

RISE

Retrofit information,
support & expertise

Managing expired domestic EPC surveys and retrofit assessments

Supply chain advice pack

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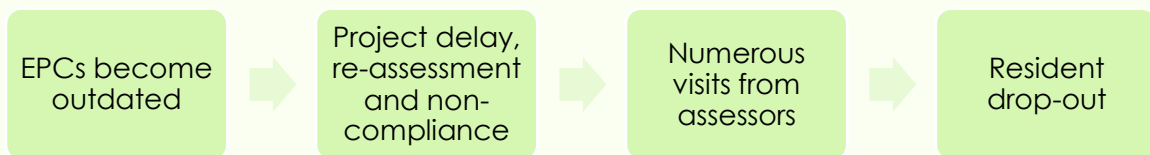
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Introduction

Domestic EPCs and retrofit assessments underpin almost every stage of planning, compliance, and delivery in the domestic retrofit supply chain. A current EPC provides the baseline energy performance of a home, which is essential for funding applications, project scoping, and demonstrating improvements. Retrofit assessments, under PAS 2035, offer a deeper understanding of the property's condition, ventilation, occupancy patterns, and upgrade needs. To learn more around the difference you can read our other advice packs 'best practice retrofit assessments' and 'RdSAP changes for the supply chain'.

When EPCs expire or assessments become outdated, this risks delays, re-assessing costs, inaccurate planning, and noncompliance with schemes such as Warm Homes: Social Housing Fund Wave 3 and Local Grant (WH:SHF- and LG). It can be irritating to residents and risks drop-outs due to visit fatigue resulting from additional on-site surveys.

This advice pack aims to provide useful, concise information, for supply chain organisations involved in the delivery or use of EPC and retrofit assessments, about understanding and managing the risks associated with old or expired assessments.



Expiration periods

Assessment/Survey	Validity
Retrofit assessment	No fixed expiry timeline but, in practice, around 2 years old is regarded as out-of-date. A retrofit assessment may become “outdated” when the manner the home is used is changed, for example when children move out the house.
EPC Survey	10 years from assessment date.
Stock condition survey	No fixed expiry, standard practice is 5 years .

The risks of expired domestic EPCs

- **Non-compliance with funding requirements** Many schemes require EPCs no older than 10 years—and often much newer.
- **Inaccurate property data** Outdated EPCs may not reflect upgrades done to the home inbetween assessment and present day (e.g., insulation, heating systems).
- **New assessments using RdSAP 10** May produce different EPC outputs from earlier assessments done in previous iterations of RdSAP leading to changes in projects scope.
- **Delays in retrofit projects** Works cannot be scoped or validated without current assessments.
- **Inability to evidence carbon savings** Baseline, accurate EPC data is essential for measuring improvement.
- **Tenant communication challenges** Outdated information can undermine trust and clarity for communications with tenants.

Identifying and prioritising expired EPCs

Typically a social housing landlord will have a central EPC register for capturing key details such as the rating, expiry date, assessor information, and recommendations. Many organisations choose to refresh EPCs after seven or eight years rather than waiting for the full ten, ensuring that data remains relevant for funding and planning.

If properties have been in replacement boiler or replacement windows programmes then this should trigger a new EPC so that the SAP point improvement is reflected in the EPC register.

With a register in place, properties can be prioritised for retrofit works. Homes with low EPC ratings, and properties housing vulnerable tenants should be addressed first. It's also important to coordinate responsibilities with landlords or housing providers where roles overlap. Grouping EPC surveys geographically can reduce travel time and cost, making the process more efficient.

Useful prioritisation triggers include:

- EPC rating of E, F or G
- Properties targeted for funding bids
- Hard-to-treat archetypes
- Homes with vulnerable occupants

Managing retrofit assessments

Retrofit assessments are more detailed than EPCs and are required for PAS 2035 compliant retrofit projects.

Key components of a retrofit assessment:

- **Occupancy assessment:** An evaluation of how residents use the home, including heating patterns, fuel consumption, specific comfort needs, and potential limitations to ensure improvements are suitable.
- **Condition report:** A detailed technical survey inspecting the building's existing structure, including construction type, defects, moisture risk, and insulation levels.
- **Energy report:** A comprehensive analysis of the building's current energy performance, using RdSAP.
- **Ventilation review:** An assessment of current air permeability and ventilation systems.

- **Contextual evaluation:** Identification of site-specific factors like exposure to weather (wind/rain), orientation for solar gains, and, *for older buildings, a heritage significance statement.*

The impact of RdSAP 10 on managing expired EPCs and retrofit assessments

Domestic EPC surveys

More EPCs require full re-survey

RdSAP 10 introduces a new calculation engine and expanded evidence requirements. This means expired EPCs cannot be refreshed or reused—they must be fully re-surveyed using the new methodology.

Longer, more detailed assessments

Surveyors must capture more granular data (e.g., glazing specifics, insulation types, heating system evidence). This increases survey duration, complexity, and resource planning needs.

Potential rating changes

Because assumptions are reduced and evidence is prioritised, **EPC ratings may shift**. This can affect:

- Compliance
- Funding eligibility
- Asset management decisions

Operational Implications:

- Increased survey backlog risk
- Need for updated data systems
- More rigorous quality assurance

PAS 2035 retrofit assessments

New baselines for retrofit modelling

Retrofit assessments rely on EPC data. With RdSAP 10's new methodology, previous EPC-based energy modelling becomes outdated and will need re-running.

More accurate pre-retrofit data

The improved evidence hierarchy and reduced assumptions create a more reliable starting point for:

- Heat loss calculations

- Energy saving predictions
- Measure selection and sequencing

Workflow and compliance changes

Retrofit Assessors and Coordinators must:

- Update templates and processes
- Re-train on new data requirements
- Ensure RdSAP 10 EPCs underpin all new retrofit pathways

Funding and prioritisation impacts

Because EPC ratings influence eligibility for many schemes, use of RdSAP 10 may change:

- Which homes qualify
- Which homes are prioritised
- Expected carbon/energy savings


RdSAP 10 introduces more detailed, evidence-based EPCs, requiring full re-surveys of expired certificates and recalibration of retrofit assessments to ensure compliance, accuracy, and reliable modelling. In practice, a PAS 2035 Retrofit Assessment is generally considered valid for 2 years. After 24 months, it is normally treated as out of date and must be reviewed or fully redone, depending on what has changed in the dwelling or in the PAS standard.

This 2-year expectation is widely used by TrustMark-registered providers, scheme operators, and retrofit coordinators, even though PAS 2035 itself does not specify an explicit expiry period.

Actions for supply chain businesses

- Verifying that Retrofit Assessors are qualified and registered with TrustMark.
- Aligning assessments with project timelines. Avoid expired assessments delaying installation phases.
- Using assessments to build accurate retrofit plans. This supports:
 - Material procurement
 - Labour scheduling
 - Cost forecasting
 - Risk management

Practical tips for supply chain leaders



Integrating EPC and retrofit assessment tracking into existing workflow or asset management systems helps maintain visibility across large portfolios. Field teams—such as engineers, surveyors, and installers—can be trained to identify outdated EPCs or missing assessment data during routine visits, allowing issues to be flagged early.

Combining retrofit or EPC assessments with other scheduled visits, such as a boiler service or stock condition surveys, reduces disruption for tenants and improves efficiency. Standardising data capture across assessors and contractors ensures consistency, which is particularly important when working across multiple funding streams or local authority areas.

From a commercial perspective, strong EPC and retrofit data management can enhance tender submissions by demonstrating readiness and compliance. Collaboration with housing providers also helps avoid duplication and ensures that responsibilities for commissioning assessments are clearly understood.

Building a long-term strategy

A proactive strategy will ensure that EPCs and retrofit assessments remain current and useful. Many organisations adopt a rolling renewal programme, refreshing EPCs well before expiry to maintain alignment with funding requirements. Embedding PAS 2035 principles into internal processes helps create consistency across projects and reduces the risk of non-compliance.

Developing a property archetype library can streamline assessments by identifying common characteristics and challenges across similar homes. A data driven retrofit roadmap supports multiyear planning, investment decisions, and resource allocation. Clear roles and responsibilities across the supply chain prevent confusion and ensure that assessments are commissioned at the right time.

Useful templates

- EPC & Retrofit Assessment Register
- EPC Expiry Tracker
- PAS 2035 Assessment Checklist
- Retrofit Project Readiness Form
- Tenant Communication Template
- Assessor Competency Verification Form

Summary

A well managed approach ensures that EPCs and retrofit assessments are always up to date, with no expired certificates affecting active projects. Processes align with PAS 2035, assessments are coordinated efficiently, and data is used effectively to plan works, secure funding, and demonstrate improvements. Ultimately, this leads to smoother project delivery, reduced delays, and stronger support for housing providers' net zero ambitions.

Resources



Podcast: All RISE podcasts are available [here](#).

Retrofit Evaluation podcast: "Government funded retrofit evaluation" available [here](#).



Masterclass: All RISE masterclasses are available [here](#).

RdSAP10 masterclass "Navigating RdSAP10" available [here](#).



Advice pack: All RISE advice packs available [here](#).

Retrofit assessment advice pack: "Best practice retrofit assessment" available [\(here\)](#).

