
DDA Limited

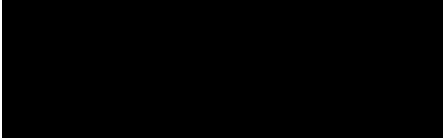
Lidl, Stoneham

BREEAM Pre-Assessment Report

18th August 2022



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Contents Page

	Page
1.0 Introduction	3
2.0 BREEAM New Construction 2018 Methodology	5
3.0 Review and Options	9

Appendices

Appendix 1	-	Credit Summary
Appendix 2	-	Design Stage Evidence Tracker
Appendix 3	-	BREEAM 2018 New Construction Key RIBA Stage Requirements

1.0 Introduction

1.1 Purpose of the Report

Focus Consultants were instructed by Stephen Ogden of DDA Limited to undertake a BREEAM evaluation of the proposed Lidl located in Eastleigh.

This initial overview and report has been commissioned to evaluate the scheme for compliance with BREEAM methodology and is based upon a meeting held on the 12th July 2022, at which a review of the relevant BREEAM credits was undertaken.

1.2 Key Aims

The report has three key purposes:

1. Following a BREEAM review meeting, assess the correct BREEAM methodology for the scheme.
2. Review the scheme against each of the BREEAM credits and confirm the possible score which could be achieved.
3. Highlight what will be required of the project team based upon the agreed strategy.

The report comprises two sections; the first covers a brief overview of the scheme, and a summary of the BREEAM score achieved, based on an indicative review. The second is a detailed evidence schedule, found in Appendix 1, confirming the individual credit requirements and evidence required for each of the credits targeted for the development.

Where appropriate, assumptions have been stated and recommendations are provided for ways in which the BREEAM ratings can be achieved or increased.

This report uses the following BRE documentation to support the assessment:

1. BREEAM New Construction 2018 version 3.0 produced by the BRE Limited
2. BREEAM Pre Assessment Tool provided by the BRE.

1.3 Required Standards

The BREEAM rating required is 'Excellent', which is equivalent to a score of 70%. However, this rating will only be achieved where the minimum standards set within BREEAM are met. Those relevant to this scheme can be found in the table below:

Table 1.0: Minimum Standards	
Credit	Criteria
MAN 03 - Responsible Construction Practices	Achieve at least a score of 25 under the Considerate Constructors Scheme with at least five in each section.
MAN 04 - Commissioning and Handover	The preparation and execution of a commissioning and testing schedule must be undertaken.
MAN 04 - Commissioning and Handover	The criteria referring to the production of a Building User Guide must be met.
MAN 05 - Aftercare	Ensure that seasonal commissioning is carried out on the building.
ENE 01 - Reduction of Energy Use and Carbon Emissions	Achieve at least four credits. This requires an SBEM and BRUKL that gives an energy performance ratio of at least 0.375.
ENE 02 - Energy Monitoring	Using a BMS, ensure that building users can see where at least 90% of estimated annual energy consumption is being used.
WAT 01 - Water Consumption	At least one of the available credits must be achieved. This requires the overall water consumption rate of the building to be at least 12.5% better than a Building Regulations compliant building.
WAT 02 - Water Monitoring	Install a meter on the incoming mains water supply.
MAT 03 - Responsible Sourcing	All timber and timber-based products must be procured in line with the UK Government Timber Procurement Policy.
WST 03 - Operational Waste	Provide sufficient space for storing recyclable waste both internally and externally.

2.0 BREEAM UK New Construction 2018 Methodology

2.1 Methodology

This BREEAM assessment utilises a BREEAM UK New Construction 2018 online Pre-Assessment Tool to evaluate the building's performance under the 'Retail' criteria.

2.2 Environmental Sections

BREEAM UK New Construction 2018 is split into nine assessment sections or categories, stretching across a broad range of environmental issues, summarised in the table below.

Table 2.0: Assessment Categories	
Category	Objectives
Management	This category encourages the adoption of sustainable management practices in connection with design, construction, commissioning, handover and aftercare activities to ensure that robust sustainability objectives are set and implemented in the operation of the building.
Health & Wellbeing	This category encourages the increased comfort, health and safety of building occupants, visitors and others within the vicinity.
Energy	This category encourages the specification and design of energy efficient building solutions, systems and equipment that support the sustainable use of energy in the building and sustainable management in the building's operation.
Transport	This category encourages better access to sustainable means of transport for building users through alternative transport solutions and access to amenities to support reductions in car journeys.
Water	This category encourages sustainable water use in the operation of the building and its site by identifying means of reducing potable water consumption over the lifetime of the building and minimising losses through leakage.
Materials	This category encourages projects to focus on the procurement of materials that are sourced in a responsible way and have a low embodied impact over their life, including extraction, processing and manufacture and recycling.
Waste	This category encourages the sustainable management (and reuse where feasible) of construction and operational as well as waste through future maintenance and repairs associated with the building structure.
Land Use & Ecology	This category encourages sustainable land use, habitat protection and creation, and improvement of long-term biodiversity for the building's site and surrounding land.
Pollution	This category aims to reduce the building's impact on surrounding communities and environments arising from light-pollution, noise, flooding and emissions to air, land and water.

2.3 Assessment Process

The BREEAM assessment is split into two stages, with a Design Stage Assessment (DSA) carried out on the intentions of the project, and a final, Post Construction Review (PCR) carried out at project completion. Once the DSA has been compiled, submitted and interim certified, it will be necessary for the BREEAM Assessor to make a site inspection in order to view the as built specification for compliance. The PCR assessment will then be carried out, which will again be submitted and certified by the BRE, providing the final certified rating for the project.

For the purposes of the submission to the BRE, the assessor will ask the project team to provide supporting evidence. The supporting information is required in order to achieve the appropriate credits. The assessor will not be able to award credits without the necessary supporting documentation and evidence being provided.

Where the project is carrying out a Post Construction Stage (PCS) assessment only, it will still be necessary to provide the DSA supporting evidence required for a two-stage assessment, in order to confirm full compliance with the BREEAM criteria.

2.4 Weighting

Within this report credits are awarded throughout based upon the guidance manual. However, a weighting is applied to each credit within the final assessment tool. Therefore, the credit displayed against the issue is not always the actual value to the overall rating. The credit summary within Section 4.0 details the approximate credit weightings based on the BREEAM Pre-Assessment tool.

The BRE Scoring and Reporting Tool is used to accurately predict the final scheme rating. Please note that the BRE will change the assessment tools periodically and this can alter the individual assessment of credits and therefore the final rating.

2.5 RIBA Stage Requirements

The BREEAM assessment process requires a number of credit areas to have the required evidence in place, or as a minimum the requirements considered, by certain RIBA Plan of Work stages (or equivalent). The full list of credits affected is contained within Appendix 2; however, details of the credits affected and the evidence required by RIBA Stage 2 are noted in the following table, to assist the project design team with the urgent requirements for the upcoming work stage.

Table 3.0: RIBA Stage Critical Credits

	Assessment Criteria	Evidence Required
MAN 01 - Project Brief and Design	1. Stakeholder Consultation (project delivery). Prior to completion of the Concept Design, the project delivery stakeholders have met to identify and define their roles, responsibilities and contributions for each of the key phases of project delivery.	Meeting minutes/project directory or similar confirming the following team members have been appointed and their role on the project confirmed: Client Building occupier (where known) Design team Principal contractor or similar with construction management experience (e.g. construction project manager)
	4. Stakeholder Consultation (third party). Prior to completion of the Concept Design stage, all relevant third-party stakeholders have been consulted by the design team and this covers the minimum consultation content.	Consultation plan setting out the process and scope of the consultation (necessary for both design and post construction stages)
ENE 04 - Low Carbon Design	2. Passive Design Analysis. The project team carries out an analysis of the proposed building design/development to influence decisions made during Concept Design stage and identify opportunities for the implementation of passive design solutions that reduce demands for energy consuming building services.	Passive design analysis report
	7. Low Zero Carbon Feasibility Study. A feasibility study has been carried out by the completion of the Concept Design stage by an energy specialist to establish the most appropriate recognised local (on-site or near-site) low or zero carbon (LZC) energy source(s) for the building/development.	LZCT feasibility study report
MAT 06 - Material Efficiency	1. Opportunities have been identified, and appropriate measures investigated and implemented, to optimise the use of materials in building design, procurement, construction, maintenance and end of life.	Materials Efficiency report/statement. To be reviewed at the following RIBA stages (or equivalent): 1 - Preparation & brief 2 - Concept design 3 - Developed design 4 - Technical design 5 - Construction

Table 3.0: RIBA Stage Critical Credits

	Assessment Criteria	Evidence Required
WST 05 - Adaptation to Climate Change	1. Adaptation to Climate Change - Structural and Fabric Resilience. Conduct a climate change adaptation strategy appraisal for structural and fabric resilience by the end of Concept Design, in accordance with the following approach: a. Carry out a systematic (structural and fabric resilience specific) risk assessment to identify and evaluate the impact on the building over its projected life cycle from expected extreme weather conditions arising from climate change and, where feasible, mitigate these impacts. The assessment should cover the following stages: i. Hazard identification ii. Hazard assessment iii. Risk estimation iv. Risk evaluation v. Risk management.	Climate change adaptation strategy/report
WST 06 - Functional Adaptability	1. A building-specific functional adaptation strategy study has been undertaken by the client and design team by Concept Design, which includes recommendations for measures to be incorporated to facilitate future adaptation.	Functional adaptation strategy and implementation plan report for the design stage

3.0 Review and Options

3.1 Summary Score

Based upon the BREEAM pre assessment meeting held and the credit summary found in Appendix 1, the scheme achieves an anticipated score of 71.71% which equates to a rating of 'Excellent'. Additional optional credits have been provided within the next section for review where targeted credits may not be achieved.

3.2 Optional Credits

Recommendations where possible are provided for improvement within each of the criteria under BREEAM assessment, detailed within the Evidence Tracker section of the report. Should the project team feel a credit targeted within the credit summary cannot be achieved, or wish to look at alternatives/credits to increase the score or rating, the table below details credits that could be considered for inclusion within the assessment.

Table 4.0: Optional Credits	
Credit	Comment
TRA 02 Sustainable Transport Measures	Two additional credits could be achieved if 10% of car parking spaces are active electric charging points and 5% of spaces are reserved for car share participants.



Appendix 1

Credit Summary



CLIENT:	DDA Ltd
PROJECT:	Lidl, Stoneham
DATE:	18.08.2022
REVISION:	2

Credit Issue		Credits Available	Credits Sought	Section Total	Total Available for Section	Approx Weighted Value of Each Credit	Contribution to Final Score (%)
MANAGEMENT							
MAN 01	Project Brief and Design	4	2	17	21	0.52	8.90
MAN 02	Life Cycle Cost and Service Life Planning	4	2				
MAN 03	Responsible Construction Practices	6	6				
MAN 04	Commissioning and Handover	4	4				
MAN 05	Aftercare	3	3				
HEALTH AND WELLBEING							
HEA 01	Visual Comfort	5	2	11	19	0.78	8.55
HEA 02	Indoor Air Quality	5	2				
HEA 04	Thermal Comfort	3	3				
HEA 05	Acoustic Performance	3	3				
HEA 06	Security	1	0				
HEA 07	Safe & Healthy Surroundings	2	1				
ENERGY							
ENE 01	Reduction of CO ₂ Emissions and Energy Use	13	8	16	23	0.70	11.13
ENE 02	Energy Monitoring	2	2				
ENE 03	External Lighting	1	1				
ENE 04	Low Carbon Design	3	3				
ENE 05	Energy Efficient Cold Storage	2	0				
ENE 06	Energy Efficient Transportation Systems	N/A	N/A				
ENE 07	Energy Efficient Laboratory Systems	N/A	N/A				
ENE 08	Energy Efficient Equipment	2	2				
TRANSPORT							
TRA 01	Transport Assessment & Travel Plan	2	2	8	12	0.83	6.66
TRA 02	Sustainable Transport Measures	10	6				
WATER							
WAT 01	Water Consumption	5	3	7	9	0.78	5.44
WAT 02	Water Monitoring	1	1				
WAT 03	Water Leak Detection and Prevention	2	2				
WAT 04	Water Efficient Equipment	1	1				
MATERIALS							
MAT 01	Life Cycle Impacts	7	5	10	14	1.07	10.71
MAT 02	Environmental impacts from construction products - Environmental Product Declarations (EPD)	1	0				
MAT 03	Responsible Sourcing of Materials	4	3				
MAT 04	Insulation	N/A	N/A				
MAT 05	Designing for Durability & Resilience	1	1				
MAT 06	Material Efficiency	1	1				
WASTE							
WST 01	Construction Site Waste Management	4	3	8	9	0.67	5.33
WST 02	Use of Recycled & Sustainably Sourced Aggregates	1	1				
WST 03	Operational Waste	1	1				
WST 04	Speculative Floor and Ceiling Finishes	N/A	N/A				
WST 05	Adaptation to Climate Change	1	1				
WST 06	Functional Adaptability	2	2				



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Credit Issue		Credits Available	Credits Sought	Section Total	Total Available for Section	Approx Weighted Value of Each Credit	Contribution to Final Score (%)
LAND USE AND ECOLOGY							
LE 01	Site Selection	2	0	8	13	1.00	8.00
LE 02	Ecological Risks & Opportunities	2	2				
LE 03	Managing Negative Impacts on Ecology	3	2				
LE 04	Enhancing Site Ecology	4	2				
LE 05	Long Term Impact Ecology Management & Maintenance	2	2				
POLLUTION							
POL 01	Impact of Refrigerants	3	0	9	12	0.67	6.00
POL 02	Local Air Quality	2	2				
POL 03	Flood & Surface Water Management	5	5				
POL 04	Reduction of Night Time Light Pollution	1	1				
POL 05	Reduction of Noise Pollution	1	1				
INNOVATION							
MAN 03	Responsible Construction Practices - CCS Exemplary	1	1	1	20	1.00	1.00
HEA 01	Visual Comfort - Daylighting	1	0				
HEA 02	Indoor Air Quality - VOC Specification	2	0				
HEA 06	Security	1	0				
ENE 01	Reduction of Carbon Emissions and Energy Use	5	0				
WAT 01	Water Consumption	1	0				
MAT 01	Materials Specification	3	0				
MAT 03	Responsible Sourcing of Materials	1	0				
WST 01	Construction Site Waste Management	1	0				
WST 02	Recycled Aggregates	1	0				
WST 05	Adaption to Climate Change	1	0				
LE 02	Ecological Risks & Opportunities	1	0				
LE 04	Enhancing Site Ecology	1	0				
PROJECTED BREEAM SCORE		71.71					



Appendix 2

Design Stage Evidence Tracker

BREEAM 2018 Design Stage Evidence Tracker

CLIENT:	DDA Ltd
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DATE:	18.08.2022
REVISION:	2

BREEAM Requirements

	%	BREEAM Rating
Target Rating	71.71	Excellent
Potential Rating	73.38	Excellent
Current Rating Achieved	0.00	Not Rated
Minimum Standards Met	Not Rated	



CREDIT	ACTION	EVIDENCE REQUIRED	MINIUMUM REQUIREMENT	CREDITS AVAILABLE	CREDITS TARGETED	CREDITS ACHIEVED	POTENTIAL CREDITS	COMMENTS
MANAGEMENT								
MAN 01	CLNT / PM	Meeting minutes or similar confirming project delivery stakeholders and roles identified during RIBA Stage 2 (or equivalent)	N/A	1	1	0	0	Meeting minutes (or equivalent) required to show that relevant members of the project team (developer, contractor, architect, M&E, engineer etc.) have determined their roles prior to Stage 2. Additional evidence required to demonstrate the changes that have been made to the project as a result of the consultation.
	CLNT / PM	Consultation plan setting out the process and scope of the consultation						
	CLNT / PM	Revised project brief/execution plan or similar detailing specific changes from stakeholder input						
	CLNT / PM	Updated consultation plan detailing third party stakeholders consulted prior to completion of RIBA Stage 2 (or equivalent)	N/A	1	1	0	0	Achieved where appropriate stakeholders were consulted with during design stage and feedback was incorporated into scheme. Independent Plan can be completed by project team member, however consultation
	CLNT / PM	Documentary evidence (e.g design drawings, specification etc) detailing stakeholder feedback has been incorporated						
		BREEAM AP/sustainability champion appointment letter	N/A	1	0	0	0	
		Meeting minutes/similar confirming BREEAM target for project						
		Design stage assessment report						
		Guidance criteria 8-10 are achieved	N/A	1	0	0	0	
		BREEAM AP/sustainability champion reports issued throughout key project stages						
MAN 02		Elemental life cycle cost plan	N/A	2	0	0	0	
	QS	Component level life cycle cost plan	N/A	1	1	0	0	
	QS	Formal letter confirming cost in £/m²	N/A	1	1	0	0	Confirmation of capital project cost per m2 required
MAN 03	CON	Design Stage specification/commitment confirming all site timber "legally harvested and traded timber"	MAN 03	N/A	Y	N	0	All site timber to be legally harvested and traded
	CON	Design Stage specification/commitment and/or EMS certificate (Healthcare NHS only: copy of EMS certificate is minimum requirement)	N/A	1	1	0	0	Copy of EMS certificate and details of pollution prevention policies required
	CON	Design Stage specification/commitment and/or copies of main contractor pollution prevention policy documents						
	AP	BREEAM AP/sustainability champion appointment letter						
	CLNT / PM	Contract documents confirming BREEAM target forms part of principal contractor's contract	N/A	1	1	0	0	
	CON	Design Stage specification completed Responsible Construction Management checklist target	EXCELLENT	2	2	0	0	
	CON	Exemplary Level Credit: Completed Responsible Construction Management checklist for all points	N/A	1	1	0	0	
	CON	Design Stage specification/commitment confirming individual appointed or will be appointed to monitor, record and report construction impacts	MAN 03	N/A	Y	N	0	A specific on site individual will need to be nominated to collect site data before either of the below credits can be achieved.
	CON	Design Stage specification/commitment confirming site energy will be monitored throughout construction phase	N/A	1	1	0	0	Measure and record energy and water usage of construction site activities to achieve credit.
	CON	Design Stage specification/commitment confirming site water will be monitored throughout construction phase						
	Focus	BREEAM assessment scoring & reporting tool						
	CON	Design Stage specification/commitment confirming site transport energy will be monitored throughout construction phase	N/A	1	1	0	0	Measure and record site transport to achieve credit.
	Focus	BREEAM assessment scoring & reporting tool						

BREEAM 2018 Design Stage Evidence Tracker

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BREEAM Requirements

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Target Rating	71.71	Excellent
Potential Rating	73.38	Excellent
Current Rating Achieved	0.00	Not Rated
Minimum Standards Met	Not Rated	



CREDIT	ACTION	EVIDENCE REQUIRED	MINIUMUM REQUIREMENT	CREDITS AVAILABLE	CREDITS TARGETED	CREDITS ACHIEVED	POTENTIAL CREDITS	COMMENTS
MAN 04	M&E	Design Stage specification/commitment confirming commissioning will be carried out in line with relevant Building Regulations, BSRIA and CIBSE guidelines; details of commissioning manager appointed to monitor commissioning procedures	VERY GOOD	1	1	0	0	Construction programme/ commissioning schedule and BREEAM DS specification confirming commissioning will be carried out
	CON	Project programme required confirming testing and commissioning has been appropriately accounted for						
		Guidance criteria 1 - 2 are achieved	N/A	1	1	0	0	
	CON	Design Stage specification/commitment confirming specialist commissioning manager is appointed during the design stage to review and provide input on commissioning procedures						
		Guidance criteria 1 - 2 are achieved	N/A	1	1	0	0	
	CON	Design Stage specification/commitment confirming commissioning of building fabric will be carried out, and any defects identified will be remediated						
	CON	Design Stage specification/commitment confirming a Building User Guide will be provided at handover and a traning schedule will be prepared for the building occupier/manager	VERY GOOD	1	1	0	0	Confirmation required that a Building User Guide and handover training schedule will be provided
MAN 05	CLNT	Design Stage specification/commitment confirming aftercare support and training will be provided, and energy/water consumption data will be collected for the first 12 months following completion	N/A	1	1	0	0	Verified BREEAM DS specification will complete all criteria
	CLNT	Design Stage specification/commitment confirming an appropriate level of seasonal commissioning will be carried out	EXCELLENT	1	1	0	0	
	CLNT	Design Stage specification/commitment confirming post occupancy evaluation will be carried out 12 months after completion	N/A	1	1	0	0	
		Exemplary Level Credit: Design Stage specification/commitment confirming energy/water consumption data and occupant satisfaction data will be monitored, targeted and reviewed quarterly for the first 3 years following completion; note: data to be issued to BRE annually	N/A	1	0	0	0	
Total Credits				23	18	0	0	
Total Credits (Weighted)			0.52	12.99	9.90	0.00	0.00	
HEALTH & WELLBEING								
HEA 01	ARC	Design drawings/plans confirming glare control measures	N/A	1	1	0	0	Drawings and commentary of how glare has been designed out required
	ARC	Specification confirming glare control measures						
		Daylight Calculations	N/A	2	0	0	0	
		Exemplary Level Credit: daylight calculations confirming additional criteria is met	N/A	1	0	0	0	
		Design drawings/plans confirming room dimensions in relevant areas	N/A	1	0	0	0	
		Window opening:wall area calcuations						
	M&E	Design Stage specification/commitment confirming internal and external lighting levels are in accordance with the relevant CIBSE Lighting Guides	N/A	1	1	0	0	Lighting to be specified in line with relevant CIBSE and BSRIA requirements
HEA 02	SUB	Copy of compliant Indoor Air Quality Plan	HEA 02	N/A	Y	N	0	Indoor air quality plan required to achieve credits
	CON	Ventilation strategy report	N/A	1	1	0	0	
	ARC	Design Stage mechanical services/ventilation drawings						
	CON	Design stage mechanical specification						
		Design Stage specification/commitment confirming relevant products meet maximum VOC content levels detailed within guidance requirements	N/A	2	0	0	0	
		Exemplary Level Credit: Design Stage specification/commitment confirming additional VOC content requirements will be met	N/A	1	0	0	0	
	CON	Design Stage specification/commitment confirming pre-occupancy VOC content testing will be carried out	N/A	1	1	0	0	
HEA 04	SUB	Compliant thermal model report	N/A	1	1	0	0	Thermal modelling to be commissioned
		Guidance criteria 1 - 4 are achieved	N/A	1	1	0	0	Thermal model report to confirm that predicted climate change environment risks will be mitigated
	SUB	Compliant thermal model report demonstrating additional criteria OR Confirmation that the building is designed to be easily adapted using passive design measures to meet the project climate change environment requirements						
		Guidance criteria 1 - 4 are achieved	N/A	1	1	0	0	
	M&E	Thermal zoning and control strategy report, based on thermal model analysis						

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BREEAM Requirements

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Target Rating	71.71	Excellent
Potential Rating	73.38	Excellent
Current Rating Achieved	0.00	Not Rated
Minimum Standards Met	Not Rated	



CREDIT	ACTION	EVIDENCE REQUIRED	MINIUMUM REQUIREMENT	CREDITS AVAILABLE	CREDITS TARGETED	CREDITS ACHIEVED	POTENTIAL CREDITS	COMMENTS
HEA 05	SUB	Design Stage specification/commitment detailing relevant performance standards will be met OR Acoustician's report	N/A	3	3	0	0	
HEA 06		Security Needs Assessment completed by end of RIBA Stage 2	N/A	1	0	0	0	
		Written confirmation (e.g. letter/meeting minutes) that recommendations from SNA will be implemented						
		Exemplary Level Credit: security rating scheme report confirming additional criteria is met	N/A	1	0	0	0	
HEA 07		Site plan detailing pedestrian and cyclist access routes	N/A	1	0	0	0	
		Design Stage specification/commitment confirming compliant lighting strategy in line with relevant British Standards						
	ARC	Site plan detailing amenity space	N/A	1	1	0	0	
Total Credits				21	11	0	0	
Total Credits (Weighted)			0.78	16.99	8.55	0.00	0.00	
ENERGY								
ENE 01	ENE	A copy of the Building Regulations Output Document from the approved software. The output documents must be based on the design stage of analysis.	EXCELLENT	9	8	0	0	Credits are predicted based upon potential SBEM performance
		(Multi residential only) A copy of the Building Regulations Output Document from the design stage SAP calculations						
		Design stage meeting minutes from preliminary design workshop on operational energy performance	OUTSTANDING	4	0	0	0	
		Design energy model and report with predicted operational energy consumption figures, including design assumptions input data reported						
		Completed risk assessment highlighting any significant design, technical, and process risks that should be monitored and managed throughout the construction and commissioning process.						
		Exemplary Level Credits: Post-occupancy stage: appointment documentation confirming funds have been committed to carrying out post occupancy evaluation of operational energy targets	N/A	2	0	0	0	
		Confirmation that full credits are achieved under ENE 02						
ENE 02	M&E	Design Stage specification/commitment confirming compliant sub-metering strategy	VERY GOOD	1	1	0	0	DS specification confirming sub-metering will be installed for relevant systems. If building over 1,000m2 then a BMS will be required
	M&E	Healthcare, office, HE/FE, Industrial, retail, Relevant 'other buildings' only Design Stage specification/commitment confirming compliant sub-metering strategy for tenancy or high-load areas	N/A	1	1	0	0	
ENE 03	M&E	Design Stage specification/commitment confirming compliant external lighting strategy	N/A	1	1	0	0	External lighting levels should be specified in line with guidance requirements
ENE 04		Hea 04 criteria 1 - 4 are achieved	N/A	1	1	0	0	
	M&E	Passive Design Analysis Report						
		Guidance criteria 1 - 3 are achieved	N/A	1	1	0	0	
	M&E	Passive Design Analysis Report report including free cooling review						
	CON	Design Stage specification/commitment confirming that the free cooling strategy will be adopted						
	M&E	LZCT feasibility study	N/A	1	1	0	0	
	CON	Design Stage specification/commitment confirming that the recommended LZCT will be installed						
ENE 05		Design Stage specification/commitment confirming refrigerant system is designed in accordance with the relevant standards	N/A	1	0	0	0	
		Guidance criteria 1 & 2 are achieved	N/A	1	0	0	0	
		Calculations confirming refrigerant systems operational life greenhouse gas emissions savings						
ENE 08	CLNT / M&E	Calculations determining significant unregulated energy use for building	N/A	2	2	0	0	Office and IT equipment to be procured in line with the guidance requirements
	CLNT	Design Stage specification/commitment confirming significant unregulated energy use for building, and compliant criteria is met for reduction in energy consumption						
Total Credits				21	9	0	0	
Total Credits (Weighted)			0.70	22.99	11.13	0.00	0.00	

BREEAM 2018 Design Stage Evidence Tracker

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BREEAM Requirements

	%	BREEAM Rating
Target Rating	71.71	Excellent
Potential Rating	73.38	Excellent
Current Rating Achieved	0.00	Not Rated
Minimum Standards Met	Not Rated	



CREDIT	ACTION	EVIDENCE REQUIRED	MINIUMUM REQUIREMENT	CREDITS AVAILABLE	CREDITS TARGETED	CREDITS ACHIEVED	POTENTIAL CREDITS	COMMENTS
TRANSPORT								
TRA 01	CLNT	Travel Plan completed at design and feasibility stages	N/A	2	2	0	0	
	CLNT	Transport statement completed at design and feasibility stages						
	CLNT	Confirmation of occupier's involvement in development of Travel Plan						
	CLNT	Confirmation that the Travel Plan will be implemented during occupation						
TRA 02		Confirmation that Tra 01 is achieved	N/A	10	6	0	2	Targeted items; car sharing group cycle storage spaces cyclists' facilities three existing accessible amenities one new accessible amenity Optional items; electric recharging stations car sharing group
	Focus	Confirmation of the building's Accessibility Index (AI)						
	CLNT / ARC	Schedule of the Sustainable Transport options implemented within the development (as detailed in Table 7.3 of the guidance manual)						
Total Credits				12	8	0	2	
Total Credits (Weighted)			0.83	9.99	6.66	0.00	1.67	
WATER								
WAT 01	Focus	Completed copy of the BREEAM Wat 01 calculator	GOOD	5	3	0	0	Flow rates and volumes to be confirmed for sanitaryware facilities
	CON	Design Stage specification/commitment confirming sanitaryware/water usage equipment flow rate/volume specification						
	ARC	Design drawings confirming equipment locations						
	ENG	Engineers report confirming grey/rain water yield (ltr/day/person)						
	ENG	Design Stage specification/commitment confirming greywater/rainwater recycling system to be installed						
WAT 02	M&E	Design Stage specification/commitment confirming water meter to be installed	GOOD	1	1	0	0	Water meter with pulsed output to be installed on mains incoming supply
WAT 03	M&E	Design Stage specification/commitment confirming compliant water leak detection system to be installed	N/A	1	1	0	0	
	M&E	Design Stage specification/commitment confirming compliant water leak prevention system to be installed	N/A	1	1	0	0	
WAT 04	ARC	Design Stage specification/commitment of the identified unregulated water demands and confirmation of solution to reduce demand	N/A	1	1	0	0	Landscaping specification to incorporate plants that either thrive in hot and dry conditions, or that rely solely on natural precipitation
Total Credits				10	7	0	0	
Total Credits (Weighted)			0.78	7.99	5.44	0.00	0.00	
MATERIALS								
MAT 01	SUB	Retail, Industrial and Offices ONLY: Results of the RIBA Stage 2 BREEAM Simplified or IMPACT compliant Life Cycle Assessment comparison of the superstructure against the BRE benchmark	N/A	6	4	0	0	Stage 4 life cycle assessment will be required for these credits
	SUB	RIBA Stage 2 LCA Options Appraisal of the superstructure						
	SUB	Confirmation that the LCA and MAT 01/02 calculator Tools have been submitted to BRE ahead of planning permission application						
	SUB	Retail, Industrial and Offices ONLY: Results of RIBA Stage 4 BREEAM Simplified or Impact compliant Life Cycle Assessment comparison of the superstructure against the BRE benchmark						
	SUB	RIBA Stage 4 LCA Options Appraisal of the superstructure						
	SUB	RIBA Stage 2 LCA Options Appraisal of the substructure and hard landscaping	N/A	1	1	0	0	
MAT 02		Schedule of construction products and associated EPD certificates	N/A	1	0	0	0	
		Copies of EPD certificates						
		Completed Mat 01/02 Results Submission Tool						

BREEAM 2018 Design Stage Evidence Tracker

CLIENT:	DDA Ltd
PROJECT:	Lidl, Stoneham
DATE:	18.08.2022
REVISION:	2

BREEAM Requirements

	%	BREEAM Rating
Target Rating	71.71	Excellent
Potential Rating	73.38	Excellent
Current Rating Achieved	0.00	Not Rated
Minimum Standards Met	Not Rated	



CREDIT	ACTION	EVIDENCE REQUIRED	MINIUMUM REQUIREMENT	CREDITS AVAILABLE	CREDITS TARGETED	CREDITS ACHIEVED	POTENTIAL CREDITS	COMMENTS
MAT 03	CON	Design Stage specification/commitment confirming all timber will be legally and responsibly sourced	MAN 03	N/A	Y	N	0	All timber used to be legally and responsibly sourced
	CON	Sustainable procurement plan	N/A	1	1	0	0	Copy of sustainable materials procurement plan required
	Focus	Completed copy of the Mat 03 calculator tool	N/A	3	2	0	0	Design specification required confirming materials will be sourced with environmental certification (eg. EMS, BES, PEFC, FSC etc.)
	CON	Design Stage specification/commitment confirming construction materials will be sourced from suppliers with relevant certification						
MAT 05	ARC	Design drawings highlighting vulnerable building areas	N/A	1	1	0	0	
	ARC	Durability specification						
	ARC	Statement confirming consideration has been given to limiting material degradation due to environmental factors						
MAT 06	ARC	Material efficiency report/statement	N/A	1	1	0	0	Consideration required throughout RIBA stages of how use of materials can be as efficient as possible
Total Credits				18	10	0	0	
Total Credits (Weighted)			1.07	18.99	10.71	0.00	0.00	
WASTE								
WST 01	CON	Copy of the Resource/Site Waste Management Plan /Design Stage specification/commitment confirming a compliant Plan will be produced to monitor waste arising	OUTSTANDING	3	2	0	0	Credit targeted for maximum waste generation of 6.5 tonnes/100m2 of floor area
	CON	Copy of the Resource/Site Waste Management Plan /Design Stage specification/commitment confirming a compliant Plan will be produced to monitor diversion from landfill		1	1	0	0	Credit targeted for diverting the following waste: non demolition - 80% demolition - 90%
			Exemplary Level Credits: copy of the RMP/SWMP confirming points achieved	N/A	1	0	0	0
WST 02	ENG	Schedule of amount and source of aggregates, confirming sustainable aggregates used where relevant	N/A	1	1	0	0	
	Focus	Completed Wst 02 calculator tool confirming the Project Sustainable Aggregate points achieved						
			Exemplary Level Credits: copy of the calculations confirming points achieved	N/A	1	0	0	
WST 03	ARC	Design drawings confirming location and dimensions of recyclable waste storage area	EXCELLENT	1	1	0	0	Site plan required highlighting location of recyclable waste storage area (2m2 per 1000m2 of floor areas); to be labelled as dedicated recycling
	CLNT	Design Stage specification/commitment confirming recyclable waste storage will be labelled						
WST 05	ARC	Climate change adaptation strategy appraisal	N/A	1	1	0	0	
		Exemplary Level Credit: credits Hea 04, Ene 01, Ene 04, Wat 01, Mat 05 and Pol 03 are achieved	N/A	1	0	0	0	
WST 06	ARC	Functional adaptation strategy and implementation recommendations report	N/A	1	1	0	0	Functional adaptation strategy study identifies ways of making the building more adaptable by RIBA Stage 2 and these measures adopted into design by RIBA Stage 4
	ARC	Implementation plan and design drawings measures outline in the report are adopted	N/A	1	1	0	0	
	ARC	Adaptability and disassembly guide provided to tenants						
Total Credits				12	8	0	0	
Total Credits (Weighted)			0.67	9.00	5.33	0.00	0.00	
LAND USE & ECOLOGY								
LE 01		Existing site plans with previous development footprint	N/A	1	0	0	0	
		Proposed site plans with developepment footprint overlaid on existing						
		Contaminated Land report	N/A	1	0	0	0	
		Copy of remediation strategy and implementation plan						

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CREDIT	ACTION	EVIDENCE REQUIRED	MINIUMUM REQUIREMENT	CREDITS AVAILABLE	CREDITS TARGETED	CREDITS ACHIEVED	POTENTIAL CREDITS	COMMENTS
LE 02	CLNT	Confirmation that compliance is monitored against all relevant UK and EU or international legislation relating to the ecology of the site.	LE02	N/A	Y	N	0	
	ECOL	Route 2: Suitably Qualified Ecologist's report	N/A	2	2	0	0	
LE 03	CLNT	Confirmation that compliance is monitored against all relevant UK and EU or international legislation relating to the ecology of the site.	LE03	N/A	Y	N	0	As above, credits can be achieved through either ecology report or checklists
	CLNT	Meeting minutes/PEP/similar confirming roles and responsibilities have been clearly defined, allocated and implemented to support successful delivery of project outcomes at an early enough stage to influence the concept design or design brief	N/A	1	1	0	0	
	CLNT	Confirmation that site preparation and construction works have been planned for and are implemented at an early project stage to optimise benefits and outputs						
	CLNT	Consultation with representative stakeholders and confirmation that data collated and shared, have implemented solutions, and measures have been selected						
	ECOL	Route 2: Suitably Qualified Ecologist's report	N/A	2	1	0	0	
LE 04		LE03 has been achieved	LE04	N/A	Y	N	0	
	CLNT	Consultation with representative stakeholders and confirmation that data collated and shared, have implemented solutions, and measures to enhance ecology have been selected	N/A	1	1	0	0	
	ECOL	Route 2: Suitably Qualified Ecologist's report	N/A	2	1	0	0	
	ECOL	Ecologist to provide records to the local environmental records centre where relevant						
LE 05		LE03 and one credit under LE04 (item 5) have been achieved	LE05	N/A	Y	N	0	
	CLNT	Confirmation that compliance is being monitored against all ecology legislation						
	CLNT	Consultation with representative stakeholders and confirmation that data collated and shared, have implemented solutions, and measures to monitor/review effectiveness of plans for LE03 and LE04	N/A	1	1	0	0	
	CON	Confirmation that ecological mitigation and improvements will be monitored and maintained						
	CON	Confirmation that a section on ecology will be included in the manual provided to the building user at handover						
	ECOL	Landscape and ecology management plan	N/A	1	1	0	0	
Total Credits				12	8	0	0	
Total Credits (Weighted)			1.00	12.00	8.00	0.00	0.00	
POLLUTION								
POL 01		Design Stage specification/commitment confirming refrigerants to be installed in line with the requirements of BS EN 378:2016 and where relevant, refrigeration systems containing ammonia comply with the Institute of Refrigeration Ammonia Refrigeration Systems code of practice	POL 01	N/A	Y	N	0	
		Where refrigerants are specified; calculations confirming Direct Life Cycle CO2 equivalent emissions	N/A	2	0	0	0	
		Confirmation that a compliant leak detection and containment system is specified	N/A	1	0	0	0	
POL 02	M&E	Written confirmation of the installed heating and hot water strategy	N/A	2	2	0	0	Credits achieved by default where heating and hot water is provided solely by non-combustion systems
	M&E	Design Stage specification/commitment confirming NOx emissions of heating and hot water systems						
	M&E	Calculations confirming total average NOx emissions from heating and hot water						

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CREDIT	ACTION	EVIDENCE REQUIRED	MINIUMUM REQUIREMENT	CREDITS AVAILABLE	CREDITS TARGETED	CREDITS ACHIEVED	POTENTIAL CREDITS	COMMENTS
POL 03	ENG	Flood Risk Assessment	N/A	2	2	0	0	Flood Risk Assessment required
	ENG	Where flood risk is high/medium: Design Stage specification/commitment confirming flood resilience measures and design flood level will be adhered to						
	ENG	Drainage strategy report	N/A	2	2	0	0	Volume run-off credit achieved where there is no increase in impermeable area
	ENG	Drainage drawings						
	ARC	Architectural drawings showing change in impermeable area						
	ENG	Drainage strategy report confirming first 5mm of rainfall is attenuated on site	N/A	1	1	0	0	Drainage strategy required confirming SUDs installed meet guidance criteria
	ENG	Drainage drawings						
	CON	Design Stage specification/commitment confirming pollution prevention systems have been design in accordance with PPG 3						
	CLNT	Design Stage specification/commitment confirming drainage plan will be made available to the building occupier						
POL 04	M&E	Design Stage specification/commitment confirming external lighting will be installed in accordance with relevant ILP guidance	N/A	1	1	0	0	Specification to be in line with ILP guidance notes on reduction of night time light pollution
	M&E	External lighting plan						
POL 05	ARC	Site location plan	N/A	1	1	0	0	
	SUB	Noise impact assessment						
	CON	Design Stage specification/commitment confirming any attenuation measures recommended will be installed						
Total Credits				12	9	0	0	
Total Credits (Weighted)			0.67	8.00	6.00	0.00	0	



Appendix 3

BREEAM 2018 New Construction Key RIBA Stage Requirements

BREEAM Guidance Requirements

New Construction 2018

BREEAM 2018 New Construction Key RIBA Stage Requirements

Issue	Credit	Assessment Criteria	Evidence Required
RIBA Stage 0			
No specific requirements at this stage			
RIBA Stage 1			
Transport	TRA 02 - Sustainable Transport Measures	Transport Options Implementation (option 6 only). The design team consults with the local authority on the state of the local cycling network and pedestrian routes, to focus improving those that the authority deems most relevant to the project	Written evidence of consultation with local authority or written confirmation that it occurred
Materials	MAT 03 - Responsible Sourcing of Construction Products	Enabling Sustainable Procurement. A sustainable procurement plan must be used by the design team to guide specification towards sustainable construction products and must be in place before concept design stage	Organisational level or project specific sustainable procurement plan
	MAT 06 - Material Efficiency	Set targets and report on opportunities and methods to optimise the use of materials	Materials Efficiency report/statement. To be reviewed at the following RIBA stages: 1 - Preparation & brief 2 - Concept design 3 - Developed design 4 - Technical design 5 - Construction
Land Use & Ecology	LE 02 - Ecological Risks and Opportunities	Survey and Evaluation (route 2 of assessment only). A Suitably Qualified Ecologist (SQE) carries out a survey and evaluation for the site early enough to influence site preparation works, layout and, where necessary, strategic planning decisions (typically Preparation and brief stage)	Ecologist's report as well as appointment letter or similar, confirming they were engaged at the appropriate stage
RIBA Stage 2			
Management	MAN 01 - Project Brief and Design	Project Delivery Planning. Prior to completion of the concept design, the project delivery stakeholders meet to identify and define their roles, responsibilities and contributions for each of the key phases of project delivery.	Meeting minutes/project directory or similar confirming the following team members have been appointed and their role, responsibilities and necessary contributions on the project confirmed: - Client - Building occupier (where known) - Design team - Principal contractor or similar with construction management experience (e.g. construction project manager)
		Stakeholder Consultation (interested parties). Prior to completion of the Concept Design, the design team consult with all interested parties on matters that cover the minimum consultation content	Consultation plan setting out the process and scope of the consultation
		BREEAM AP (concept design). Involve a BREEAM AP (Advisory Professional) in the project and its design at an appropriate time and level	BREEAM AP appointment letter/documents and documented commitment to achieve BREEAM target (e.g. meeting minutes or performance specification etc)
Management	MAN 02 - Life Cycle Cost and Service Life Planning	Elemental LCC. An appropriate person is commissioned to carry out an outline, entire asset life cycle cost plan together with any design options appraisals	The life cycle cost report and confirmation that it has been undertaken at the appropriate stage
Health & Wellbeing	HEA 06 - Security	Security of site and building. A suitably qualified security specialist (SQSS) conducts an evidence based security needs assessment. The SNA is used to identify attributes of the proposal, site and surroundings which may influence the approach to security for the development	Correspondence with the SQSS (e.g. Police CPDA) confirming their advice has been sought at this stage and the completed SNA

BREEAM Guidance Requirements

New Construction 2018

BREEAM 2018 New Construction Key RIBA Stage Requirements

Issue	Credit	Assessment Criteria	Evidence Required
Energy	ENE 04 - Low Carbon Design	Passive Design Analysis. The project team carries out an analysis of the proposed building design/development to influence decisions made during concept design stage and identify opportunities for the implementation of passive design solutions that reduce demands for energy consuming building services.	Passive design analysis report
		Low Zero Carbon Feasibility Study. A feasibility study has been carried out by the completion of the concept design stage by an energy specialist to establish the most appropriate recognised local (on-site or near-site) low or zero carbon (LZC) energy source(s) for the building/development.	LZCT feasibility study report
	ENE 07 - Energy Efficient Laboratory Systems	Design Specification. Engage with the client during the preparation of the initial project brief to determine occupant requirements concerning laboratory systems.	Meeting minutes or other written evidence demonstrating consultation
Transport	TRA 01 - Transport Assessment and Travel Plan	Travel Plan. Develop a travel plan during the 'feasibility and design stages' based on a site specific travel assessment or statement.	Travel plan
Materials	MAT 01 - Environmental Impacts from Construction Products - Building Life Cycle Assessment	Superstructure - Comparison with BREEAM benchmark (Offices, Industrial and Retail buildings only). Carry out a building LCA and compare against the BREEAM benchmark.	LCA options appraisal summary document
		Superstructure - Options Appraisal (all building types). Carry out a building LCA including 2-4 significantly different superstructure options	LCA options appraisal summary document
Waste	WST 01 - Construction Waste Management	Pre-demolition Audit. Complete a pre-demolition audit of any existing buildings, structures or hard surfaces being demolished. This must be used to determine whether refurbishment or reuse is feasible and to maximise the recovery of materials where demolition occurs.	The pre-demolition audit
Waste	WST 05 - Adaptation to Climate Change	Resilience of Structure, Fabric, Building Services and Renewables Installation. Conduct a climate change adaptation strategy appraisal for structural and fabric resilience by the end of concept design, in accordance with the following approach: a. Carry out a systematic (structural and fabric resilience specific) risk assessment to identify and evaluate the impact on the building over its projected life cycle from expected extreme weather conditions arising from climate change and, where feasible, mitigate these impacts. The assessment should cover the following stages: i. Hazard identification ii. Hazard assessment iii. Risk estimation iv. Risk evaluation v. Risk management.	Climate change adaptation strategy/report
	WST 06 - Design for Disassembly and Adaptability	Recommendations report. Conduct a study to explore the ease of disassembly and the functional adaptation potential of different design scenarios	Disassembly and functional adaptability study

BREEAM Guidance Requirements

New Construction 2018

BREEAM 2018 New Construction Key RIBA Stage Requirements

Issue	Credit	Assessment Criteria	Evidence Required
Land Use & Ecology	LE 02 - Identifying and Understanding the Risk and Opportunities for the Project	Determining the Ecological Outcomes (routes 1 and 2 of assessment). The project team liaise and collaborate with representative stakeholders early enough to influence key planning decisions (typically Concept Design stage)	Meeting minutes or similar written documentation of the consultation
	LE 03 - Managing Impacts on Ecology	Planning, Liaison, Implementation and Data. Roles and responsibilities have been clearly defined, allocated and implemented to support successful delivery of project outcomes at an early stage to influence the concept design	Meeting minutes or similar written documentation of the consultation
RIBA Stage 3			
Management	MAN 01 - Project Brief and Design	BREEAM AP (developed design). Involve a BREEAM AP (Advisory Professional) in the project at this stage of design. The first BREEAM AP credit (see RIBA stage 2 section) must be achieved first	BREEAM AP appointment letter/documents and documented commitment to achieve BREEAM target (e.g. meeting minutes or performance specification etc)
Materials	MAT 06 - Material Efficiency	Set targets and report on opportunities and methods to optimise the use of materials	Materials Efficiency report/statement. To be reviewed at the following RIBA stages: 1 - Preparation & brief 2 - Concept design 3 - Developed design 4 - Technical design 5 - Construction
RIBA Stage 4			
Management	MAN 02 - Life cycle cost and service life planning	Component Level LCC option appraisal. A component level LCC option appraisal has been developed in line with PD 156865:2008 and includes the following component types (where present): a. Envelope, e.g. cladding, windows, and/or roofing b. Services, e.g. heat source cooling source, and/or controls c. Finishes, e.g. walls, floors and/or ceilings d. External spaces, e.g. alternative hard landscaping, boundary protection.	Component level life cycle cost plan
	MAN 04 - Commissioning and Handover	Commissioning - Design and Preparation. The client or principal contractor appoints an appropriate project team member who is not involved in the installation of systems to undertake commissioning design reviews and management of the commissioning process	The commissioning manager's design reviews and confirmation that they are sufficiently independent from the installation works
Materials	MAT 01 - Environmental Impacts from Construction Products - Building Life Cycle Assessment	Options Appraisal During Technical Design (all building types). Carry out building LCA options appraisal of 2 to 3 significantly different superstructure design options. No requirement to achieve the associated credits under the RIBA stage 2 section	Updated LCA options appraisal summary document
Waste	WST 05 - Adaptation to Climate Change	Resilience of Structure, Fabric, Building Services and Renewables Installation. Update the appraisal carried out at RIBA stage 2 to confirm how the measures proposed have been implemented into the design	Updated climate change adaptation strategy/report

BREEAM Guidance Requirements

New Construction 2018

BREEAM 2018 New Construction Key RIBA Stage Requirements

Issue	Credit	Assessment Criteria	Evidence Required
Waste	WST 06 - Design for Disassembly and Adaptability	Implementation. Update the appraisal carried out at RIBA stage 2 to confirm how the measures proposed have been implemented into the design	Disassembly and functional adaptability implementation plan report
RIBA Stage 5			
Management	MAN 03 - Responsible Construction Practices	BREEAM AP (site). A BREEAM AP is appointed to monitor the project to ensure ongoing compliance with the relevant sustainability performance/process criteria, and therefore BREEAM target(s), during the construction stage. To do this, the AP will ideally be site based or will visit the site regularly to carry out spot checks, with the relevant authority to do so and require action to be taken to address shortcomings in compliance. The AP will monitor site activities with sufficient frequency to ensure that risks of non-compliance are minimised. They will report on progress at relevant project team meetings including identifying potential areas of non-compliance and any action needed to mitigate.	BREEAM AP appointment letter/documents and documented commitment to achieve BREEAM target (e.g. meeting minutes or performance specification etc)
RIBA Stage 6			
No specific requirements at this stage			
RIBA Stage 7			
No specific requirements at this stage			