

Version 1.0
July 2024

Energy Statement Checklist

Residential

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The following information is divided into 'must have' and 'nice to have'. If we don't have the 'nice to have' information, we will complete the assessment based on assumptions recommendations, which must then be agreed to and followed, or changed at a later date. Changing this information at a later date may affect the results and cause non-compliance if the actual items perform worse than the assumed items.

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Important information

Target for energy statement

This may be based on CO₂ reduction or reduction of energy use. Knowing the target will allow us to ensure the property is meeting requirements or provide advice if it isn't.

Preferred strategy

Knowing your preferred strategy for CO₂ or energy use reduction before carrying out the energy statement saves time. We can apply your ideas and make improvements to the design if necessary.

Local council and planning condition wording

We use these to double check the target and ensure the wording of our report will satisfy the planning condition.

SAP calculations

This information tells us how you are building your house, which enables us to work out if we can achieve the deduction.

Must have

1. Address

We need to know the location of the building to apply the correct regional climate data to the assessment.

2. Floor plans

We use these to determine the size and internal layout of the building.



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3. Elevations

We use these to measure glazing and doors.

4. Section drawings

We use these to measure internal floor to ceiling heights, and ensure we model the shape of the building correctly where there are vaulted ceilings or other complex aspects.

5. Site plan

We use this to determine the orientation of the building and if there is any shelter factor provided by surrounding buildings.

6. Build type

If full spec is unknown, we need to know the type of build (i.e. timber frame, partial fill 150mm cavity, etc) which will allow us to make reasonable assumptions and advise on insulation types/thickness required.

7. Type of ventilation system

The type of ventilation system will affect carbon emissions in the SAP assessment.

8. Type of heating system including control system, emitter type/s

The type of heating system plays a significant role in carbon emissions.

9. Number of light fittings



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10. Any secondary heating systems (such as wood burning stove)

Having a secondary system can take some of the burden off the main heating system. If the fuel used for the secondary heating system has a lower carbon intensity, then this can be beneficial to a SAP assessment.

11. Proposals for any renewable technologies which may be used to comply with planning conditions

If you let us know your scope for renewables, and preferred technology, we can add solar PV, air source heat pumps, or other renewable technologies into a SAP assessment, which will reduce/offsetting CO2 emissions where necessary, and help to comply with planning conditions.

12. Version of regulations (2013/2022)

Let us know which version of regulations the building needs to comply with so we can use the correct software to perform the calculation and measure the results against the correct criteria.

Nice to have

1. Build specification for all heat loss areas

This includes build-ups for all wall, floor and roof types which have heated internal space on one side, and unheated space on the other side. We use these to calculate the fabric heat loss of the building.

2. details including U-values and G-values (if known) of doors and glazing, including any glazed doors and roof lights

We use these to calculate the solar gains and fabric heat loss of the building.



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3. Make and model of ventilation system if system 3 or system 4 is proposed

The type and efficiency of ventilation system plays a role in carbon emissions. By providing us with the make and model, we can ensure that the most accurate data is used.

4. Make and model of heating system and any hot water cylinders (if applicable)

By providing us with the make and model, we can ensure that the most accurate data is used which will usually be advantageous over entering 'default' systems into the assessment.

5. Wattage and capacity (lm) of light bulbs used

If we don't have this information, we will complete the assessment based on recommendations, which must then be followed.

6. Details of any renewable technologies including orientation and output (kWp) of any solar PV panels

Knowing the finer details of proposed systems ensures we model the SAP accurately, without making any assumptions about what is or isn't feasible on-site.