

Atelier
Carbonlite Challenge

RIBA 
Developed with RIBA support



Carbon & Sustainability Assessment Form

Version 1.0 11/2021



What is this form for?

The purpose of this form is to gather key information on your scheme that allows Atelier to calculate the scheme's Carbon & Sustainability score. This helps both you and Atelier to understand the sustainability credentials of your development, and the subsequent Carbon & Sustainability Rebate you might expect to achieve.

Who should complete this form?

You should complete this form only once you have agreed to the Carbonlite Challenge Sustainability Charter. The information required in this form should be available from the project's professional team. If your professional team is unable to provide all of the information, our Carbon & Sustainability Assessor may be able to help you. Fees may apply (see Carbonlite Challenge Professional Fees).

Information about completing the form

This document is split into two sections: the **Headline Assessment Information** and the **Full Carbon & Sustainability Assessment**.

Section 1 – Headline Assessment Information

All Carbonlite Challenge scheme proposals require the **Headline Assessment Information** to be completed. Please complete this section, as it will enable us to conduct an initial eligibility assessment, to calculate the estimated Carbon & Sustainability Rebate and to issue Indicative Terms.

Section 2 – Full Carbon & Sustainability Assessment

Pre-drawdown, all Carbonlite Challenge scheme applications will require a **Full Carbon & Sustainability Assessment** to be completed. It is this assessment which will confirm your scheme's eligibility for Carbonlite Challenge, and determine the Carbon & Sustainability Rebate and final terms. You can complete the Full Carbon & Sustainability Assessment when you or your professional team have all the required data available. If you do not have all of this data available, our Carbon & Sustainability Assessor may be able to help you. Fees may apply (see Carbonlite Challenge Professional Fees).

Actual rebates will be subject to the findings of development monitoring, site visits and final calculations at Practical Completion.

Only sign this form when submitting the Full Carbon & Sustainability Assessment.



Section 1: Headline Assessment Information

You must complete and submit the Headline Assessment Information. The data is usually available from the project’s professional team.

Project name:	
Project address:	
Name of person responsible for completion of this form:	
Role (eg developer, architect):	
Contact phone number:	
Email:	

Option 1 or Option 2 below must be completed as a minimum for an initial assessment of the project’s eligibility for Carbonlite Challenge.

Option 1: I know which RIBA Climate Challenge target my project is on track to achieve

	On track against RIBA 2025 Climate Challenge v2 Target	On track against RIBA 2030 Climate Challenge v2 Target
I believe my project is: (tick as appropriate)	<input type="checkbox"/>	<input type="checkbox"/>

Option 2: I know my project’s embodied and operational carbon information

(Even if you have completed Option 1, please still complete Option 2 if possible, as it will help in determining an accurate score and producing Indicative Terms)

Item	Question (where applicable)	Data Source	Response	Metric
PA1	What is the average dwelling Embodied Carbon result?	Whole Life Carbon Assessment (WLCA)		(kgCO ₂ e/m ²)
PA2	What is the average dwelling Operational Energy result?	SAP calculations		(kWh/m ² /y)
PA3	What is the average dwelling water efficiency?	Part G calculations or WATO1 calculation		(l/p/day)

It is important to note that in order to qualify for Carbonlite Challenge, your scheme must score, on a scale of A-E, at least a C grade based on the results of the Full Carbon & Sustainability Assessment, which will be determined following the validation of these responses by the Atelier Carbon & Sustainability Assessor. In practice, it is likely that most schemes designed to achieve RIBA 2025 or 2030 targets would rate ‘C’ or higher. Feedback from the Carbon & Sustainability Assessor will be given to the developer to ensure schemes have the opportunity to improve the Carbon & Sustainability Scores.



Section 2: Full Carbon & Sustainability Assessment

The following fields must be completed as thoroughly as possible.

Full completion of this form is required before drawdown of any loan facility.

Questions highlighted in red are eligibility questions, which must be completed in all cases.

Item	Question/ requirements	Data source (where applicable)	Response	Metric
A4	Project value (GDV of the site)			
A5	Gross Development Area (m ²)	Accommodation schedule		
A6	Number of dwellings	Accommodation schedule		
A12	Has the scheme had a Home Quality Mark review?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
PA4	What was the average HQM score?	BRE Home Quality Mark (HQM)		(Range 3-5 stars)
FA1	What is the location type?		Urban <input type="checkbox"/> Rural <input type="checkbox"/>	n/a
FA2	Has there been/ will there be a consultation with local transport providers (ie to ensure good links are maintained or improved)?		Yes <input type="checkbox"/> No <input type="checkbox"/>	n/a
FA3	Has an ecology report been conducted? What are the recommendations? What measures have been taken?			n/a
FA4	Is there a communal space located within walking distance? What is the m ² ?			(m ²)
FA5	Will there be growing space provided? What is the m ² ?			(m ²)



Item	Question/ requirements	Data source (where applicable)	Response	Metric
FA6	What is the flood risk for the site?		Low <input type="checkbox"/> Medium <input type="checkbox"/> High <input type="checkbox"/>	Prerequisite item
FA7	Are watercourses protected?			n/a
FA8	Will a Home Information Pack be provided?			Prerequisite item
FA9	Has a Suitably Qualified Security Specialist been engaged in the design development? What are the measures to be taken?			Prerequisite item
FA10	Are there kitchen extractors (ie to ensure extraction and good indoor air quality are provided)?		Yes <input type="checkbox"/> No <input type="checkbox"/>	n/a
FA11	What is the main heating and hot water source?		Gas <input type="checkbox"/> Electric <input type="checkbox"/> Other <input type="checkbox"/>	n/a
FA12	Have Average Daylighting calculations been conducted?	Please provide the document		n/a
FA13	Has a Suitably Qualified Acoustician been appointed? What are the measures to be taken?			Prerequisite item
FA14	What are the sound assessment criteria and results?	Internal and external noise levels		n/a
FA14a		Impact and airborne sound levels		n/a
FA17	Are energy display devices installed?			n/a
FA18	What energy ratings are set for all white goods?		Heating <input type="checkbox"/> Gas <input type="checkbox"/> Electrical <input type="checkbox"/> All <input type="checkbox"/>	n/a
FA19	Is external lighting specified as Low Energy efficiency type?		A++, A+, A, B, C, D, E	n/a



Item	Question/ requirements	Data source	Response	Metric
FA20	Has a Low Zero Carbon feasibility study been conducted? What was recommended?			n/a
FA21	Is all traded timber in use legally harvested?	FSC/PFC		Prerequisite item
FA22	Is there a sustainable procurement plan in place?			n/a
FA23	Can Environmental Product Declaration (EPD) certificates for bulk building materials be provided?	Check specification		n/a
FA24	What is the embodied carbon result for the average dwelling?	WLCA report		n/a
FA25	What drying facilities are provided?		eg tumble dryer/lines	n/a
FA26	Has Wheelchair access been accommodated?		Yes <input type="checkbox"/> No <input type="checkbox"/>	n/a
FA27	What provision of waste streams has been incorporated for the dwellings? (include volumes of waste streams where possible)		eg. segregated, food waste, associated volumes	n/a
FA28	What Cycle Storage is provided?			n/a
FA29	What Electric Vehicle (EV) charging has been provided?			n/a
FA31	Has the Carbonlite Challenge Sustainability Charter been signed up to?			n/a



Item	Question/ requirements	Data source	Response	Metric
FA32	Will onsite energy use be monitored including all building-related energy and water use throughout the project life cycle?		Yes <input type="checkbox"/> No <input type="checkbox"/>	n/a
FA33	Is there a sustainability policy in place for the development company as a whole?			n/a
FA34	Has a pre-demo audit been conducted? What are the project's diversion rates?			n/a
FA35	Will there be a building warranty?			Prerequisite item
FA36	Will the Building User Guide be produced and handed over to the homeowner?		Yes <input type="checkbox"/> No <input type="checkbox"/>	Prerequisite item
FA37	Will there be on-call support for occupiers post-handover?		Yes <input type="checkbox"/> No <input type="checkbox"/>	n/a
FA38	Will there be a Post-Occupancy Evaluation on the following items?	Occupant satisfaction	Yes <input type="checkbox"/> No <input type="checkbox"/>	n/a
FA38a		Energy and temperature monitoring	Yes <input type="checkbox"/> No <input type="checkbox"/>	n/a
FA38b		Advance Post-Occupancy Evaluation	Yes <input type="checkbox"/> No <input type="checkbox"/>	n/a
FA38c		Independent third-party verification on Post-Occupancy Evaluation	Yes <input type="checkbox"/> No <input type="checkbox"/>	n/a



Documents List

The following documents will be required as part of the Carbon & Sustainability Assessment due diligence process. This will support the integrity of the scheme, as well as the calculations that underpin the Carbon & Sustainability Rebate.

- Accommodation Schedule
- Site Plan
- SAP Calculations and Results
- Architects' Daylighting Calculations
- Material List and Breakdown – Types and if possible quantities
- Employers' Requirements
- Project Specification
- Architect Layout Dwellings (PDFs)
- Sanitaryware Schedule
- Mechanical & Electrical (M&E) Spec or Contractors' Proposals
- Whole Life Carbon Assessment if conducted
- Ecology Reports
- Acoustic Reports
- Landscape Dwellings
- Transport Assessment
- Security Consultations
- Post-Occupancy Evaluation Programme Schedule
- Building User Guide Proposal
- Planning Consent
- Section 106

Onsite Carbon & Sustainability Assessment and Post-Occupancy Evaluation

Periodically and at Practical Completion, site visits will be made to verify that the project is being delivered in compliance with its design. There will also be certain verification documents required. These include, but are not limited to, the following.

- Post-Occupancy Evaluation reports
- Building User Guide
- Records of handover (letter confirming date of handover and signed section for management company and tenant/owner to witness this has happened)
- 2 months' bill data to check against proposed operational energy results
- Invoices
- Vested certificates
- Building control inspection reports
- Structural warranty inspection reports
- Health & Safety audits
- Updates on planning conditions
- Updates on planning amendments

Declaration

I declare that the replies to the questions contained herein, and that the information and documents provided by me in support of this Carbon & Sustainability Assessment Form, are true and complete in every respect to the best of my belief, and I understand that they will be relied upon by, and may form the basis of any contract between, me and Atelier Capital Partners Limited providing the credit facility.

By signing this form you are confirming your agreement to proceed, and you are accepting that we may use your information in this way.

Company developer name	<input type="text"/>	Signatory name (on behalf of the developer)	<input type="text"/>
Signed	<input type="text"/>	Date (dd/mm/yyyy)	<input type="text"/>

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