

## Sustainable Warmth Grant - Customer FAQs

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

### What is the project?

This grant project aims to support low-income, hard to heat properties across Surrey, considered to be fuel poor, or at imminent risk of fuel poverty. Sustainable Warmth (SW) combines the third phase of the Green Homes Grant Local Authority Delivery scheme (LAD3) with the first phase of the Home Upgrade Grant (HUG1). This splits the project into on-gas properties and off-gas properties, respectively. Sustainable Warmth is being run by Action Surrey on behalf of 11 of the Boroughs & Districts across Surrey and the Cambridge & Peterborough Combined Authority (CPCA). Funding for this project is available through UK Government's Green Homes Grant scheme.

### What is Action Surrey?

An impartial energy advice service set up by Surrey's local authorities and Surrey County Council to help residents make their homes more efficient and save money on their energy bills. 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?

£10,000 per property is available for eligible on-gas households.

Funding for off-gas properties varies on a sliding scale between £10,000 and £25,000, dependent on pre-EPC rating and fuel type used for heating the property (see Table 1).

These funding amounts are averaged across the project\*. There is no financial contribution expected from owner-occupiers. There is also no need for a customer to pay any deposits.

Table 1: Off-gas (HUG1) funding scale.

	F&G	E	D
<b>Electric</b>	£20,000	£15,000	£10,000
	F&G	E	D
<b>Off-Gas Grid Fossil Fuel (oil, LPG, coal)</b>	£25,000	£20,000	£15,000
<b>Park Homes (off the mains gas grid)</b>	£15,000		

\*Funding allocated is dependent on survey results, viability of installation and value for money, and is therefore at the discretion of ThamesWey Sustainable Communities Ltd. Properties are not automatically entitled to a specific funding amount, it is entirely dependent on the works that are viable and the associated costs.

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### What about the private rented sector – do landlords need to pay anything?

For the private rented sector, tenants must meet the low-income criteria and landlords will be required to make a minimum contribution of one third of the total cost of works. Funding for on-gas private-rented properties cannot exceed £5,000 per property (see Table 2).

Table 2: On-gas (LAD3) private-rented cost expectations.

LAD Phase 3 Funding	Minimum Landlord Contribution	Total Cost
£1,000	£500	£1,500
£2,000	£1,000	£3,000
£3,000	£1,500	£4,500
£4,000	£2,000	£6,000
£5,000	£2,500	£7,500

Should the total cost of works exceed £7,500, the landlord will be required to contribute the rest of the cost of works.

For off-gas privately rented properties, the landlord is also required to fund one third of the cost of upgrades, but the remaining cost can be provided by the grant, up to the maximum amounts shown in Table 1, dependent on EPC rating and heating fuel type. Table 3 provides the example landlord contributions. If total cost of works exceeds the values in Table 1, additional landlord contribution will be required for works to proceed.

Table 3: Off-gas (HUG1) private-rented landlord cost expectations, dependent on pre-EPC and heating fuel type.

	F&G		E		D	
	Landlord	HUG	Landlord	HUG	Landlord	HUG
<b>Electric</b>	£6,667	£13,333	£5,000	£10,000	£3,333	£6,666
<b>Off-gas grid fossil fuel (oil, LPG, coal)</b>	£8,333	£16,666	£6,667	£13,333	£5,000	£10,000

Landlords must provide a valid tenancy agreement, confirmation of property licensing, a declaration relating to the Special Drawing Rights, and willingness to contribute financially.

**Where a privately rented property is EPC F or G rated, landlords will need to prove compliance with existing minimum energy efficiency standards (MEES). Where this cannot be evidenced, funding will not be approved.**

Shared ownership properties where the scheme owner is liable for building upgrades will follow the same process as a private landlord.

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## Can I just have solar panels or an air source heat pump?

Eligible households can receive funding towards the cost of Solar Photovoltaics (PV), Solar Thermal (Hot Water) systems, and Air Source Heat Pumps, provided that the property has appropriate levels of insulation. If the required levels of insulation do not exist, funding will first be used to insulate the home. This is mandatory for all funding applications to meet the conditions of the grant. The viability of air source heat pumps will be considered following survey as to whether it is an appropriate replacement for the current heating system.

## How long is the funding available for?

The funding is available on a first-come first-serve basis, subject to availability and EPC rating. Installations **must be complete before the 31<sup>st</sup> March 2023**. Works carried out after this date will be ineligible for funding, unless an official extension is granted by BEIS.

## 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).

## 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 when requested to provide.
3. Proof of Address.

After installation:

4. Customer Completion Certificate

## How do I apply?

The application form is available on our website here: [www.actionsurrey.org/improve/SustainableWarmth](http://www.actionsurrey.org/improve/SustainableWarmth)

Submit this by email to [info@actionsurrey.org](mailto:info@actionsurrey.org) and Action Surrey will inform you of the documentation required to support your application.

If you are unsure about your eligibility and wish to speak with an advisor first, call the team on 0800 783 2503 or submit an enquiry [www.actionsurrey.org/enquiries](http://www.actionsurrey.org/enquiries), and a member of the team will contact you. ***Please note that the team cannot determine eligibility over the phone.***

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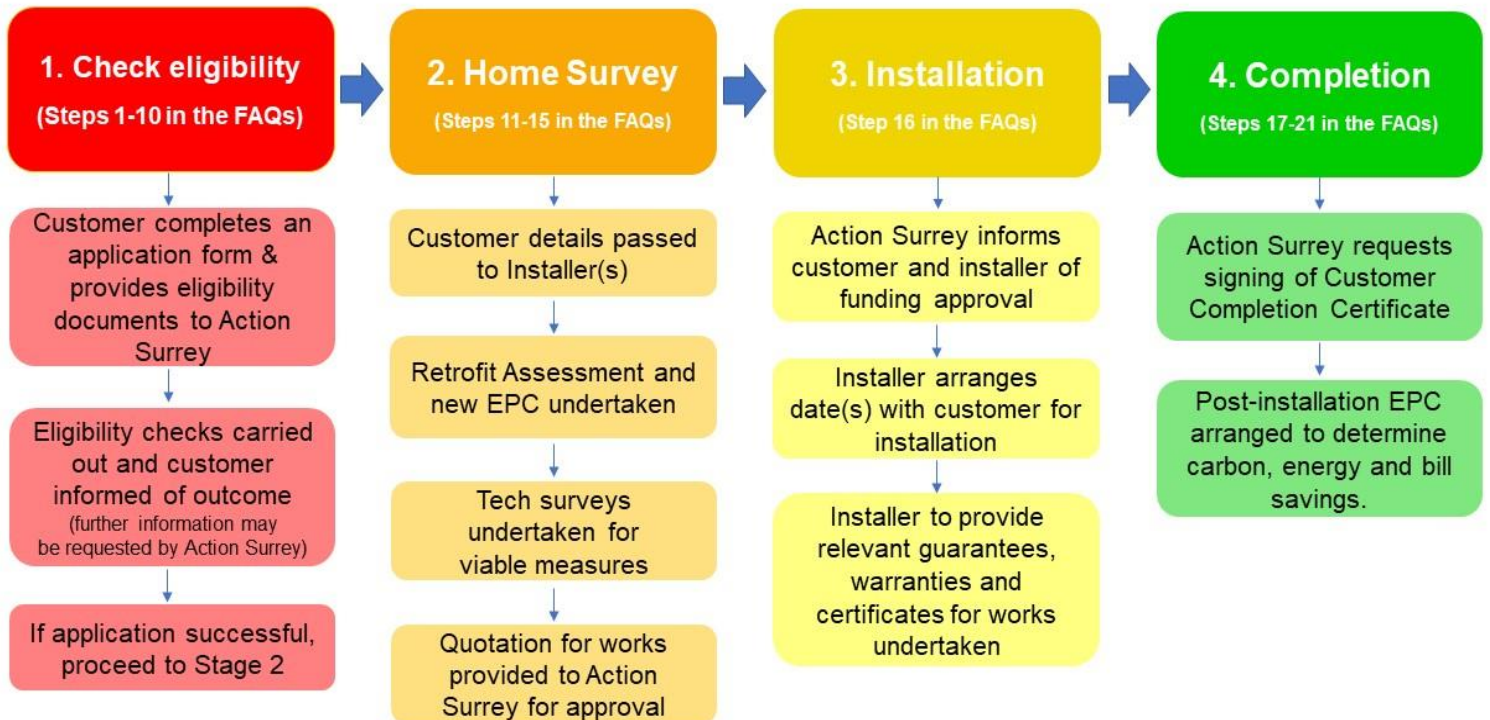
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## What is the Process?

### Sustainable Warmth Scheme – Customer Process



#### 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.

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**Stage 1: Confirmation of Eligibility:**

1. Fill out an application form. The team will review this and be in touch to confirm which documents we will require to support the application.
2. Action Surrey can explain the scheme and discuss the grant information if you wish to have further information. Contact Action Surrey 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.

**AND**

- B) household financial criteria: Applications must prove **one** of the following:
  - A household occupant is in receipt of **means-tested benefits** (Table 4).
  - A **gross** annual **household** income of less than £31,000 **before** tax/NI deductions.
  - A **gross** annual **household** income below £20,000 after housing costs deducted (annual mortgage 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.

**\* The government has imposed a limit on the proportion of EPC D-rated properties that can receive funding. As a result, E, F and G-rated properties will be prioritised and regrettably we cannot guarantee upgrades to all EPC D-rated properties, regardless of income eligibility of the household.**

Table 4: Means-tested benefits that auto-qualify a household's financial eligibility.

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

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**FAQ - How is the £31,000 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 and investments are all income that counts towards the threshold, and must be declared accurately.
- 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 that should be listed but whose income does not count include:
  - Full time university students.
  - Adult dependents residing in a property for care.
  - Those in prison.

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, include the recipient name, address and date.
  - b) To qualify under the income threshold of £31,000 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, P60 pension statement
    - Benefits certificates
    - SA302 & Tax Overview (for self-employed income)
    - Rental agreement showing lodger payments.

We may ask for 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 and council tax bills, matching the address of the application.

***All applications must be supported by a Council Tax Bill for 2022-23 as Proof of Address.***

***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.***

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- Existing Solar PV or Solar Thermal arrays cannot be repaired, replaced or extended. Existing loft insulation can be topped up if possible, but existing cavity wall or underfloor insulation cannot be extracted.
- The dwelling must be situated within Surrey County<sup>1</sup>
- Action Surrey will confirm the customer's permission to pass their details on to an installer and/or surveyor.
- As per government requirements, all customers will be provided with a Privacy Notice to explain the collection and usage of personal data. Customers will have the option to choose opt out of being contacted for research and evaluation purposes. A copy of the Privacy Policy can be found on the Action Surrey website.
- Action Surrey will also request a signature on the application form

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

Once an application form is received, the team will inform which documents are required to support the application and provide a link to login to the Action Surrey website to do so. Alternatively, the form is available on the online portal for previous customers – Call Action Surrey to activate it. Documents must be completed and submitted within 7 days of receiving login details.

#### **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.

- 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.

<sup>1</sup> Properties within Surrey County must be within the following boroughs: Elmbridge, Epsom & Ewell, Guildford, Mole Valley, Reigate & Banstead, Runnymede, Spelthorne, Surrey Heath, Tandridge, Waverley and Woking.

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## Stage 2: Home 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 a retrofit survey appointment. This 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. The installer(s) will carry out a Retrofit Assessment and a Retrofit Co-ordinator will produce a plan of works for the property. Depending on the works required, further referrals may be made to other installers on the network for technical surveys. **Please note: For park homes, only external wall insulation can be funded.**
14. Following surveys, quotations will be shared with Action Surrey to identify the amount of funding required. Other essential works will be detailed on the quote(s) and will be covered by the funding (where the funding limit is not exceeded).
15. Action Surrey will contact the customer to confirm the quotation can be funded, then notify the installer to arrange an installation date with the customer.

### 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.

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

- Prior to renewables being installed, viable insulation (e.g. loft, cavity wall, underfloor) must be installed first.
- Ventilation, such as mechanical extracts, trickle vents, positive input ventilation (PIV) systems and extraction vents may be required. These are a requirement of the installers' accreditation and are required for installations to comply with grant conditions.

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

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### Stage 3: Installation:

16. The installer(s) will carry out the works as detailed on the quote(s). Insulation will be installed prior to renewables (solar PV, solar thermal, air source heat pump).

#### FAQ – What access is required?

The installers will need to be able to access the loft to install loft insulation. The loft space will need to be sufficiently cleared **prior** to the installation. Where this is difficult for the homeowner, the installer may offer to assist at their discretion, however they will not be liable for any damage to items during this process.

Loft boarding may need to be lifted, raised and re-laid. If this is the case, the loft will need to be cleared in its entirety. Installing new boarding cannot be funded. Failure or refusal to clear a loft to enable loft insulation may result in subsequent measures being cancelled where these rely on fabric measures (e.g. renewables).

If installing Solar Thermal or an Air Source Heat Pump, space for a hot water tank is also required.

The roof must be in a safe and satisfactory condition for solar installations and the installer reserves the right to terminate installation at any point if the roof is deemed unsafe for installation.

#### FAQ - Will I need planning permission?

In most cases, no – However, if you are to receive external wall insulation, solar panels or an air source heat pump and live in a conservation area or other local planning zone, please check with the relevant local authority prior to accepting the grant.

If you live in a park home, you may require permission from the park home site owner before having external wall insulation.

It may not be possible to fund improvements to listed buildings.

### Stage 4: Completion and Payment for the work

17. Once works have been installed, the customer will be asked to complete a Customer Completion Certificate (example provided in appendix 1) within 5 days of the installation completing. Any reason for not returning the form must be identified to Action Surrey within this time frame. Upon receipt of the certificate or elapse of the 5 days with no 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.

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**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.

18. A post-installation EPC will be carried out (funded by the scheme) once all works on a property are completed. This is required by the government to assess the achieved savings from the scheme.
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. As part of the auditing and due diligence requirement for the project, a random selection of properties will be independently surveyed after/during installation of the works. Action Surrey is working with an independent surveying company to carry out these surveys and customers will be contacted if their property has been selected.
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.

**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.

Elmbridge Borough Council	01372 474474
Epsom & Ewell Borough Council	01372 732000
Guildford Borough Council	01483 505050
Mole Valley District Council	01306 885001
Reigate & Banstead Borough Council	01737 276000
Runnymede Borough Council	01932 838383
Spelthorne Borough Council	01784 451499
Surrey Heath Borough Council	01276 707100
Tandridge District Council	01883 722000
Waverley Borough Council	01483 523333
Woking Borough Council	01483 755855

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**Appendix 1 – Copy of Customer Completion Certificate**

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

I understand that payment for the works is to be made pursuant to the Green Homes Grant Sustainable Warmth scheme.

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

I understand that in the event of complaint about the works I need to contact the Installer and not 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 Green Homes Grant 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:.....

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