

## ECO4 & Great British Insulation Scheme Pre-Installation Project/ Measure Survey

### Introduction

The purpose of this form is to collect project/retrofit-level information before the installation of measure(s) takes place. The form may be completed offsite when installation is complete and can be used for both ECO4 and Great British Insulation Schemes.

The information and details recorded here must be true and accurate. If issues arise that raise doubts around the accuracy of the evidence and information provided, measures will be investigated and may be rejected. Any fraudulent activity, including misrepresenting details of the property, may also be reported to law enforcement agencies.

Any evidence of electronically duplicated or forged signatures will be investigated. Any measures where suspected fraudulent activity is detected will be rejected.

Ofgem also recommends that any additional evidence collected as part of these forms be handled as the final step in the process to adhere to Data Protection Act 2018 requirements<sup>1</sup>.

All photographic evidence in relation to a measure must be appropriate and in line with UK GDPR<sup>2</sup> and Data Protection Act 2018 requirements<sup>3</sup>.

For a better understanding of how the data in this form will be used under the Great British Insulation Scheme or ECO4, please visit our website<sup>4</sup>.

Please be aware that some sections are scheme specific – and have been labelled as so. If a section or question is not relevant to your scheme, please leave section blank.

Additional pages should be appended if there is not enough space in the fields provided.

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<sup>1</sup> [Data Protection Act 2018 \(legislation.gov.uk\)](https://www.legislation.gov.uk)

<sup>2</sup> Please note you may be required to provide photographic evidence alongside this document. Photographic evidence in relation to a measure must be appropriate and in line with UK GDPR and Data Protection Act 2018 requirements.

<sup>3</sup> [Guide to the UK General Data Protection Regulation \(UK GDPR\) | ICO](https://www.gov.uk/guidance/guide-to-the-uk-general-data-protection-regulation-uk-gdpr)

<sup>4</sup> <https://www.ofgem.gov.uk/environmental-and-social-schemes/great-british-insulation-scheme>  
<https://www.ofgem.gov.uk/publications/eco-privacy-notice>

**Completing the pre-installation project/retrofit survey form.**

Form Information	
Section A	Collects details of the premises where the project is being carried out, such as address, floor area segment and starting SAP band, and the measures that will be included in the project.
Section B	Collects information on wall insulation measures. Only required for projects which include wall insulation.
Section C	Collects information on heating controls and electric storage heaters. This section must be completed for any project which includes the installation of a heating measure.
Section D	Collects information on sketch plan of the premises. Its mandatory for all projects and can be completed by retrofit designer/assessor or retrofit coordinator.
Section E	Declaration for completion by the Retrofit Coordinator or if a project consists solely of a connection to a district heating system (DHC) or a DHC and data light measures (DLMs) only, the DHC installer

## A. Customer, Retrofit Coordinator and Premises Details

For PAS and GB insulation scheme measures, fields 1-2 and 6-10 are optional. Field 3 is optional for social housing.

For Non-PAS measures, all fields are required.

Field	Response					
1. Date of pre project RdSAP / SAP survey:						
2. Retrofit Coordinator:	Name:  Company name:  Tel:  Email:					
3. Name of occupier:						
4. Address of installation and postcode:						
5. Property type <sup>5</sup> :	<input type="checkbox"/> House <input type="checkbox"/> Flat/Maisonette <input type="checkbox"/> Park home					
6. Tenure type:	<input type="checkbox"/> Owner occupier <input type="checkbox"/> Private tenant <input type="checkbox"/> Social housing					
7. Floor area segment <sup>6</sup> (m <sup>2</sup> )	<table border="0"> <tr> <td><input type="checkbox"/> 0-72 m<sup>2</sup></td> <td><input type="checkbox"/> 73-97m<sup>2</sup></td> <td rowspan="2">Total floor area (m<sup>2</sup>):</td> </tr> <tr> <td><input type="checkbox"/> 98-199 m<sup>2</sup></td> <td><input type="checkbox"/> 200+m<sup>2</sup></td> </tr> </table>	<input type="checkbox"/> 0-72 m <sup>2</sup>	<input type="checkbox"/> 73-97m <sup>2</sup>	Total floor area (m <sup>2</sup> ):	<input type="checkbox"/> 98-199 m <sup>2</sup>	<input type="checkbox"/> 200+m <sup>2</sup>
<input type="checkbox"/> 0-72 m <sup>2</sup>	<input type="checkbox"/> 73-97m <sup>2</sup>	Total floor area (m <sup>2</sup> ):				
<input type="checkbox"/> 98-199 m <sup>2</sup>	<input type="checkbox"/> 200+m <sup>2</sup>					

<sup>5</sup> This information is required when measures in the project may be used to support In-fill measures in nearby homes. For the purposes of ECO4 In-fill, 'house' includes bungalows, and 'flat' includes maisonettes.

<sup>6</sup> Floor area segment must be based on the internal total floor area output by the RdSAP/SAP assessment. Whilst RdSAP permits external dimension to be input, these will be converted to internal dimensions by the software.

Field	Response	
8. Starting SAP Band <sup>7</sup>	<input type="checkbox"/> High B <input type="checkbox"/> High C <input type="checkbox"/> High D <input type="checkbox"/> High E <input type="checkbox"/> High F <input type="checkbox"/> High G <input type="checkbox"/> Low B <input type="checkbox"/> Low C <input type="checkbox"/> Low D <input type="checkbox"/> Low E <input type="checkbox"/> Low F <input type="checkbox"/> Low G	
9. Starting SAP rating:		
10. Pre assessment Methodology:	<input type="checkbox"/> RdSAP  <input type="checkbox"/> SAP	Where relevant, pre retrofit EPC reference number: <sup>8</sup>
11. Is the property in a rural area? <sup>9</sup>	<input type="checkbox"/> Yes (Enter area code) <input type="checkbox"/> N/A	Output Area Code:
12. Has the sketch plan/floor plan of the premises been provided alongside pictorial evidence?	<input type="checkbox"/> Yes (See section D)	
13. Has smart meter advice been issued?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

<sup>7</sup> [Standard Assessment Procedure - GOV.UK \(www.gov.uk\)](http://www.gov.uk)

<sup>8</sup> An EPC is required for projects that only include DHC and DLM measures and for in-fill DHC measures, except where the DHC measure is the installation of a shared ground loop GSHP. For projects within the score of PAS the assessment will be lodged with Trustmark and no reference number is needed. Mix of a pre-EPC and post EPR would not be accepted. The pre-retrofit and post-retrofit assessment must use the same methodology. Where the pre-retrofit is a full SAP lodged as an EPC, the post-retrofit must be the same. This is stated in the [supplier data dictionary](#), in the description for the field 'Post\_Assessment\_Methodology'.

<sup>9</sup> [Rural/urban classifications - Office for National Statistics](#) - Applies to England, Wales and Scotland. Premises in rural area in England aren't eligible for the rural off gas uplift.

What measure/s will be carried out following the pre installation RdSAP /SAP project survey? (Please tick below the relevant boxes)			
Insulation Measures		Heating Measures	
<b>Wall Measures:</b>	<input type="checkbox"/> Cavity wall Insulation <input type="checkbox"/> External Wall Insulation <input type="checkbox"/> Internal Wall Insulation <input type="checkbox"/> Hybrid Wall Insulation	<b>Boiler Measures:</b>  (ECO4 only)	<input type="checkbox"/> Repair <input type="checkbox"/> Broken Replacement <input type="checkbox"/> Upgrade <input type="checkbox"/> First time central heating
<b>Floor Measures:</b>	<input type="checkbox"/> Underfloor insulation <input type="checkbox"/> Solid floor insulation	<b>Electric storage heaters Measures:</b> (ECO4 only)	<input type="checkbox"/> Repair <input type="checkbox"/> Broken Replacement <input type="checkbox"/> Upgrade
<b>Roof Measures:</b>	<input type="checkbox"/> Loft insulation <input type="checkbox"/> Pitched roof insulation <input type="checkbox"/> Flat roof insulation <input type="checkbox"/> Room in Roof insulation	<b>Heating controls measures:</b>	<input type="checkbox"/> Programmer & room thermostat <input type="checkbox"/> Smart thermostat <input type="checkbox"/> TRVs <input type="checkbox"/> Time & Temperature Zone control <input type="checkbox"/> Weather/load Compensation
<b>Park Home insulation:</b>	<input type="checkbox"/> Floor <input type="checkbox"/> Wall <input type="checkbox"/> Roof	<b>Other measures:</b>	<input type="checkbox"/> Solar PV <input type="checkbox"/> District Heating Connection or repair <input type="checkbox"/> Standard Alternative Methodology (AM) <input type="checkbox"/> Data Light Measure
<b>Other insulation measures:</b>	<input type="checkbox"/> Draught proofing <input type="checkbox"/> Window glazing <input type="checkbox"/> Single to double <input type="checkbox"/> Improved double <input type="checkbox"/> Higher performance external doors		

## B. Information on Wall Insulation Measures

This section is required for measures or projects which include wall insulation.

All wall insulation measures	
1. Approximate construction year or age band, plus reasoning	
2. Predominate wall construction type eg solid brick, timber frame or system build <sup>10</sup>	
3. Percentage of total wall area this wall type:	%
Cavity wall insulation measures	
4. Are you claiming on ECO for extracted failed cavity wall?	<input type="checkbox"/> Yes <sup>11</sup> <input type="checkbox"/> No <input type="checkbox"/> N/A
5. Are the walls already partially insulated? <sup>12</sup>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

<sup>10</sup> Although most system build properties meet the definition of solid wall, some have external walls of a standard cavity construction and require a cavity wall insulation measure. The construction type of the external walls of a system build property should therefore be assessed prior to insulating the property

<sup>11</sup> A report from a chartered surveyor will be required to validate the failed cavity wall material and evidence provided that no existing guarantee is in place

<sup>12</sup> If the U value of the wall already meets relevant standards, any additional insulation will not be an eligible CWI measure.

## C. Information for Heating Measures

This section is required for projects or retrofits which include the installation of a heating measure. Question 3 is for ECO4 only.

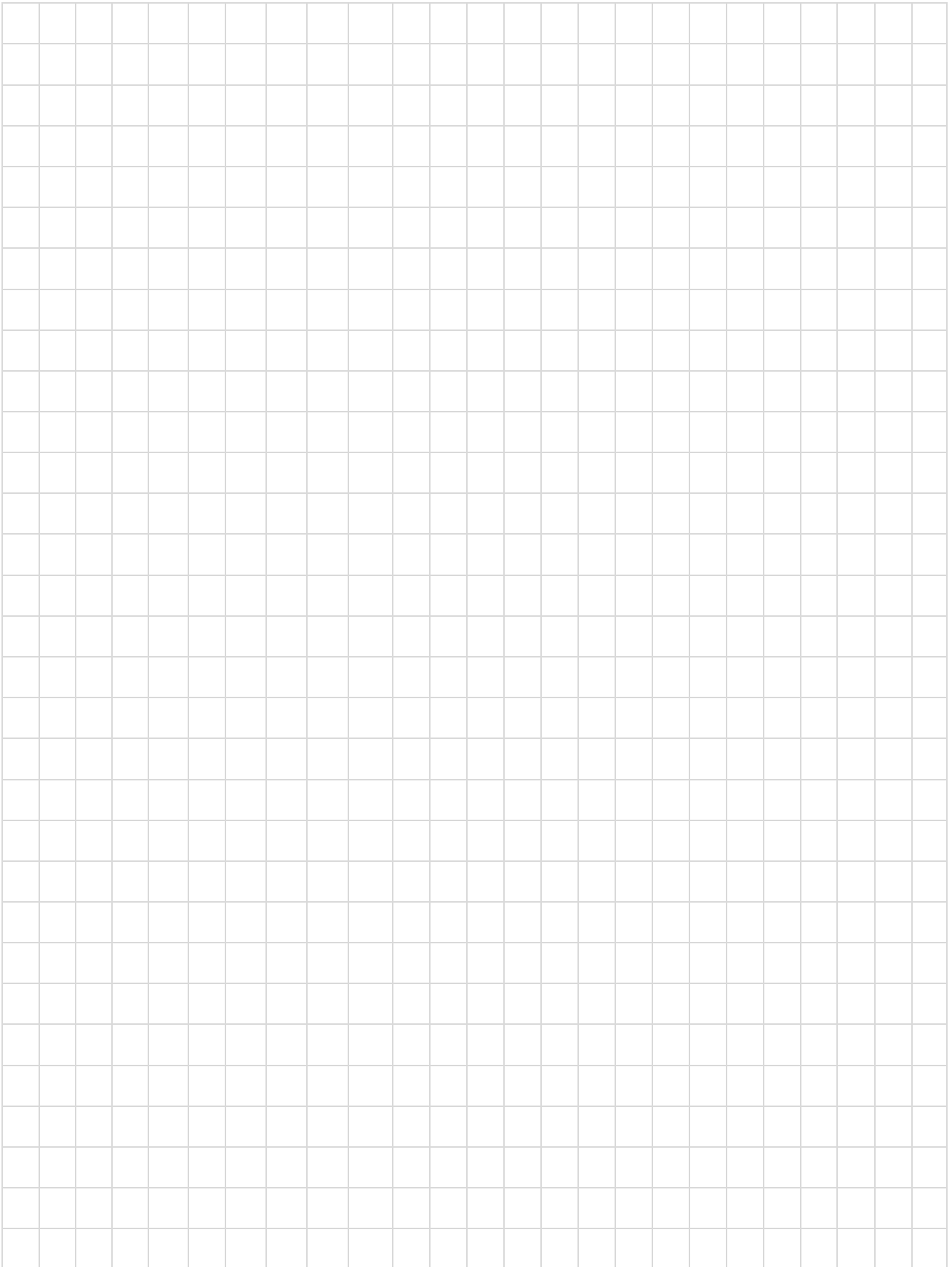
1. Is there a full set of functioning pre-existing heating controls?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
2. What working heating controls currently exist?		<input type="checkbox"/> Room Thermostat <input type="checkbox"/> Boiler Programmer <input type="checkbox"/> Smart Thermostat <input type="checkbox"/> TRV (if TRV please go to 2a)	
2a) TRV	➤ The existing number of radiators: _____ ➤ The existing number of radiators with TRVs: _____ ➤ The existing number of heated towel rails: _____ ➤ The existing number of heated towel rails with TRVs: _____ Does the system incorporate a bypass radiator? <input type="checkbox"/> Yes <input type="checkbox"/> No		
3. Pre-existing ESH (ECO4 only)	<input type="checkbox"/> Yes  <input type="checkbox"/> No	Type:  1 _____ 2 _____ 3 _____ 4 _____ 5 _____	Responsiveness:  1 _____ 2 _____ 3 _____ 4 _____ 5 _____

## D. Sketch Plan and Instructions for all measure types

Basic sketch plan instructions for all measure types	
<p><b>Room Key<sup>13</sup>:</b> BR# = Bedrooms; LR = Living Room; K = Kitchen; D = Dining Room; BTH = Bathroom.</p> <p><b>Wall Type key:</b> Cavity/non cavity; Adjacent to unheated space/corridor.</p> <p>Doors should only be included where the measure being scored is a high-performance external door, and windows should only be included where the measure is window glazing.</p>	
Sketch plan instruction by measure type	
Heating Measures	Roof, wall and floor measures
<p>HS# = heating system/boiler (HS1 = main heating source)</p> <p>RAD = Radiator with no existing TRV</p> <p>RADT = Radiator with existing TRV</p> <p>RS = Room stat</p> <p>ST = Smart thermostat</p> <p>TW = Tower rail</p> <p>TWTRV = Towel rails with TRVs</p> <p>RH = Room heater</p> <p>ESH = Storage heater</p> <p>UFH = Under floor heating</p>	<p>The location of pre-main heat source(s) should be clearly recorded on the sketch using the key in the 'heating measures' column.</p> <p>PR = Pitched roof</p> <p>FR = Flat roof</p> <p>RIR = Room in roof</p> <p>RES = RIRI Residual Loft Area</p> <p>UFI = Under floor insulation (specify solid or suspended)</p>

<sup>13</sup> For multi storey premises, please record floor position, ie basement, ground floor, room-in-roof adjacent to the relevant sketch.





## E. Retrofit Coordinator or DHC Installer Declaration

Question 1 is optional for PAS and GB insulation scheme retrofits only.

Details and declaration		
1. Retrofit Coordinator or DHC Installer <sup>14</sup> : name, company, and address:		Trustmark License Number (TMLN): <sup>15</sup>
2. I confirm that all the information on this form has been accurately presented:	<input type="checkbox"/> Yes <input type="checkbox"/> No (If no, enter what has not been declared and what's the reason for not declaring it)	
3. I confirm that the building was pre-existing before 1 April 2022		<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Retrofit Coordinator or DHC Installer Signature and date:		Date:

<sup>14</sup> A DHC installer may sign this declaration only in the case of projects consisting solely of a connection to a district heating system (DHC) or a DHC and data light measures (DLMs) only.

<sup>15</sup>Not mandatory for DHC/ DLM measures.