



European
Commission

TESTING PROTOCOL FOR LEVEL(S)

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Get to know Level(s)

- Check out the [Level\(s\) webpage](#) with introduction to the tool and a range of communication material in different languages.
- Familiarise yourself with the new assessment tool by reading the [Level\(s\) documentation part 1](#). Learn about the indicators and tools that Level(s) is made up of by reading the [Level\(s\) documentation part 2](#).
- Look, either at the [video recording of presentations by Nicholas Dood at the Joint Research Center](#), or at the [power point presentations](#) directly, concerning:
 - the introduction of Level(s)
 - how to work with the assessment, example with one of the indicators
 - technical support that will be provided for organisations testing level(s)

How could you test Level(s)?

- Check how to choose indicators in the [Guidance and rules for test indicators selection](#).
- Check the [common reporting format](#), which provides the structure for the reporting of the indicator outputs.
Note however that the data requirements and the tools needed to generate the indicator output are referred to, for each indicator, in the [Level\(s\) documentation part 3](#).
- Decide if you will want to test Level(s) on
 - a new building or a renovation project
 - an ongoing building project or a finalised one for which you have access to sufficient data
- Decide which indicators you want to test and at what level you want to do it:
 - Level 1: the entry level for those who are relatively new to environmental performance assessment
 - Level 2: for those who have more experience with environmental performance assessments, and who want to make meaningful comparisons between buildings
 - Level 3: for those who have significant experience with environmental performance assessment and want to work in more detail to model and improve performance
- If you are interested in the quality and, hence, reliability of the generated output, and the extent to which this could be taken into account in financial appraisal methods, you may also consider looking into the indicator of 'value creation and risk factors'. See section 6.2 in the [Level\(s\) documentation part 3](#).

Commitment as a tester

- Check the [registration form](#), for those organisations that will be testing Level(s), and make sure you have the necessary information. This register will help the European Commission to have an early overview of which parts of Level(s) are to be tested, by whom and where. It will help us to detect potential gaps.
- Check the [commitment](#) required from you in terms of the expected feedback from testers to the European Commission.
- Be aware that a survey will be used by the European Commission to collect feedback on testing experience. The survey answers will help the Commission to ensure that Level(s) is as user friendly a tool as possible. This survey will be available online by June 2018.



The Level(s) tester survey

Test registrants are required to participate in an on-line survey of their experience using Level(s) and how it meets the original aims established by the Commission. Topics you can expect to be asked about include:

- How it has been used, for what purposes and at which project stages
- How accessible and useful the guidance and reporting tools are and how it compares with other tools and guidance that are available
- The extent to which it drove or helped identifying performance improvement opportunities and/or project benefits
- The extent to which it encouraged you to tackle new aspects of performance and the experience of doing this
- The extent to which it was possible to use it with in-house expertise or if external expertise was needed
- The time, cost and data needs at different levels
- The relative value of the different aspects of levels
- Your main recommendations for improvement and support needs

Register to test Level(s) on your project(s)

- [Register](#) each building project which will be used in the testing of Level(s). A building project can consist of either one building or a selection of house or apartment types from within a development, provided that the same indicators will be tested. A project should have one single point of contact, and a back-up contact.
- You can register to test Level(s) by performing an assessment on a whole building or, if you are developing residential properties, to test a sample of property types within a block, development or catalogue.
- You will receive confirmation of your registration as well as the commitment which sets out the expected feedback by the tester.
- Sign this commitment to share knowledge and results and send it to DG Environment and DG JRC.
- Receive information on how you can access the different tools for technical support (help desk, platform to share and consult experience with other organisations testing Level(s), webinar programme).

Preparing to make the test

- Brief the technical team and go through the performance assessment requirements.
- Look through the guidance and rules for your choice of the level, indicators and tools. The starting point for all assessment is the common guidance under Level(1). [Part 2](#) provides a general introduction to each indicator and [part 3](#) can be consulted for guidance on how to carry out the performance assessment.
- In part 3, pay special attention to the reference materials, methods and standards that should be used and any specific guidance that is provided. It may be possible to use data from other

building assessments and reporting tools that you are using on the project, which could save time and resources.

- Although the Level(s) survey (see «Commitment as a tester») should be filled in towards the end of the test project, download the questions in order to have them in mind throughout the project.

Seeking help and support during the test

- You can request help on the interpretation of and the intended use of the Level(s) guidance and methodology by sending precise and specific queries to the JRC Level(s) helpdesk. Be aware that the helpdesk will not provide individual technical and project specific solutions to testers.
- The helpdesk will confirm receipt of your query and indicate the timescale for responding to you.
- You may also have access to support in your country. Should such a structure be set up, testers will be informed by the European Commission.
- Look out for other sources of support and guidance that will be provided by JRC during the testing (see box below).

Ongoing support functions provided by JRC

What happens if lots of enquiries are received about an issue?

From time to time, the JRC will run webinars on topics that have generated a lot of enquiries.

- Please look out for notifications about webinar topics that are planned
- Up to 3-4 webinars/year are planned in **2018** and **2019**, depending on demand
- Webinar notes will report the main outcomes of these webinar discussions.

What happens if there is a correction needed or updated reference in the guidance?

- **A technical note** will be issued

What happens if there is a new software tool or database to use?

- **Dynamic list** available on JRC website will be updated

How can I hear about the experience of other testers?

A platform will be available for participants to **share experiences and information** in relation to specific topics. Discussion forums may be initiated:

- by JRC, following survey, helpdesk and webinar feedback;
- at the request of test participants to JRC or DG ENV, in order to tackle specific topics.

All webinar news, listings and technical updates will be posted here:

http://susproc.jrc.ec.europa.eu/Efficient_Buildings/documents.html

Reporting on the results of your test

- Once you have completed the performance assessment for a specific project stage, you will be ready to submit your results to the Commission. Results can be reported for various project stages i.e. design, construction, post-completion, occupation.
- If your building is at the construction stage or later, there would be value in completing the reporting for prior stages - for example, to allow for comparison of construction waste predictions with actual waste from a site.

- For each indicator and tool, the Level(s) documentation part 3 provides a format for reporting. This format is furthermore provided in an easy to use spreadsheet, the so called “[common reporting format](#)”. The format comprises combination of data fields, background information requirements and checklists.
- Download the common reporting format and start by entering the description of the building and select your Level(s) reporting scope.
- If you are testing several building or accommodation types, you may need to use a separate common reporting format spreadsheet for each building or accommodation type (e.g. a housing development that is made up of several different house or apartment types). Alternatively, you could choose to only test a representative building or accommodation type.
- Upon completion, the common reporting format spreadsheet should be submitted to the Joint Research Centre, which will check that it has been filled out correctly. Submission should be done by the 30 June 2019 the latest.

Reporting on the test experience

- For the European Commission, the experience of using Level(s) is as important as the results from the assessments. Once you have submitted your results, you will need to complete the online Level(s) Survey (see «Commitment as a tester»).
- We recommend downloading the survey as a PDF first and arranging a debriefing session with the test team in order to discuss their experience, using the survey questions as a guide to collect their response.
- Once you have collected the response of your testing team, you should enter this onto the Level(s) Survey and submit the results. You can save your survey entry at any time and come back to the survey to complete it later.
- Once you have submitted the survey, the Joint Research Centre will make a quick check that it has been filled out correctly. Submission should be done by the 30 September 2019 the latest.

Participating in a test verification by the Joint Research Centre

- A sample of the test projects will be directly verified by the Joint Research Centre. The aim will be to check how the methods have been used and the way the guidance has been followed.
- The verification will inform the Commission on how the testing of Level(s) has worked. It will not be used to require reassessment by testers or to provide recommendations for modifications to the assessments performed by the testers.
- If selected, you and your test team should be ready to facilitate the Joint Research Centre work to verify your use of Level(s).
- The Joint Research Centre will contact the project test team and will need to make a review of the steps taken in making the performance assessments for each indicator and tool used, as well as organising some interviews in order to understand project processes.
- The Joint Research Centre will provide the necessary telephone and video conference facilities to enable this to take place efficiently.