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HBF SAP: The Way Forward

The following recommendations arise from a meeting between representatives of the Home Builders Federation and three of the newbuild EPC Accreditation schemes held on 17th November 2011. The aim of the meeting was to explore ways in which the SAP assessment methodology, software and assessment processes could be ongoingly improved. The following is a list of suggestions for how we believe that such improvement can be achieved.

The Home Builders Federation will issue a further document to sit alongside these joint recommendations, which will detail HBF's own specific concerns surrounding the SAP and Part L process. This second report will be from a HBF perspective and will therefore sit outside of the suggestions made here.

1. The management of the SAP / Part L revisions process needs urgent review. A forward plan is required that allows sufficient time for proposed changes to be consulted upon and published in their final form. Once timelines are published they should be strictly adhered to, which at present fails to be the case with the current Part L and the SAP consultation being pushed back into 2012.
2. Currently, SAP development is carried out by BRE (the current SAP contractor for DECC) with very little involvement from key stakeholders. A SAP forum / consultative group should be set up to consider proposed improvements to SAP; this group should meet on an ongoing basis (e.g. quarterly) to help formulate a long term plan for evolving SAP and Part L calculation methodologies. It would introduce an essential feedback loop into the process. This would help avoid the situation where the only industry involvement is a 3 month consultation period every 3 years
3. Once the SAP / Part L methodology has been published and implemented in software, there should be no further amendments to the calculation procedures until the next change to Part L; the only exceptions to this should (a) be the addition of additional technologies that cannot be modelled in SAP other than via Appendix Q and (b) the correction of any implementation errors within specific SAP software.
4. The data sources and assumptions made in defining the SAP calculation are not currently freely available. These assumptions should be published so that product manufacturers and others can if appropriate challenge them and / or suggest improvements. For example, these could be published on the SAP website, currently <http://www.bre.co.uk/sap2009> or other to be agreed.
5. The current system of SAP software being produced by multiple providers and centrally approved by the DECC SAP contractor appears cumbersome. However, it leads to continual improvement of software due to it being a competitive market. It also helps to maintain a body of SAP expertise outside of the SAP contractor that contributes to the further development of SAP and via the approvals process identifies bugs in the SAP contractor's own implementation of SAP. This is in stark contrast to the situation regarding commercial buildings where the expertise is concentrated within the BRE and the software development process is more problematic.

6. The key issue identified in a recent HBF comparison of results from various software packages was that different Assessors interpreted the data to be entered to SAP differently, leading to different DER results. Once, these differences were corrected there was very little difference in the resulting DER values. Those differences that did exist were associated with errors in software that were quickly corrected in subsequent software releases. This suggests that the current infrastructure works but could be further improved.
7. The SAP Conventions published by DCLG for adoption by all EPC Accreditation schemes have initiated the process of bringing clarity and consistency to the SAP assessment process. This process should be further refined to bring onboard the practical experience of key stakeholders such as housebuilders, building control and EPC qualification awarding bodies. This would also increase the likelihood that these conventions are applied in practice.
8. There is scope for further improving the DCLG QA process for EPCs and Part L assessments. Firstly, the auditors of EPC schemes should check rigorously that EPC Accreditation schemes are ensuring that QA checks of SAP assessors adhere to the latest conventions. Secondly, there is a fundamental flaw in the QA process. At present the only QA checks carried out on SAP assessors occur once an EPC is lodged. Unfortunately what this means is that an assessor may have carried out a number of SAP assessments for a developer before the audit picks up any errors. Therefore a developer will be progressing with construction with the potential for an incorrect DER being used to formulate the specification. We propose that the audit process be amended so that a proportion of the QA checks be carried out at the Design stage, and a proportion carried out at the As Built stage. The total percentage of audits carried out could stay the same in order to avoid increased QA costs.
9. The process of getting new products approved for use in SAP via Appendix Q is currently laborious and expensive, in particular for small companies. Nevertheless it is accepted that a rigorous procedure is required to ensure that unfounded claims are not being made for new technologies. We suggest that a clearer procedure is developed and published stating how products can get approval. Organisations other than the BRE should have the ability to carry out testing as long as they first agree the procedure with the BRE or whoever is running Appendix Q.

About HBF

The Home Builders Federation (HBF) is the representative body of the home building industry in England and Wales. The HBF's 300 member firms account for some 80% of all new homes built in England and Wales in any one year, and include companies of all sizes, ranging from multi-national, household names through regionally based businesses to small local companies.



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