



685. Sustainability & Climate Action - Carbon, Energy & Resources - Energy Efficiency Service & Inspection

Category:	Sustainability & Climate Action
Subcategory:	Carbon, Energy & Resources
Status:	Best Practice
Type:	Approved Contractor
Priority:	Recommended
Commonality:	Common

Note: This document provides guidance to support compliance but is not a substitute for professional advice.

Why This Task Matters

Your role in arranging professional energy efficiency inspections directly contributes to reducing costs and environmental impact, creating more sustainable learning spaces that protect pupil health and support educational continuity. By ensuring buildings are inspected by qualified experts, you demonstrate dedication to responsible resource management that builds confidence in the organisation's environmental stewardship and recognises the vital contribution facilities staff make to creating efficient, comfortable learning environments for current and future generations.

Task Summary

Best Practice: This task requires a qualified contractor to complete an annual energy efficiency inspection, reviewing building systems, insulation, and usage patterns. The inspection should include assessment of heating, ventilation, lighting, and electrical systems, identification of energy waste, and recommendations for improvements. Contractors should use appropriate diagnostic tools and follow established methodologies to ensure comprehensive coverage. The resulting report should provide clear findings, prioritised recommendations, and cost-benefit analysis for proposed improvements. This professional assessment supports the Climate Action Plan by identifying opportunities for energy

savings and carbon reduction while ensuring building systems operate efficiently and cost-effectively.

Relevant Legislation & Guidance

- **Energy Efficiency (Private Rented Property) (England and Wales) Regulations 2015:** Establishes minimum energy efficiency standards for buildings.
- **Climate Change Act 2008:** Supports energy efficiency improvements as part of carbon reduction strategies.
- **Building Regulations 2010:** Includes requirements for energy efficiency in building services.
- **DfE guidance on energy efficiency in schools:** Recommends regular professional inspections for educational buildings.
- **CIBSE (Chartered Institution of Building Services Engineers) guidance:** Provides best practice standards for building services inspection and energy efficiency assessment.

Typical Frequency

This task should be completed yearly, ideally during school holidays to minimise disruption. The frequency could vary based on building age, complexity of systems, and previous inspection findings. More frequent inspections might be needed for older buildings with multiple systems or if significant energy inefficiencies are identified. In education settings, annual inspections align with maintenance cycles and provide regular assurance of system performance.

Applicability

This task is recommended and common, applying to most schools and colleges with responsibility for building energy systems. It is particularly relevant for establishments with complex heating, ventilation, or electrical systems, though all educational buildings can benefit from professional energy efficiency assessments. The task applies regardless of building age, though older or larger facilities may derive greater value from annual inspections. Schools and colleges should consider this essential for maintaining efficient operations and meeting sustainability objectives.

Responsible Persons

- **Task Type:** This is an Approved Contractor task that requires specialist knowledge and equipment for comprehensive energy efficiency assessment.
- **Contractor Requirements:** The contractor should be qualified energy assessors or building services engineers with appropriate accreditations such as CIBSE membership, NICEIC registration, or equivalent professional qualifications. Cost estimates typically range from

£500-£2,000 depending on building size and complexity.

- **In-House Requirements:** Not applicable as this is an Approved Contractor task.
- **Permit to Work:** A permit to work may be required if the inspection involves accessing restricted areas, electrical systems, or roof spaces.
- **Delivery Model:** This task is normally contractor-delivered in most schools and colleges due to the specialist equipment and expertise required.

Key Considerations

Important factors include timing to avoid disruption to teaching, ensuring contractor access to all building areas, and budgeting for potential follow-up work identified during inspection. Consider the cost-benefit of recommendations and integration with planned maintenance schedules. The inspection should not cause significant disruption if properly coordinated with school activities. Risk assessment should consider the safety implications of accessing building systems and the potential for system downtime during testing.

Task Instructions

Prerequisites & Safety

- Ensure contractor has appropriate qualifications and insurance
- Arrange access to all building areas and systems
- Coordinate with school activities to minimise disruption
- Confirm permit to work requirements for restricted areas

Tools & Materials

- Energy efficiency assessment tools and equipment
- Building plans and system documentation
- Diagnostic instruments for electrical, heating, and ventilation systems
- Safety equipment for accessing restricted areas

Method (Step-by-Step)

1. **Planning and Access:** Arrange site access and coordinate with school staff for minimal disruption.

2. **Building Survey:** Conduct visual inspection of building fabric, insulation, and external elements.
3. **System Assessment:** Test and analyse heating, ventilation, lighting, and electrical systems.
4. **Energy Analysis:** Review energy usage patterns and identify inefficiencies.
5. **Recommendations:** Develop prioritised recommendations for improvements with cost-benefit analysis.
6. **Reporting:** Prepare comprehensive report with findings and recommendations.

Measurements & Acceptance Criteria

Inspections should follow established methodologies with clear measurement criteria for system efficiency. Recommendations should be prioritised based on potential energy savings and cost-effectiveness.

If Results Fail

Follow instructions on the Compliance Pod task completion form to record remedial/follow up actions and generate Reactive Task Tickets as required. If critical safety issues are identified, immediate actions should include making systems safe and arranging urgent repairs.

Reinstatement & Housekeeping

No reinstatement required. Ensure all access points are secured and areas left tidy.

Completion Checks

Confirm that comprehensive inspection has been completed, report received, and all evidence uploaded to Compliance Pod.

Client Oversight Checklist (Before the Visit)

- Scope of works covers all major building systems and energy-using equipment
- Contractor has access to building plans, energy bills, and usage data
- Contractor qualifications and insurance are verified
- Method statements confirm appropriate testing methodologies
- Access arrangements made for all areas including restricted spaces

Client Oversight Checklist (During the Visit)

- Contractor follows safe working practices and site procedures
- Key systems are properly tested including heating, ventilation, and lighting
- Sampling covers representative areas across the building
- Documentation of findings is thorough and photographic evidence captured
- Safety controls are maintained throughout the inspection

Deliverables & Acceptance Criteria (After the Visit)

- Comprehensive inspection report with detailed findings
- Prioritised recommendations with cost-benefit analysis
- Photographic evidence of key issues identified
- Certificates or reports for systems inspected
- Review report for completeness and technical accuracy

Defects & Follow-up

Follow instructions on the Compliance Pod task completion form to record remedial/follow up actions and generate Reactive Task Tickets as required. Agree priorities and timescales for implementing recommendations, and schedule any immediate safety-related repairs.

Reinstatement & Sign-off

Confirm systems returned to service, complete on-site sign-off, and upload evidence to Compliance Pod.

Record-Keeping & Evidence

- **Upload Process:** Upload any required statutory or supporting evidence to the corresponding task form in Compliance Pod.
- **Statutory Evidence:** No statutory evidence is required for this task.
- **Supporting/Good Practice Evidence:** Contractor inspection report, certificates, and remedial recommendations.

Common Pitfalls & Best Practice Tips

Common mistakes include inadequate site preparation causing incomplete inspections, failing to act on critical recommendations, or not coordinating with maintenance schedules. Best practices include providing contractors with historical data, implementing low-cost recommendations immediately, and tracking energy savings post-inspection. In educational settings, time inspections to inform budget

planning cycles. Warning signs include consistently poor energy performance despite regular inspections or lack of follow-through on recommendations.

Quick Reference Checklist

- ☐ Verify contractor qualifications and arrange access
- ☐ Provide building documentation and energy data
- ☐ Coordinate timing to minimise disruption
- ☐ Review inspection report upon completion
- ☐ Implement prioritised recommendations
- ☐ Upload evidence to Compliance Pod

Grouped Tasks

Grouping is feasible; align with related tasks of the same frequency and contractor visit.

Related Tasks

- Sustainability & Climate Action - Carbon, Energy & Resources - Energy Efficiency Visual Check
- Sustainability & Climate Action - Carbon, Energy & Resources - Carbon Emissions & Energy Use Monitoring
- Sustainability & Climate Action - Climate Risk & Adaptation - Overheating & Thermal Comfort Service & Inspection

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Users must ensure that all tasks are carried out in line with current legislation, manufacturer instructions, site-specific risk assessments, and organisational policies. Where necessary, professional advice should be sought from competent and accredited specialists — for example, fire risk assessors, water hygiene consultants, electrical engineers, gas safety contractors, or health and safety advisors.