

## **INSOR3**

### **Determine Operational Ratings and issue Display Energy Certificates for non-dwellings**



#### **Overview**

This standard is about determining Operational Ratings (ORs) for non-dwellings in order to produce the Display Energy Certificates (DECs) required for defined categories of public buildings. This standard is equally relevant to the provision of Display Energy Certificates on a voluntary basis, where the skills, knowledge and outputs will be identical.

The standard is about calculating Operational Ratings, producing and issuing Display Energy Certificates, lodging them on the National Register or equivalent in the Devolved Administrations and communicating this to customers. It is about processing data to calculate Operational Ratings for non-dwellings, preparing and issuing Display Energy Certificates and communicating the Operational Rating and the contents of Display Energy Certificates to customers.

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 standards 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:

Process data to calculate Operational Ratings for non-dwellings

- identify the different categories of buildings, as described in the relevant devolved nation's guidance and Conventions and select the appropriate building benchmarks to use in the calculation of the Operational Rating
- select the relevant floor area measurement standard associated with the chosen benchmark category
- import and export data files using the relevant devolved nation's approved software so that previous years' data files can be downloaded from the relevant National Register
- choose an energy measurement period that is within the relevant devolved nation's prescribed tolerances and alignment
- determine, from invoices and records, energy consumption figures, in units
- apply occupancy corrections to benchmark data
- undertake an estimate of building air conditioning system output
- use the relevant devolved nation's approved systems to update the Central Information Point (CIP) file in approved software
- use the relevant devolved nation's approved software to calculate and determine Operational Ratings
- take action where 12-month energy data is not available, or where the requirements for measurement period tolerance and alignment cannot be met, in accordance with the relevant methodology and conventions
- process data in accordance with the relevant data protection legislation

Prepare Display Energy Certificates

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- obtain the previous year's Asset Rating and operational energy performance data from the relevant National Register
- use the relevant devolved nation's approved software to generate the Display Energy Certificate and the Technical Table
- investigate and explain changes between current data and previous Operational Ratings
- prepare Display Energy Certificates in line with the relevant devolved nation's approved methodology and Conventions
- produce, maintain and retain internal records in accordance with the relevant professional requirements and data protection legislation

Issue Display Energy Certificates

- use the relevant devolved nation's approved software to generate the data file for lodgement
- lodge Display Energy Certificates onto the relevant National Register
- retrieve Display Energy Certificates from the relevant National Register and issue and present them to customers

Communicate the Operating Rating and contents of the Display Energy Certificate to customers

- advise customers on fulfilling their responsibilities under the Energy Performance of Buildings Directive (EPBD) regulations for exhibiting and updating Display Energy Certificates and the enforcement procedures for non-conformity
- explain to customers the Operational Rating calculation and the importance of the various factors used in the calculation
- explain the information presented in the Display Energy Certificate and the Technical Table to customers and answer their questions

## **Knowledge and understanding**

You need to know and understand:

Process data to calculate Operational Ratings for non-dwellings

- the different categories of buildings as described in the relevant devolved nation's guidance and Conventions
- how to select the appropriate building benchmark to use in the calculation of the Operational Rating
- how to import and export data files between the relevant devolved nation's approved software and the National Register
- the prescribed tolerances and alignment for energy measurement periods
- the units for energy consumption that are used in Operational Rating calculations
- how CO2 emissions are derived from energy consumption data
- how to undertake a simple estimate of building air conditioning system output
- the function of the Central Information Point (CIP) file, why it must be regularly updated and how this is done
- the action to take where the 12-month energy data is not available or does not meet the requirements for measurement periods tolerance and alignment
- how to process data in accordance with the relevant data protection legislation

Prepare Display Energy Certificates

- the relevant devolved nation's prescribed format and contents of Display Energy Certificates
- how to obtain Asset Ratings and previous years' operational energy performance data from the relevant devolved nation's National Register
- how to use the relevant devolved nation's approved software to generate the Display Energy Certificate and the Technical Table
- how to investigate changes between current data and previous Operational Ratings
- the importance of checking the Display Energy Certificate to confirm that it conforms to the relevant professional requirements

Issue Display Energy Certificates

- how to use the relevant devolved nation's approved software to generate the data file for lodgement
- the relevant devolved nation's procedures for accrediting Energy Assessors in order that they may produce valid Display Energy Certificates
- how an Energy Assessor's accreditation status is confirmed when producing a valid data file for lodgement
- how Display Energy Certificates are lodged on and retrieved from the relevant devolved nation's National Register

Communicate the Operational Rating and contents of the Display Energy Certificate to customers

- the responsibility of customers under the Energy Performance of Buildings Directive Regulations for handling, exhibiting and updating Display Energy Certificates

- the current requirements for the implementation of the Energy Performance of Buildings Directive Regulations regarding Operational Ratings and Display Energy Certificates
- the quality assurance process for the approval of Display Energy Certificates
- how the Operational Rating is calculated and the importance of the various factors that contribute to it and how to explain this to customers
- how to explain the information presented in the Display Energy Certificate and Technical Table to customers, and answer their questions

**Developed by**

Skills CFA

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1

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Current

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Original

**Originating Organisation**

Instructus

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ASTOR4

**Relevant Occupations**

Architects, Building and Construction, Construction, Planning and the Built Environment, Professional Occupations, Town Planners and Surveyors

**Suite**

Energy Assessment & Advice

**Keywords**

energy performance of buildings directive; EPBD; energy performance certificate; EPC; display energy certificate; DEC; operational rating, OR, advisory report; AR