

## Epsom and Ewell Boiler Upgrade Grant - Customer FAQs

[www.actionsurrey.org](http://www.actionsurrey.org)

### What is the Epsom and Ewell Boiler Upgrade Grant project?

Epsom and Ewell Borough Council are providing grant funding to support residents in fuel poverty whose boiler has broken down, is at the end of its life (more than 10- 15 years old or not A rated) or is uneconomical to repair, with a new replacement A-grade efficiency gas boiler. Where the boiler can be economically repaired, the funding can also be utilised for this. In addition, during the application stage the resident may have the option to be referred to other services such as other grant funded work.

### Who are Action Surrey?

We are an impartial energy advice service set up by Surrey's local authorities and Surrey County Council to help residents make their homes more energy efficient. Action Surrey has a network of trusted installers.

Action Surrey is managed by ThamesWey Sustainable Communities, a company wholly owned by Woking Borough Council.

### How much funding is available and is the customer expected to pay anything?

Funding is intended to cover the whole installation of a new gas boiler or its repair including all surveys. There is no financial contribution or deposit expected from owner-occupiers taking part in the EEBUG project. Funding is always subject to eligibility, survey and quote. Action Surrey can not guarantee any funding allocation or installation specially if the works are out of the scope of this project.

### What about the private rented sector or Park Homes?

Unfortunately this grant is only for owner occupiers. Owner occupiers in housing association or shared ownership will be assessed on a case by case, as will Park Homes.

### How long is the funding available for?

Installations **must be complete before the 31<sup>st</sup> March 2025**. Works carried out after this date will be ineligible for funding, unless an official extension is granted by Epsom and Ewell Borough Council. Nevertheless we would encourage residents to apply promptly since funding is very limited.

### How do I contact Action Surrey?

Contact us either by phone **0800 783 2503**, by email at [info@actionsurrey.org](mailto:info@actionsurrey.org), or complete an online enquiry form on the Action Surrey website - [www.actionsurrey.org/enquiries](http://www.actionsurrey.org/enquiries). Advisors can assist if you are unsure about your eligibility or documentation to provide. *Please note that the team cannot determine eligibility over the phone.*

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## What documents are customers required to sign/provide?

Before installation:

1. Application form completed in full and signed customer commitment section.
2. Evidence of income/benefits declared in the application form to evidence eligibility.
3. Proof of Address.

After installation:

4. Customer Completion Certificate

## How do I apply?

The application form can be downloaded from our website here: [www.actionsurrey.org](http://www.actionsurrey.org)

Submit this through the customer portal on our website: <http://www.actionsurrey.org/>, or by email to [info@actionsurrey.org](mailto:info@actionsurrey.org), along with supporting evidence, as indicated on the form. In addition if a resident is not able to submit documentation online, a postal pack can be requested by phone.

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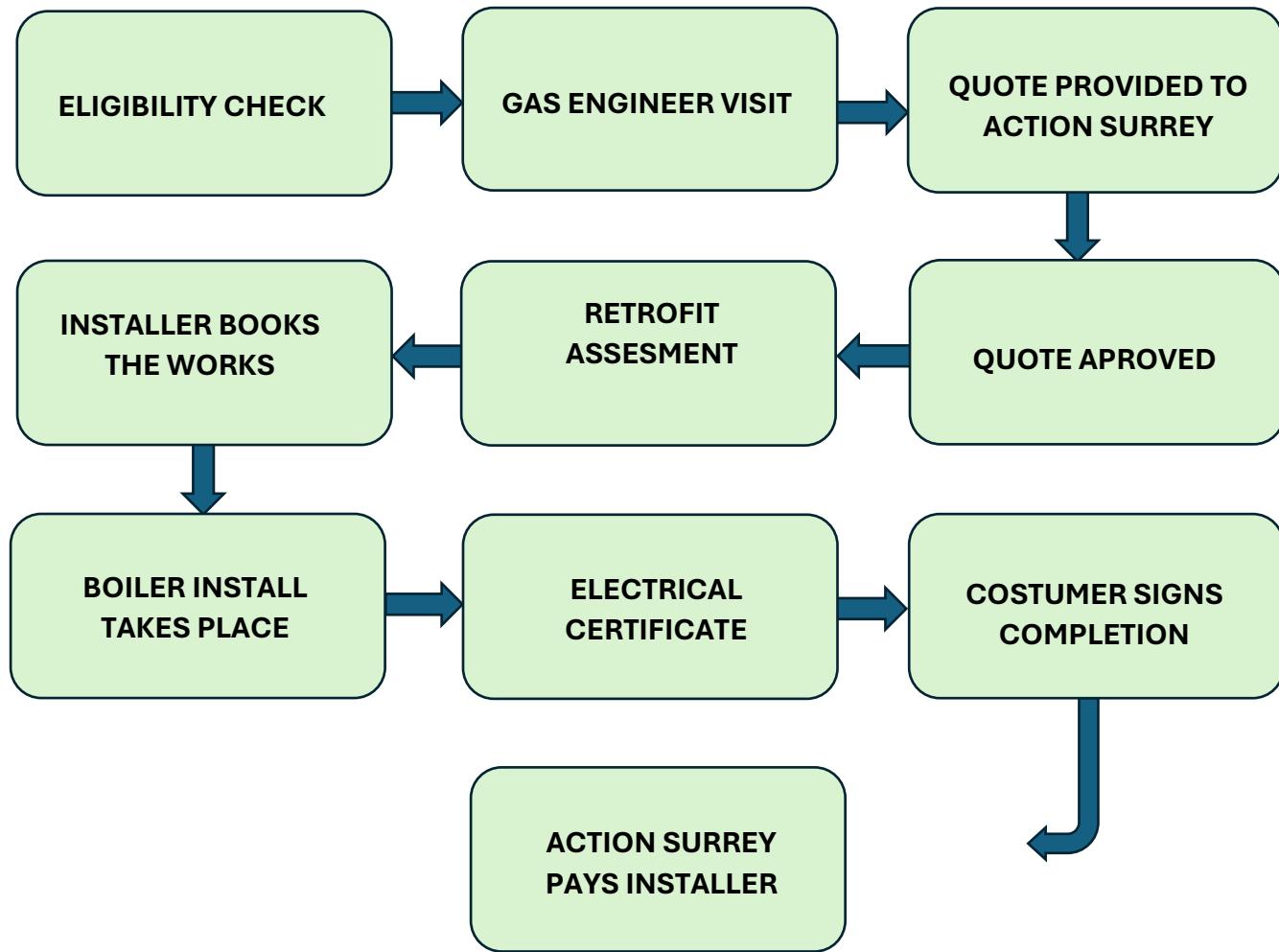
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## What is the Process?



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## Stage 1: Eligibility Check:

1. Fill out an application form with all your supporting documents. The team will review this and be in touch to confirm financial verification or inform if further evidence is needed.
2. Action Surrey can explain the scheme and discuss the grant information if you wish to have further information. Contact the team at **0800 783 2503** or via the website.
3. Eligibility for funding is dependent on two aspects:
  - A) the current energy efficiency rating of your home: An Energy Performance Certificate rating of D, E, F or G.

**FAQ - What do I do if my property does not have an Energy Performance Certificate (EPC) or it is out of date?**

If a property does not have a valid EPC (e.g. non-existent, expired, or inaccurate), the customer will need to have a pre-installation EPC carried out. If required, this will be carried out during the Retrofit Assessment. The property will only be referred for the Retrofit Assessment once financial eligibility has been fully verified and a gas engineer has stated viability for a new boiler replacement. Action Surrey reserves the right to withdraw application if the EPC of the property is higher than D or suspects it is very likely for it.

### AND

- B) household financial criteria: Applications must prove **one** of the following:
- A household occupant is in receipt of **means-tested benefits** (Table 5).
  - A **gross** annual **household** income of less than £36,000 **before** tax/NI deductions. Disability benefits may be discounted but will need to still provide proof of these.
  - A **gross** annual **household** income below £20,000 after housing costs deducted (annual mortgage, gas and electric energy bills and council tax payments).
  - Referral from a charity or public service (e.g. health/social care) where **low-income status has already been determined** by these services.

*Table 5: Means-tested benefits that auto-qualify a household's financial eligibility.*

Universal Credit	Council Tax Reduction/Support Benefit ( <u>not</u> Single Occupancy or other discount)
Income Related Employment & Support Allowance	Income-Based Jobseeker's Allowance
Income Support	Housing Benefit
Pension Credit	Cold Weather Payment
Child Tax Credits	Working Tax Credits

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**FAQ - How is the £36,000 income calculated?**

- This is the total income for **all adults over 18 years of age** living in the property.
- Benefit payments, salaries, self-employed income, lodger rent payments, dividends, shares and investments are all income that counts towards the threshold, and must be declared accurately. Some disability benefits may be discounted but will still need to be provided.
- Where lodgers are present, rent paid is counted towards household income and the lodger must be listed on the application, but income they receive is not counted. A rental agreement must be provided.
- Other discounted adults whose income does not count include:
  - Full time university students.
  - Adult dependents residing in a property for care.
  - Those in prison.

***Discounted adults must still be listed on the income declaration and evidence provided (e.g., student***

4. Customers will be asked to provide the relevant evidence to qualify under the criteria:
  - a) To qualify with means-tested benefits, receipt is evidenced by a valid, recent means-tested benefits letter/certificate. Online PDFs from official sources can be accepted provided they are shown in full and include the recipient's name, address and date.
  - b) To qualify under the income threshold of £36,000 gross annual income, the following must be provided where applicable:
    - 3 months of PAYE slips (more may be requested where pay is variable)
    - State pension letter and P60 pension statement(s)
    - Benefits certificate(s)
    - SA302 & Tax Overview (for self-employed income)
    - Rental agreement showing lodger payments
    - Dividends/investments statement
    - Proof of address such council tax bill, recent energy bill or Benefit letter.

We may require bank statements where the above cannot be provided or nil income is declared.

- c) To qualify under the housing cost consideration criteria, the above documents must be provided to determine gross household income, in addition to a mortgage statement energy bills ( Gas and electric only ) and council tax bills, matching the address of the application.

***For sole occupiers: applications must be supported by the most recent Council Tax Bill for as Proof of Address.***

***Utility bills can be used as proof of address where there is more than one adult residing in the property, or the property is situated in an auto-eligible postcode area.***

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*Land registry information must also match the application to prove owner-occupier status. By signing the customer commitment form, the customer is stating they are the named owner of the property and consent to a land registry check at any stage.*

5. Existing Solar PV or Solar Thermal arrays cannot be repaired, replaced or extended.
6. The dwelling must be situated within Epsom and Ewell Borough Council
7. Action Surrey will confirm the customer's permission to pass their details on to an installer and/or surveyor.
8. As per government requirements, all customers will be provided with a Privacy Notice to explain the collection and usage of personal data. A copy of the Privacy Policy can be found on the Action Surrey website.
9. A signature is required on the application form (this can be electronically generated).

**FAQ - How do I provide the relevant documentation?**

Documents will have to be provided either by email or post.

**FAQ – I don't have use of a computer to go online, how do I provide the information to Action Surrey?**

Action Surrey is happy for customers to ask a family member or friend to help with providing the documentation online. Alternatively, Action Surrey can arrange for paper copies of the relevant documents to be sent to the customer's address for completing and returning by post, with photocopies of evidence.

Postal documents must be returned to Action Surrey within 10 days. Action Surrey cannot accept liability for any documents lost or damaged in the post.

10. Should the customer be an employee or councillor of a Local Authority within Surrey, including Surrey County Council, an employee or director of ThamesWey Sustainable Communities, or a close family member of any of the aforementioned groups, this must be declared to Action Surrey prior to the acceptance of a grant.

**Stage 2: Home Retrofit Survey:**

11. Once Action Surrey determines a customer's eligibility for the scheme, the customer will be referred to installer(s) on the network.
12. Following referral, the installer will contact the customer to arrange a date for an initial survey made by a gas engineer. If this first survey confirms that a gas boiler is needed for replacement or repair and the cost is under the funding scope of the project, a retrofit survey will go ahead. This

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survey will be carried out by a qualified Retrofit Assessor. The installer is required to attempt contact with the customer a minimum of three times. If this is unsuccessful, the application may be cancelled.

13. Following the retrofit assessment, a Retrofit Co-ordinator will produce a plan of works for the property.
14. Other essential works will be detailed on the quote(s) and will be covered by the funding (where the funding limit is not exceeded).

### **Stage 3: Funding Approval:**

15. Action Surrey will submit the proposed works and costings to Epsom and Ewell Borough for funding approval.
16. Once approved, Action Surrey will contact the customer to confirm the quotation can be funded. The Installer is notified to arrange an installation date with the customer.
17. The installer(s) will carry out the works as detailed on the quote(s).

### **Stage 4: Installation and Completion**

18. Once works have been installed, the customer will be asked to complete a Customer Completion Certificate (example provided in appendix 1). Any reason for not returning the form must be identified to Action Surrey within the timeframe stated. Upon receipt of the certificate or elapse of the timeframe with no valid reason for not returning the form, Action Surrey will arrange payment of the cost of the work to the installer. The customer will not be required to pay any of the quoted costs to the installer, except where the customer has requested private works.

#### **FAQ - How are the installers chosen? Can I ask an installer of my choice to carry out the work?**

The installers on the Action Surrey network are TrustMark Registered and MCS accredited for renewable technologies. They are all certified to PAS2030:2019 as per the conditions of the grant. All the installers have undergone a rigorous due diligence process prior to onboarding.

To be eligible for the funding, one of the installers on the Action Surrey network must be used. Action Surrey reserves the right to select installers for referral based on measures offered, performance and capacity.

19. Guarantees will be provided by the installer for all measure installations. Where applicable, the Customer will receive instructions, handover, maintenance information, workmanship and manufacturer warranties, and an MCS certificate for renewables.
20. Action Surrey will arrange payment to the installer for the works.

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21. Customers may be asked to be a case study, allowing Action Surrey to quote the customer's feedback and allow/provide photographs to be taken of the installation process and finished installation. Action Surrey reserves the right to use this case study for promotional purposes subject to obligations imposed by the GDPR and DPA 2018.

#### FAQ – What “other essential works” might be required?

- Boiler installation may require some type of ventilation to create an escape for byproduct emissions. The flue may need to be restructured if needed.
- Extra pipe working and plumbing works may also be needed.
- An electrician will have to sign off the works at the end of the installation to be compliant with current regulations.

Disruption of any essential works will be minimal and far outweighed by long-term benefits.

#### FAQ – What happens if I am not happy with the work that has been done?

If there are any concerns regarding the works, customers should raise them directly with the installer. It is the installer's responsibility to resolve any complaints received, in line with their complaints policy.

If a concern or complaint cannot be resolved between the customer and the installer, the customer should file a complaints form with Action Surrey, who may choose to appoint an independent surveyor to help resolve a dispute if necessary. Payment to the installer will be withheld during this process and the decision of the surveyor will be final.

## Additional advice

Action Surrey will be available to answer customer questions throughout the process. Customers can also contact their local authority, or BEIS, for reassurance of the project's legitimacy.

Epsom & Ewell Borough Council

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## Appendix 1 - Customer Completion Certificate

I confirm that the works undertaken by the Installer have been completed to a satisfactory standard.

I understand that I will be liable to pay for any additional works I request the installer to carry out that are not eligible for funding under this grant project.

I understand that in the event of complaint about the works I need to contact the Installer and not Action Surrey (ThamesWey Sustainable Communities Limited), whose role in this scheme is limited to referring a Customer to an Installer and distributing funding paid to it by the Government under the Home Upgrade Grant Phase 2 scheme.

I accept that I have no contractual relationship with ThamesWey Sustainable Communities Limited or Surrey County Council.

***In the absence of receiving this signed form, or notification from the Customer that an ongoing query with the installer exists within 5 calendar days of completion, Action Surrey will make payment to the installer.***

FULL NAME OF CUSTOMER:

.....

MEASURE(S) INSTALLED:

.....

FULL ADDRESS OF PROPERTY WHERE WORKS HAVE BEEN UNDERTAKEN:

.....

.....

.....

SIGNATURE: ..... DATE: .....

Feedback (optional):

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