessment' is used throughout the standards when referring to the overall process of determining the Asset Rating of a property, or its Operational Rating, 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, individuals who have contracted your services or representatives of external customer organisations.

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

## Performance criteria

You must be able to:

### **Inspect existing Level 5 non-dwellings to determine energy performance**

1. identify the equipment and resources required for undertaking energy assessments of existing Level 5 non-dwellings using the Dynamic Simulation Model (DSM)
2. provide evidence of your identity to those present at the property before commencing the inspection
3. use the relevant surveying equipment and interpret the data generated by it
4. identify and record the method of construction of the property and the main materials used
5. identify circumstances when at the property that prevent continuing with the inspection and explain the reasons to the customer
6. undertake a visual inspection of the relevant aspects of the property in accordance with the requirements of the Dynamic Simulation Model (DSM) approved software
7. observe and take measurements which are required to provide data for the calculation of an energy performance rating
8. obtain the required additional information about the property
9. undertake further investigations where your observations are inconsistent with existing evidence and expected findings
10. follow the approved Dynamic Simulation Model (DSM) procedures for collecting information to enable the energy efficiency of the property to be determined

### **Produce Energy Performance Certificates**

1. assemble and collate information from on-site inspection and from other relevant additional sources
2. use the approved Energy Performance Certificate software, following the developer's instructions, to determine energy performance ratings confirming that data is entered to the required standards
3. use the approved Energy Performance Certificate software to generate recommendations for measures to improve the energy performance of the property
4. confirm the recommendations generated and make required amendments
5. delete recommendations that will not improve the energy performance of the property, providing your reasons within the approved software
6. prepare and issue an Energy Performance Certificate and recommendations for cost-effective improvement that meets the relevant devolved nation's codes of practice and standards
7. explain the Energy Performance Certificate and recommendations

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- for cost- effective improvement to the customer
  - 8. check the data is complete before finalising the Energy Performance Certificate
  - 9. maintain electronic internal records which conform to relevant professional and statutory requirements and data protection legislation

## Knowledge and understanding

### You need to know and understand:

#### **Inspect existing Level 5 non-dwellings to determine energy performance**

1. the equipment and resources required for undertaking energy assessments of existing Level 5 non-dwellings using the Simplified Building Energy Model (SBEM)
2. the relevant detailed inspection requirements and conventions that apply to the property as defined by the Simplified Building Energy Model (SBEM) approved software
3. the relevant definitions and conventions that apply to the Simplified Building Energy Model (SBEM) approved software
4. how to recognise different types of building construction, materials and services from drawings as well as buildings
5. how to identify and classify variations in building use
6. how to conduct the inspection in accordance with the relevant devolved nation's requirements
7. the problems that can affect the energy performance of the building fabric
8. how to observe and take measurements which meet the required standards
9. how to make further investigations where observations are inconsistent with existing evidence and how to identify the causes of these inconsistencies
10. how to collate information required to assess the energy performance of property

#### **Produce Energy Performance Certificates**

1. the relevant devolved nation's format and content of Energy Performance Certificates
2. the range of measures to improve the energy performance of property to be included within an Energy Performance Certificate
3. the relevant devolved nation's Energy Performance Certificate software used to produce Energy Performance Certificates and recommendations for cost-effective improvement
4. the principles underpinning the relevant devolved nation's Energy Performance Certificate software used to calculate energy ratings
5. how to input data in the relevant approved software to determine energy performance ratings
6. how to use the relevant devolved nation's Energy Performance Certificate software to generate recommendations for measures to improve the energy performance of property
7. the importance of checking that data has been entered to the relevant devolved nation's Energy Performance Certificate standards and how to review data if the calculation will not process
8. the importance of checking the recommendations generated,

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- deleting those that will not improve the energy performance of the property, and providing reasons within the approved software
  - 9. the way in which recommendations are generated and circumstances when it is relevant to delete them
  - 10. the importance of complying with the relevant data protection legislation
  - 11. the importance of checking the Energy Performance Certificate to confirm that it meets the relevant devolved nation's codes of practice and standards

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## Scope/range

### Level 5:

- a building identified as Level 5 according to the Assessment Level Decision Flow Chart as defined in Conventions published by the Department of Communities and Local Government's Commercial EPC Conventions Group

### Circumstances:

- the discovery of unexpected or hazardous conditions or materials
- other potential threats to health and safety

### Critical property features and activities:

- allocation of the most appropriate activity to zones
- lighting
- choice of default HVAC in zones where none exists
- selection of HVAC efficiency and its allocation to the appropriate zone
- availability of daylight
- presence of Low and Zero Carbon Technologies

### Relevant information:

- legible site notes
- clear site sketches (plan, elevation) to give an adequate record of the inspection for audit purposes
- clear photographs containing mandated data (e.g. time and date) appropriately staged and annotated where necessary
- legibly completed survey forms
- records of web searches or other research
- any other information considered necessary to support decisions
- any other information required by Scheme Operating Requirements

Developed by	Skills CFA
Version Number	1
Date Approved	30 Mar 2019
Indicative Review Date	06 Jan 2024
Validity	Current
Status	Original
Originating Organisation	Instructus
Original URN	ASTNDEA7
Relevant Occupations	Architects, Building and Construction, Construction, Planning and the Built Environment, Professional Occupations, Town Planners and Surveyors
Suite	Energy Advisers, Non Domestic Energy Advisors
Keywords	recommendations; cost-effective improvement; energy performance certificate