INSDEA1

Prepare for energy assessments of domestic property

Overview

This standard is for Domestic Energy Assessors (DEAs) preparing for energy assessments of domestic property. This is a legal requirement in all four nations.

It is about responding to requests for energy assessments from customers, clarifying their requirements and checking that the property is eligible for an energy assessment. You must explain the terms and conditions, any limitations or constraints that apply to energy assessments and confirm your fee and payment arrangements. You are expected to confirm the assessment procedures with customers and acknowledge any special circumstances applicable to your site visit, such as access to the property (or parts of it) or who will be present during the inspection.

This standard is about investigating matters which enable you to complete an energy assessment that informs the relevant national calculation methodology. This methodology provides an Energy Performance Certificate (EPC) and can inform a building owner on an estimate of energy, cost and carbon performance. The outputs from the energy assessment and calculation are used for a number of stakeholders and is regularly changing to meet different Government policy objectives and audiences.

You must also identify factors that influence the conduct of the assessment, e.g. health and safety issues or additional information that should be gathered during the on-site inspection. In some cases, your investigations may reveal problems that prevent you from undertaking an assessment of the energy performance of the domestic property; you are expected to inform the customers and explain the reasons to them.

Note that the term 'assessment' is used throughout the standards to refer to the overall process of completing the inspection and entering the information into the relevant national calculation methodology, via the Government Approved software interfaces, whereas 'inspection' is used only for on-site inspection of the property and its features.

You will be required to know and understand the relevant requirements of each devolved nation.

Performance criteria

You must be able to:

Agree and confirm instructions to undertake energy assessments and explain the relevant context and legislation to customers and/or occupiers

1. establish contact and respond to requests to undertake energy assessments, confirming their requirements and preparing them for the assessments
2. explain that an Energy Performance Certificate (EPC) is a legally required document in applicable circumstances, that its form and content are prescribed, and it includes recommendations for improving the property. Confirming that it:
   - 2.1 uses standardised assumptions about occupancy and heating patterns.
   - 2.2 does not factor in the condition of the property or condition of the features
   - 2.3 does not represent the actual energy use or cost of the property.
3. explain and confirm your fees, the terms and conditions under which you will undertake an energy assessment, your complaints procedures and the role of the Government Approved Accreditation and Professional Bodies.
4. explain the requirement to obtain and retain photographic and documentary evidence to support the records of inspection
5. explain the limitations and constraints of the energy assessment and the relevant associated legislation.
6. where relevant, direct the customer towards alternative approved methodology where the use of the relevant national calculation methodology for dwellings is not appropriate.
7. explain that a site visit is mandatory and make clear that access will be required to all relevant areas of the property
8. confirm the property address, the date, time, and estimated duration of the on□site inspection
9. identify circumstances that will prevent you from undertaking an energy assessment and explain the reasons to the customers
10. where relevant, explain the basic principles of domestic energy assessments and the role of the EPC in the relevant nation's energy efficiency programmes
11. obtain any previous assessments and explain that ratings and potential recommendations may differ from past assessments due to changes to the required methodology and the building
12. signpost customers towards independent specialist advice to ensure you are not working outside your own level of competence or role as an energy assessor

13. confirm you are accredited to undertake the assessment and explain the importance of carrying identification

Prepare for energy inspections and undertake pre inspection investigations and checks

1. investigate and record the required information to produce an EPC, including the required pre inspection information
2. evaluate relevant information to identify the factors that impact energy assessment
3. assess whether the property falls outside the scope of energy assessment legislation
4. confirm that the most up-to-date version of the approved methodology, software and associated reference materials can be accessed and used
5. identify potential health, safety and security risks with the property and the environment
6. prepare to take action to minimise or mitigate risks

Knowledge and understanding

You need to know and understand:

1. the range of potential impacts of climate change on buildings

Agree and confirm instructions to undertake energy assessments and explain the relevant context and legislation to customers and/or occupiers

1. the relevant policy and technical context relating to energy efficiency of buildings, including, but not limited to, climate change, emissions targets and fuel poverty, the role of Domestic Energy Assessor
2. the purpose behind the relevant devolved nation's procedures for assessing the energy performance of property
3. the basic principles of construction, heat loss (HTC), U Values, thermal bridging, airtightness and moisture in buildings
4. the types of construction of older and traditional buildings and the materials used, including local and regional variations.
5. the performance characteristics of older and traditional buildings compared to those of modern construction
6. that work on buildings with heritage protection requires different consents and permissions than work on buildings without protection.
7. the relevant national calculation methodology, including the defaults used when detailed information is not available
8. alternative calculation methodologies and circumstances when using them is appropriate
9. the relevant legislation, regulations and guidance related to domestic property energy assessments and EPCs for England, Scotland, Wales and Northern Ireland
10. the importance of knowing your level of competence and commitment to continued professional development (CPD)
11. where and when to refer customers to independent expert advice on matters beyond your competence level and role as an energy assessor
12. the types of domestic property and situations that do not by law require an EPC
13. the role of the EPC in the relevant nation's energy efficiency programmes
14. the factors that may make recommended energy efficiency measures unsuitable
15. the limitations of the methodology in terms of:
    - 15.1 using standardised assumptions about occupancy and heating patterns
    - 15.2 not taking into account the condition of the property or its individual

features
15.3 not representing the actual energy use or running costs of the property
15.4 not considering detailed geographical and environmental factors
15.5 not considering present and future climate change risks and the need for adaptation
15.6 not considering the impacts of moisture in dwellings on the energy performance and occupiers' health

16. the importance of ensuring pre-inspection information is accurate and complete
17. the fee structures and payment agreements for energy assessments
18. how to confirm on-site inspection arrangements and the requirements of the energy assessment
19. how to identify and explain circumstances that prevent you from undertaking an energy assessment
20. how to explain that ratings and proposed recommendations may differ from past assessments due to changes to the required methodology and the building

Prepare for energy inspections and undertake pre inspection investigations and checks

1. the types of domestic property to which energy assessment legislation does not apply
2. the range, sources and quality of information, including documentary evidence required to support a property assessment
3. the effects of geographical location, climate, aspect, orientation, and the differing exposure of individual elevations on the way buildings perform.
4. where to source information about the range of relevant legislation and official guidance relating to buildings with heritage protection, and when this might be necessary.
5. the sources of information to help establish the age of older and traditional buildings and their features
6. the importance of ensuring that you have access to the most up-to-date version of the relevant national calculation methodology software and associated reference materials
7. the relevant data protection, handling and cyber security legislation and guidance
8. the relevant health and safety legislation and guidance
9. how to identify, respond to and report any potential health, safety and security risks with the property and the environment
10. the actions taken to minimise or mitigate risks

Scope/range

Communicate:

- in person
- in writing
- by digital channels of communication

Specific arrangements:

- time and duration of the assessment
- confirmation of address
- access to the property
- presenting your accreditation identification
- those present at the property at the time of the on-site inspection
- health and safety issues

Circumstances that will prevent you from undertaking an energy assessment:

- properties beyond your level of competence
- your diary pressures
- difficulties in gaining access
- conflicts of interest
- concerns about information (e.g. missing, incomplete, out of date, inaccurate)
- health and safety considerations (e.g. potentially unsafe access to roof space or presence of asbestos cladding)

The range of information, including documentary evidence required to support a property assessment:

- concerning the age and construction of the property and the extensions
- concerning critical property features, such as window measurements and glazing types, ventilation and airtightness (where applicable) and energy storage (electric batteries and thermal stores) which may assist the energy assessment process

- concerning the installed building services (e.g. utility meters)
- concerning any energy efficiency measures (original and retrofitted)

Supporting knowledge of:

- how climate change impacts a building, including flooding, extreme weather events
- building structure and construction
- thermal comfort, including summer overheating
- thermal mass
- moisture movement
- age of building
- building fabric and insulations
- insulation U-values, as built insulations and unknown insulations
- materials performance
- space, floor plan, measuring heat loss and area calculations
- space heating systems
- hot water systems
- air quality, including ventilation systems
- lighting systems
- renewables and energy storage technologies

Understanding of:

- the detailed requirements of the Energy Performance Certificate (EPC)
- EPC recommendations
- EPC methodology calculation.

Factors that may make energy efficiency measures unsuitable for the property:

- listed building status, or a property is in a conservation area
- interactions between building fabric and building services

- property situation, e.g. subject to extreme weather, flood risk or high level of exposure
- property condition
- inadequate ventilation
- inadequate insulation e.g. impact on heat pump recommendations
- 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

Glossary

Accreditation Body

Accreditation bodies for Domestic Energy Assessors (DEAs) in the UK are government-approved organisations that verify the competence of professionals to produce valid Energy Performance Certificates (EPCs). They provide necessary training, software, and quality assurance auditing.

Building Services

These are the essential systems—heating, ventilation, lighting, plumbing, and security—that make buildings functional, safe, and comfortable. These technical components include MEP (mechanical, electrical, and plumbing) systems, fire safety, and energy management, designed to improve efficiency and occupant experience.

Data Protection

Data protection legislation controls how your personal information is used by organisations, including businesses and government departments.

Anyone responsible for using personal data must make sure the information is:

- used fairly, lawfully and transparently
- used for specified, explicit purposes
- used in a way that is adequate, relevant and limited to only what is necessary
- accurate and, where necessary, kept up to date
- kept for no longer than is necessary
- handled in a way that ensures appropriate security, including protection against unlawful or unauthorised processing, access, loss, destruction or damage.

Domestic Energy Assessor

Domestic Energy Assessor (DEA) is a qualified professional who carries out assessment of the energy efficiency of existing dwellings in accordance with relevant national calculation methodology to produce Energy Performance Certificates (EPCs).

Energy assessment

Energy assessment is used to refer to the overall process of completing the inspection and entering the information into the relevant national calculation methodology via the relevant Government Approved software.

Energy Efficiency Measure (EEM)

Planned work undertaken to improve the energy performance of a building by saving or generating energy.

Energy Performance Certificate (EPC)

An Energy Performance Certificate (EPC) refers to the lodged outcome of an inspection that has been undertaken by an energy assessor.

Heat Transfer Coefficient (HTC)

The Heat Transfer Coefficient (HTC), denoted measures the rate of heat transfer between inside and the outsides per degree difference in temperature, expressed in (, watts per metre square Kelvin.

National Calculation Methodology

The National Calculation Methodology (NCM) is a framework that is defined by the Health and Safety Executive (HSE) in collaboration with the Devolved Administrations. It provides a standardised method for calculating the annual energy use of a proposed building and comparing it with a 'Notional' building that meets specific energy performance criteria. This methodology is crucial for demonstrating compliance with the Building Regulations for domestic buildings and is used to produce Asset ratings for Energy Performance Certificates (EPCs).

Thermal Bridge

A point in an element or the building envelope that allows heat to pass through more easily.

Traditional Building

Buildings with a vapour permeable construction that both absorbs moisture and readily allows moisture to evaporate. Examples include but not limited to traditional timber-framed external walls with any infill and those built with wattle and daub, cob or stone, brick and constructions using lime render or mortar.

U Value

A measure of the thermal transmittance of a structure, as single material or a composite, in standard conditions. It is calculated by dividing the rate of transfer of heat through the structure by the difference in temperature across it, expressed in (, watts per metre square Kelvin.

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