
SELF-ASSESSMENT WORKSHEET

PAS 2035:2023 — Whole-Dwelling Retrofit

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 2035 covers

PAS 2035:2023 is the whole-house framework for domestic retrofit — how projects are assessed, designed, installed, monitored and evaluated.

Evidence to look for: Required for government-funded schemes such as ECO and many grant schemes.

Examples of suitable evidence

- ✓ Copy of PAS 2035:2023, including current amendments
- ✓ Company guidance summarising PAS 2035 scope
- ✓ Staff briefing slides explaining whole-house retrofit
- ✓ Reference sheet listing applicable retrofit standards

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

Due

Rating
☐ 0

☐ 1

☐ 2

☐ 3

ROLES

Retrofit roles

Defines the Retrofit Assessor, Coordinator, Designer, Installer and Evaluator, and what each is responsible for.

Evidence to look for: Every project names a Retrofit Coordinator accountable from start to finish.

Examples of suitable evidence

- ✓ Project responsibility matrix naming each retrofit role
- ✓ Signed appointment letters for the Retrofit Coordinator and Designer
- ✓ Training and qualification records for appointed retrofit professionals
- ✓ Meeting minutes recording responsibilities and agreed project handovers

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

Due

Rating
☐ 0

☐ 1

☐ 2

☐ 3

RISK**Risk pathways A, B and C**

Each project is assigned a risk pathway based on building and measures; higher risk needs more expert design and evaluation.

Evidence to look for: Record the pathway decision and reasoning.

Examples of suitable evidence

- ✓ Dwelling risk assessment recording building characteristics and proposed measures
- ✓ Retrofit Coordinator review notes identifying technical risks
- ✓ Moisture risk assessment for proposed insulation measures
- ✓ Design review minutes recording specialist advice and agreed safeguards

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

Owner		Due		Rating	0	1	2	3
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ASSESSMENT**Retrofit assessment**

Survey the dwelling's condition, occupancy, energy performance and ventilation before deciding measures.

Evidence to look for: A completed retrofit assessment report.

Examples of suitable evidence

- ✓ Completed dwelling condition survey with dated photographs
- ✓ Occupancy assessment recording household needs and heating patterns
- ✓ Energy assessment report with calculation inputs
- ✓ Ventilation assessment recording existing fans, vents and airflow measurements

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

Owner		Due		Rating	0	1	2	3
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PLANNING

Medium-term improvement plan

Plan measures in the right order over time so later improvements are not compromised.

Evidence to look for: A medium-term improvement plan shared with the householder.

Examples of suitable evidence

- ✓ Dwelling medium-term improvement plan showing recommended measures
- ✓ Sequencing schedule explaining dependencies between proposed improvements
- ✓ Options appraisal recording costs, benefits and practical constraints
- ✓ Client meeting minutes recording discussion of the improvement plan

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

Due

Rating

0

1

2

3

DESIGN

Design and installation

Measures are designed as a whole house, with ventilation and moisture risks addressed, then installed under PAS 2030.

Evidence to look for: Design documents and ventilation strategy.

Examples of suitable evidence

- ✓ Coordinated retrofit drawings showing insulation continuity and ventilation provision
- ✓ Moisture assessment report supporting the insulation design
- ✓ PAS 2030 installation inspection records with dated site photographs
- ✓ Ventilation commissioning certificate recording measured airflow rates

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

Due

Rating

0

1

2

3

EVALUATION

Monitoring and evaluation

After completion, check that measures perform and occupants are satisfied; carry out further evaluation on higher-risk projects.

Evidence to look for: Post-installation surveys and evaluation reports.

Examples of suitable evidence

- ✓ Completed basic evaluation questionnaire recording occupant satisfaction and reported problems
- ✓ Post-installation energy monitoring log with recorded meter readings
- ✓ Further evaluation report investigating identified performance concerns
- ✓ Corrective action log recording defects, remedial work and follow-up checks

What we do today / evidence we hold

Actions to close the gap

Owner		Due		Rating					
					0	1	2	3	

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