

## Overview

This standard is about undertaking inspections of property to determine their energy performance and make recommendations for improvement. The aim of the inspection is to gather data and information, in accordance with the Reduced Data Standard Assessment Procedure (RDSAP) methodology, to enable the production of an Energy Performance Certificate and associated recommendations.

The standard includes conducting a visual inspection of the property, taking measurements and notes and identifying factors that affect the energy performance of the property. You must draw on your knowledge and experience of property structure and construction, materials performance, space and water heating systems and lighting systems, etc. and understand the detailed requirements of the Energy Performance Certificate and recommendations.

The standard also requires that you maintain records of your findings. You must record information using relevant methods in accordance with the relevant data protection legislation, and providing evidence to support your decisions on values recorded and energy efficiency measures made.

Note that the term 'assessment' is used throughout the standards when referring to the overall process of determining the energy performance of a property, whereas 'inspection' is used only when referring to on-site inspection of the property features.

You must understand and work to the requirements of each devolved nation.

## Performance criteria

### *You must be able to:* **Inspect property to determine energy performance**

1. confirm the availability of the equipment and resources required for the energy performance inspection
2. use the relevant equipment and interpret the available and gathered data to the required devolved nation's standards
3. provide evidence of your identity to those present at the property before commencing the inspection
4. identify circumstances when at the property that prevent continuing with the inspection and explain the reasons to the customer
5. undertake a visual inspection of the relevant aspects of the property in accordance with the requirements of the Reduced Data Standard Assessment Programme (RDSAP) methodology and conventions
6. identify and record the age and method of construction of the property, the main materials used, including the glazing, the space heating, water heating and lighting systems
7. observe and take measurements which are required to provide data for the calculation of an energy performance rating
8. obtain the required additional information about the property especially where this is needed to avoid recording an item as 'unknown'
9. make further investigations in accordance with the requirements of the Reduced Data Standard Assessment Programme (RDSAP) methodology, where observations are inconsistent with existing evidence and expected findings
10. follow the relevant devolved nation's procedures for collecting information to enable the energy efficiency of the property to be determined
11. if relevant during the inspection, provide basic advice regarding energy efficiency to occupants, suggesting sources of further information and advice
12. identify and record the factors that affect the choice of energy efficiency measures for the property in the Reduced Data Standard Assessment Programme (RDSAP)

### **Maintain records of inspection findings**

1. produce and maintain records of findings, including investigations

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- carried out, values recorded, and options considered, to the level of detail required in accordance with the Reduced Data Standard Assessment Programme (RDSAP)
2. collate relevant information as evidence to support the decisions made on values chosen and the energy efficiency measures considered
  3. create, maintain and supply when requested by the devolved nations, records of which energy efficiency measures were considered and rejected with justification
  4. maintain traceable records of investigations undertaken, values attributed and options considered
  5. record in the Reduced Data Standard Assessment Programme (RDSAP), if required, where and why inspection has not been possible or where data is recorded as 'unknown'
  6. store records securely in accordance with the relevant data protection legislation
  7. confirm that records can be accessed for future use when required
  8. co-operate with requests for inspection records in relation to monitoring or investigation by the relevant Accrediting Body, or equivalent in the devolved nations

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## Knowledge and understanding

*You need to know and understand:* **Inspect property to determine energy performance**

1. the equipment and resources required for the inspection and how to use them
2. the relevant detailed inspection requirements and conventions that apply to the property as defined by the current Reduced Data Standard Assessment Programme (RDSAP) methodology
3. the relevant definitions and conventions that apply to the current Reduced Data Standard Assessment Programme (RDSAP) methodology
4. the consequences, for both the rating result and energy efficiency measures, of recording an item as 'unknown' or 'as built'
5. how to recognise the various characteristics of buildings
6. how to identify the space and water heating system(s) and lighting system(s) present at the property
7. how to conduct the inspection in accordance with the relevant devolved nation's requirements
8. how to observe and take measurements which meet the required standards
9. how to make further investigations where observations are inconsistent with existing evidence and how to identify the causes of these inconsistencies
10. the requirements and application of relevant building regulations and other technical standards
11. the differences between Reduced Data Standard Assessment Programme (RDSAP) and the Standard Assessment Procedure (SAP) energy assessment methodologies
12. the importance of keeping records in accordance with the relevant data protection legislation
13. the purpose behind the relevant devolved nation's procedures for assessing the energy performance of property
14. the types of advice regarding energy efficiency that can be provided to occupants during inspection
15. the sources of information and advice about energy performance to which occupants can be referred
16. the factors that affect the choice of energy efficiency measures for the property

## Maintain records of inspection findings

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1. the range of methods, formats and conventions for recording information and evidence on the property and its energy performance
2. how to record the information and evidence in accordance with the relevant data protection legislation
3. the required range of information and evidence relating to the property and its energy performance as defined by the current Reduced Data Standard Assessment Programme (RDSAP) methodology and its associated guidance and conventions
4. the level of detail within your records required to produce an Energy Performance Certificate
5. the reasons you are required to record where and why an accurate inspection has not been possible
6. the circumstances in which records can include the fact that information is 'unknown' and the evidence required to support this choice

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**Scope/range**

## Circumstances:

- situations/occupants upon which it would be inappropriate to intrude
- the discovery of unexpected or hazardous conditions or materials
- other potential threats to health and safety
- property unsuitable for assessment with the RDSAP methodology

## Critical property features:

- rooms in the roof
- retrofitted insulation
- unseparated conservatory
- extensions
- wall construction
- primary, secondary and portable heating
- inadequate heating
- age of main property and of any extensions or roof rooms
- low and zero carbon technologies
- any other features that when incorrectly identified will have a significant detrimental effect to rating accuracy

## Factors such as issues that make them unsuitable for the property:

- listed building status
- interactions between building fabric and building services

## Records:

- complete, accurate and legible
- a complete and comprehensive Energy Performance Certificate
- justify decisions on values recorded and energy efficiency measures recorded

## Energy efficiency measures:

- energy performance improvements listed at Appendix T of the current version of SAP
- any other improvements that may be supported by UK Government policy or that of the Devolved Administrations, as listed in relevant legislation or guidance

## Issues that make them unsuitable for the property:

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- property situation e.g. subject to extreme weather
- property condition e.g. state of repair of external walls
- inadequate ventilation
- traditional construction
- system-built property
- any other features of the property, or its site/location, which might adversely affect the performance of the recommended improvement, or the building's performance after improvement

### Relevant information:

- legible site notes
- clear site sketches (plan, elevation) to give an adequate record of the inspection for audit purposes
- clear photographs containing mandated data (e.g. time and date) appropriately staged and annotated where necessary
- legibly completed survey forms
- records of web searches or other research
- any other information considered necessary to support decisions
- any other information required by Scheme Operating Requirements

## Undertake energy performance inspections

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