
SELF-ASSESSMENT WORKSHEET

PAS 2030:2023 — Retrofit Installation

Work through each clause, record what you do today, rate where you are and agree the actions that close the gap.

ORGANISATION

COMPLETED BY

DATE

How to rate: 0 = nothing in place 1 = partly in place 2 = in place, little evidence 3 = in place and evidenced
Fill in on screen or print. Always work from the current published standard.

How to complete this worksheet

- 1 Get the right people together**
Ask the person who runs each area to help. Allow 1–2 hours per sitting; you don't have to finish in one go.
- 2 Read each clause and the evidence prompt**
The grey box tells you what an auditor will look for. The examples underneath show the kind of records that count.
- 3 Write what you actually do today**
Describe the real practice, not what you'd like to happen. Name the document, system or record and where it's kept, e.g. 'Training matrix — SharePoint/HR, updated monthly'.
- 4 Rate honestly from 0 to 3**
0 nothing in place · 1 partly in place or informal · 2 in place but little written proof · 3 in place, followed and evidenced with records. If you can't show it, it isn't a 3.
- 5 Agree actions, owners and due dates**
For anything rated 0–2, write the next practical step, who will do it and by when. Small, specific actions get done.
- 6 Summarise and review**
List your top three priorities on the final page. Revisit the worksheet every few months to track progress.

What counts as good evidence?

- Good evidence is current, approved, dated and actually used — a policy nobody follows isn't evidence.
- Records beat documents: a completed checklist proves more than the procedure that describes it.
- Photos, screenshots, emails and system exports all count if they show the activity happening.
- Leave a box blank rather than guess — blanks show you where to look first.

SCOPE

What PAS 2030 covers

PAS 2030:2023 sets requirements for installing energy efficiency measures in existing homes, under the PAS 2035 retrofit framework.

Evidence to look for: Installers must be certified for each measure type they install.

Examples of suitable evidence

- ✓ Copy of the current PAS 2030:2023 standard
- ✓ Copy of PAS 2035 referenced by the installation management system
- ✓ Documented list of energy efficiency measures covered by company certification
- ✓ Company scope statement covering installations in existing homes

What we do today / evidence we hold**Actions to close the gap**

Owner

Due

Rating

☐ 0

☐ 1

☐ 2

☐ 3

MANAGEMENT

Installer management system

Installers need a documented system covering competence, subcontractor control, complaints, records and continual improvement.

Evidence to look for: A quality manual, training matrix and complaints log.

Examples of suitable evidence

- ✓ Installation management manual covering competence, records and subcontractor control
- ✓ Approved subcontractor register with qualification and insurance checks
- ✓ Complaints log showing investigations, responses and completed corrective actions
- ✓ Management review minutes recording performance trends and agreed improvement actions

What we do today / evidence we hold**Actions to close the gap**

Owner

Due

Rating

☐ 0

☐ 1

☐ 2

☐ 3

COMPETENCE

Qualified operatives

Everyone installing a measure must hold the relevant qualifications and be supervised appropriately.

Evidence to look for: Qualification certificates on file for each operative and measure.

Examples of suitable evidence

- ✓ Operative competence matrix showing approved measures and qualification expiry dates
- ✓ Copies of installers' relevant trade qualifications and measure-specific training certificates
- ✓ Site supervision records identifying supervisors and operatives supervised
- ✓ Practical competence assessment records signed by the assessor

What we do today / evidence we hold**Actions to close the gap****Owner**

Due

Rating
☐ 0

☐ 1

☐ 2

☐ 3

PRE-INSTALLATION

Survey and design

Before work starts, review the retrofit design, survey the property and confirm the measure is suitable.

Evidence to look for: Pre-installation building inspection records.

Examples of suitable evidence

- ✓ Signed retrofit design review confirming suitability before installation starts
- ✓ Property survey report recording dimensions, construction and existing defects
- ✓ Pre-installation photographs showing damp, ventilation openings and access restrictions
- ✓ Recorded design queries and retrofit designer approvals before work starts

What we do today / evidence we hold**Actions to close the gap****Owner**

Due

Rating
☐ 0

☐ 1

☐ 2

☐ 3

INSTALLATION**Doing the work**

Install to the Annex for each measure (insulation, heating, glazing, renewables), manage moisture and ventilation risks and protect the property.

Evidence to look for: Photographs, checklists and measure-specific records.

Examples of suitable evidence

- ✓ Completed installation checklist referencing the applicable measure annex
- ✓ Dated installation photographs showing insulation continuity and sealed junctions
- ✓ Site inspection records confirming moisture controls and unobstructed ventilation openings
- ✓ Property protection checklist with photographs of floor coverings and protected belongings

What we do today / evidence we hold**Actions to close the gap**

Owner		Due		Rating	0	1	2	3
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HANDOVER**Commissioning and handover**

Commission, inspect and hand over with guidance, warranties and certificates to the householder.

Evidence to look for: Handover packs and signed completion records.

Examples of suitable evidence

- ✓ Completed commissioning sheets recording test results and installer signatures
- ✓ Final inspection report confirming defects were corrected before handover
- ✓ Householder handover pack containing operating instructions, maintenance guidance and warranties
- ✓ Signed handover receipt listing certificates supplied and controls demonstrated

What we do today / evidence we hold**Actions to close the gap**

Owner		Due		Rating	0	1	2	3
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ANNEXES

Measure-specific requirements

Annexes give detailed rules for each type of energy efficiency measure.

Evidence to look for: Check the correct annex for every measure you are certified for.

Examples of suitable evidence

- ✓ Measure-specific compliance checklist mapped to the relevant PAS 2030 annex
- ✓ External wall insulation inspection records showing fixings and weatherproof detailing
- ✓ Cavity wall insulation records showing suitability checks and installed material quantities
- ✓ Loft insulation photographs showing depth markers and clear eaves ventilation

What we do today / evidence we hold

Actions to close the gap

Owner		Due		Rating	0	1	2	3
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Summary and next steps

Top three priorities

Resources or support needed

Target date for certification or review

Want a second pair of eyes?

Send your completed worksheet to our success team for a free review call.

success@isology.co.uk · www.isology.co.uk/contact