



Energy Efficiency Verification Statement Template & Guidance

Residential Schemes Using SAP Route to compliance

1. Introduction

- 1.1. This document has been produced to provide some assistance in submitting as-built verification for the energy efficiency standards in new residential developments in accordance with Policies S6 and S7 of the 2023 Central Lincolnshire Local Plan.
- 1.2. This guidance has been designed so that the information needed for building regulations sign off can be used to discharge conditions at the point where the information would need to be produced anyway. By aligning these processes, it is the intention that this approach will not place any significant additional burden on applicants.
- 1.3. The verification documentation needs to set out:
 1. The proposed standards set out in the energy statement accompanying the application and approved and conditioned in the decision;
 2. The achieved standards in the built property;
 3. A direct comparison of the as-built efficiency standards to the standards approved in the permission; and
 4. The evidence necessary to demonstrate this.
- 1.4. It provides two versions of a template for submission of as-built verification to discharge conditions – one for cases where the standards approved have been met and one for cases where the full standards have not been achieved.

2. Energy Efficiency Verification Statement Template for schemes that have complied with the approved standards

2.1. It is recommended that the following template be used in submitting applications for discharge of conditions for schemes where the proposed standards set out in the approved energy statements have been fully achieved:

Table of compliance:

Plot no.	Design element	Proposed	Achieved	Ref to evidence ¹
1	Airtightness (m3/h/m2)			Part 18 of SAP report
	Ventilation System (e.g. type and efficiency percentage)			Part 19 of SAP report
	Walls U-Values (w/m2,K)			Part 9 of SAP report
	Ground floor U-Values (w/m2,K)			Part 11 of SAP report
	Roof U-Values (w/m2,K)			Part 10 of SAP report
	Windows and Doors U-Values (w/m2,K)			Part 12 of SAP report
	Heat supply system (e.g. type and flow temperature)			Part 24 of SAP report
	PV installed (number of storeys, and percentage of roof area covered with PV and orientation of PV)			Photo accompanying report?
	Standards Achieved?	Yes	No	
	Notes			
2	List design elements again...			
3	List design elements again...			

Conclusions

Conclusions should be provided to summarise the compliance and explain what has been achieved and what (if anything) has proven challenging. It may also be of benefit to include information about what has been learnt from the scheme and what might be implemented in further schemes as this will help the determining authority to consider future schemes.

Evidence of compliance

- SAP Report completed by a suitably qualified assessor.
- EPC for the property.
- Photographic evidence supplied as part of SAP assessment and additional to demonstrate PV coverage.
- Confirmation of the anticipated generation from renewables (such as PV) from the installer/supplier.
- Confirmation of information to be provided to the future owner or occupier of the dwelling to help them run the home efficiently.

¹ It may be necessary to adjust this to reflect the exact location of evidence being submitted.

3. Energy Efficiency Verification Statement Template for schemes that have failed to meet the approved standards

3.1. It is recommended that the following template be used in submitting applications for discharge of conditions for schemes that have not achieved the full standards. This includes cases where some of the proposed standards have not been achieved but the overall efficiency has been achieved:

Table of compliance:

Plot no.	Design element	Proposed	Achieved	Ref to evidence ²
1	Airtightness (m3/h/m2)			Part 18 of SAP report
	Ventilation System (e.g. type and efficiency percentage)			Part 19 of SAP report
	Walls U-Values (w/m2,K)			Part 9 of SAP report
	Ground floor U-Values (w/m2,K)			Part 11 of SAP report
	Roof U-Values (w/m2,K)			Part 10 of SAP report
	Windows and Doors U-Values (w/m2,K)			Part 12 of SAP report
	Heat supply system (e.g. type and flow temperature)			Part 24 of SAP report
	PV installed (number of storeys, and percentage of roof area covered with PV and orientation of PV)			Photo accompanying report?
	Standards Achieved?	Yes	No	
	Notes			
2	List design elements again...			
3	List design elements again...			

Conclusions

Conclusions should be provided to explain what has been achieved and where the proposed standards have not been met. This should include the extent to which the overall efficiency has not been achieved.

It should provide:

- An explanation of what the shortfall in overall energy efficiency and performance is;
- Information about why the shortfall has occurred taking into account the individual components set out in the table of compliance;
- Steps taken to resolve this shortfall on site and the up-to-date calculations with energy demand and energy generation on site;
- Possible resolutions to the shortfall that have not been pursued and justification for this;
- Details of any offsite offsetting proposed for the shortfall if applicable; and
- Details of what has been learned from this scheme and how it will be avoided in future schemes or plots.

² It may be necessary to adjust this to reflect the exact location of evidence being submitted.

For schemes involving multiple dwellings and where the Verification Statement has been submitted to discharge conditions on an early phase of dwellings, this should also include proposed steps to ensure the standards are achieved on future phases.

Supporting Verification Evidence

- SAP Report completed by a suitably qualified assessor.
- EPC for the property.
- Photographic evidence supplied as part of SAP assessment and additional to demonstrate PV coverage.
- Confirmation of the anticipated generation from renewables (such as PV) from the installer/supplier.
- Evidence of any steps taken to improve the performance of the building following the SAP assessment and an indication of the improvements this will have.
- Evidence of any offsetting proposed.
- Any evidence needed to justify not taking steps to improve efficiency (this may include cost information, detailed specifications, photographs, or other information as needed).
- Confirmation of information to be provided to the future owner or occupier of the dwelling to help them run the home efficiently.