

## Customer FAQs

### What is the project?

This grant project is the second phase of the Green Homes Grant Local Authority Delivery scheme project being run by Action Surrey on behalf of 11 of the Boroughs & Districts across Surrey and the Cambridge & Peterborough Combined Authority (CPCA). Funding for the project is available through UK Government's Green Homes Grant scheme.

### What is Action Surrey?

Action Surrey is an impartial energy advice service set up by Surrey's local authorities and Surrey County Council to help residents save money on their energy bills. Action Surrey has a network of trusted installers to deliver home energy efficiency improvements.

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?

The funding provides eligible owner-occupied households with a maximum of £10,000 towards the cost of the works\*. There is no financial contribution expected from owner-occupiers. There is also no need for a customer to pay a deposit for any works.

Eligible owner-occupied households can receive funding to cover the cost of Solar Photovoltaics (PV) and/or Solar Thermal (Hot Water) systems, provided that the property has appropriate levels of loft, cavity wall or suspended floor insulation. Where these types of insulation are viable, funding will first be used to improve insulation. This is mandatory for all grant applicants to meet the conditions of the grant.

\*£10,000 is the limit for funding per property, however in the majority of cases it is not expected that this will be the total value of works. The 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.

### How long is the funding available for?

The funding is available on a first-come first-serve basis, and applications will be taken until 31<sup>st</sup> March 2022, subject to availability of funding. Installations must be complete before the 30<sup>th</sup> June 2022 and works carried out after this date may be ineligible for funding.

### 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).

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

Before installation:

1. Income declaration form and relevant supporting evidence
2. Customer Commitment form

After installation:

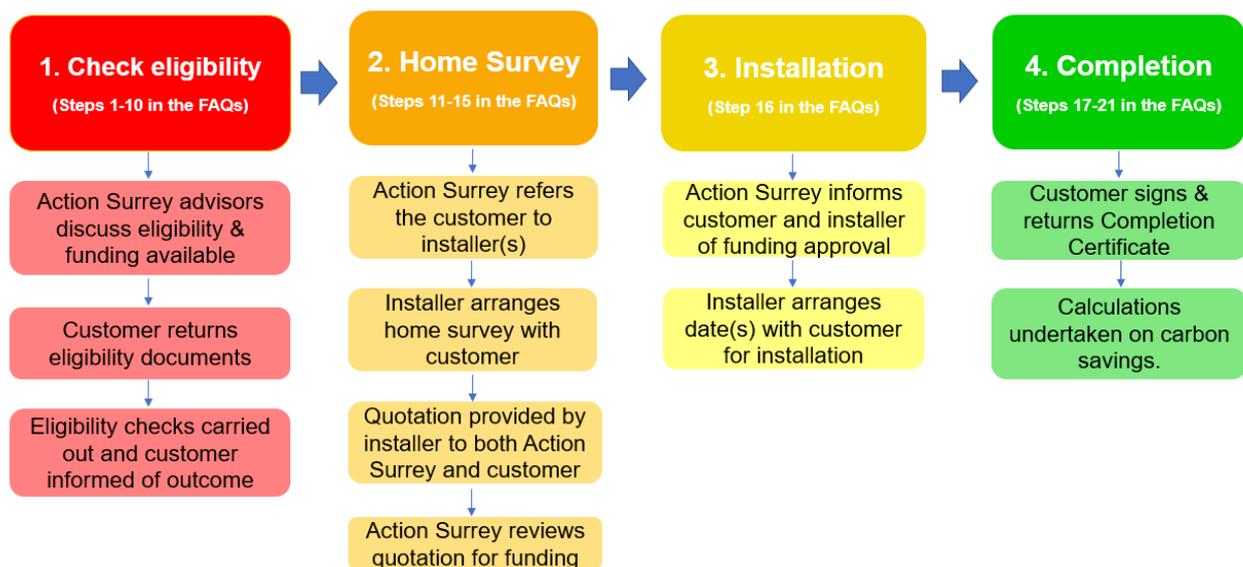
3. Customer Completion Certificate

All required documents can be completed and provided via the customer's portal on the Action Surrey website. Customers will receive login details for their online accounts after contacting Action Surrey and can access the portal here:

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

## How do I apply?

Applying is simple - Action Surrey will assist you. See below for each stage of the process.



### Step 1: Confirmation of Eligibility:

1. Contact Action Surrey at **0800 783 2503** or complete an online enquiry form on the Action Surrey website - [www.actionsurrey.org/enquiries](http://www.actionsurrey.org/enquiries)
2. Action Surrey will explain the scheme and discuss your eligibility for funding.
3. Eligibility for funding is dependent on two aspects:

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- A) the current energy efficiency rating of your home: An Energy Performance Certificate rating of D\*, E, F or G.

## **AND**

- B) financial criteria: Applications must prove **one** of the following:
- A household occupant is in receipt of Universal Credit
  - An annual **household** income of less than £30,000 **after** automatic deductions to employment income (Tax, National Insurance).
  - An annual **household** income of £30,000 - £35,000, where resultant household income after auto-deductions and deductions of housing costs (mortgage, energy bills) is below £20,000.

**Please note: Benefit payments, pensions, lodger rent payments, salaries, self-employment income, are all examples of income counting towards the income threshold and must be declared accurately.**

### **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. Action Surrey can arrange this, and it will be funded under the scheme.

### **FAQ - How is the £30,000 income calculated?**

- This is the total income for **all adults over 18 years of age** living in the property.
- Where lodgers are present, rent paid is counted towards household income and they must be listed on the application, but income they receive is not counted. A rental agreement must be provided.
- Other discounted adults 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.**

\* There is a cap on the proportion of D-rated properties that can receive funding.

4. Customers will be asked to complete an income declaration form and provide the relevant income evidence to qualify under one of the eligible criteria:

- To qualify with Universal Credit, receipt must be evidenced by a valid Universal Credit letter, dated within the last 12 months. Online versions from the gov.uk website can also be accepted provided the name and date is clear and matches the application.

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- To qualify under the income threshold of £30,000 after deductions, the following can be provided: 3 months of PAYE slips, state pension letter, P60 pension statement, benefits certificates, Self-Assessment 302 & Tax Overview (for self-employed income), bank statements (e.g. for rental payments from lodgers).
- To qualify under the income threshold of £20,000 after housing costs, the above documents used to determine net household income (of between £30,000-£35,000) must be provided, in addition to a mortgage statement and recent gas and electricity bills, matching the address of the application.

***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.***

5. 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.
6. The dwelling must be situated within Surrey County<sup>1</sup>
7. Action Surrey will confirm the customer's permission to pass their details on to an installer in order to carry out the works.
8. 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 whether or not they are happy to be contacted for research and evaluation purposes. A copy of the Privacy Policy can be found on the Action Surrey website.
9. Action Surrey will also share a copy of the Customer Commitment document for signature.

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

Customers will create an account for the Action Surrey portal. The income declaration, associated evidence and all relevant forms can be completed and submitted through the portal. Documents must be completed and submitted within 7 days of receiving login details.

<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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**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, an employee or director of ThamesWey Sustainable Communities, or a close family member of any of the afore mentioned groups, this must be declared to Action Surrey prior to the acceptance of a grant.

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

In most cases, no – the installation of solar panels on a residential building roof is a 'permitted development', as is insulation of loft and cavity walls, and therefore there is no need to apply to the Planning Authority for permission. However, this may not apply to properties in conservation areas or other local planning zones.

**Step 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 survey. 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 will visit the property to carry out a survey to determine which measures are feasible and to generate a quote.

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14. Following the survey, a copy of the quote will be shared with Action Surrey to identify the amount of funding required. Other essential works will be detailed on the quote and will be covered by the funding (where the £10,000 limit is not exceeded).

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

- Prior to solar PV 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 may be required. These are a requirement of the installers' accreditation and are non-negotiable for installations to comply with grant conditions.

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

15. Action Surrey will contact the customer to confirm they are happy to proceed, 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.

**Step 3: Installation:**

16. The installer will carry out the works as detailed on the quote.

**FAQ – What access is required?**

The installers may 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.

If installing Solar Thermal technology, access to a space for a hot water tank is also required.

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

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

17. Once the works have been installed, the customer will be asked to complete a Customer Completion Certificate (example provided in appendix 1) via the Action Surrey portal. Upon receipt of the certificate, 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 any works which fall outside the scope of the project, or where the works exceed £10,000 and a customer contribution has been agreed prior to installation.

#### 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.

If a concern or complaint cannot be resolved between the customer and the installer, Action Surrey 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. Calculations will be undertaken to determine the carbon savings achieved by the installation(s). This could be in the form of a post-installation assessment by a Retrofit Co-ordinator, or through conducting a new Energy Performance Certificate (EPC). The method chosen will be at the discretion of Action Surrey.
19. The customer will receive a copy of the MCS Certificate following a solar installation, along with associated guarantees. Guarantees will also be provided by the installer for loft, cavity wall and underfloor insulation.
20. As part of the auditing and due diligence requirement for the project, a random selection of properties will be independently surveyed after 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.

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## Additional advice

Action Surrey will be available to answer any customer questions or concerns throughout the entire 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 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 10 working 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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