

Energy Company Obligation (ECO4) Pre-Installation Project Survey

Introduction

The purpose of this form is to collect project-level information before the installation of measures takes place.

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.

All photographic evidence in relation to a measure must be appropriate and in line with UK GDPR¹ and Data Protection Act 2018 requirements²

Completing the pre-installation project survey form

Guidance	
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. It is mandatory for all projects.
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	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. It is mandatory for all projects.

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

¹ 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.

² [Guide to the UK General Data Protection Regulation \(UK GDPR\) | ICO](#)

A. Customer, Operative and Premises Details

Question	Response		
1. Date of survey:			
2. Assessor / Operative:	Name: Company name: Tel: Email:		
3. Name of customer:			
4. Address of installation:			
5. Post code:			
6. Property type: ³	House	Flat	Park Home
7. Tenure	Owner occupier	Private tenant	Social housing tenant
8. Floor area segment ⁴ (m ²)	<input type="checkbox"/> 0-72 m ² <input type="checkbox"/> 98-199 m ²	<input type="checkbox"/> 73-97 m ² <input type="checkbox"/> 200+m ²	Total floor area (m ²):
9. Starting SAP Band ⁵	<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		
10. Starting SAP rating	SAP Rating: _____		
11. Pre assessment Methodology:	<input type="checkbox"/> RdSAP <input type="checkbox"/> SAP	Where relevant, pre retrofit EPC reference number: ⁶	
12. Is the property in a rural area? ⁷	<input type="checkbox"/> Yes (Enter area code) <input type="checkbox"/> N/A	Output Area Code:	
13. Has the sketch plan/floor plan of the premises been provided alongside pictorial evidence?			<input type="checkbox"/> Yes

³ 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.

⁴ 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.

⁵ [Standard Assessment Procedure - GOV.UK \(www.gov.uk\)](http://www.gov.uk)

⁶ 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.

⁷ [*Rural/urban classifications - Office for National Statistics](http://www.gov.uk)

**Applies to England, Wales and Scotland. Premises in rural area in England aren't eligible for the rural off gas uplift.

Question	Response		
14. What measure/s will be carried out following the pre installation project survey? (Please tick below the relevant boxes)			
Insulation Measures		Heating Measures	
Wall Measures:	<input type="checkbox"/> Cavity wall Insulation <input type="checkbox"/> External Wall Insulation <input type="checkbox"/> Internal Wall Insulation <input type="checkbox"/> Hybrid Wall Insulation	Boiler Measures:	<input type="checkbox"/> Repair <input type="checkbox"/> Broken Replacement <input type="checkbox"/> Upgrade <input type="checkbox"/> First time central heating
Floor Measures:	<input type="checkbox"/> Underfloor insulation <input type="checkbox"/> Solid floor insulation	Electric storage heaters Measures:	<input type="checkbox"/> Repair <input type="checkbox"/> Broken Replacement <input type="checkbox"/> Upgrade
Roof Measures:	<input type="checkbox"/> Loft insulation <input type="checkbox"/> Pitched roof insulation <input type="checkbox"/> Flat roof insulation <input type="checkbox"/> Room in Roof insulation	Heating controls measures:	<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
Park Home insulation:	<input type="checkbox"/> Floor <input type="checkbox"/> Wall <input type="checkbox"/> Roof	Other measures:	<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
Other insulation measures:	<input type="checkbox"/> Draught proofing <input type="checkbox"/> Single to double <input type="checkbox"/> Improved double <input type="checkbox"/> Window glazing <input type="checkbox"/> Higher performance external doors		

B. Information on Wall Insulation Measures

All wall insulation measures	
1. Approximate construction year or age band, & reasoning:	
2. Please state predominate wall construction type? E.g solid brick, timber frame or system build ⁸ :	
3. What percentage of total wall area does this wall type comprise?	%
Cavity wall insulation measures	
4. Are you claiming on ECO for extracted failed cavity wall? ⁹	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
5. Are the walls already partially insulated? ¹⁰	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

⁸ 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

⁹ 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

¹⁰ 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

15. Are there a full set of functioning pre-existing heating controls?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
16. What working heating controls currently exist?		<input type="checkbox"/> Room Thermostat <input type="checkbox"/> Programmer <input type="checkbox"/> Smart Thermostat	
<input type="checkbox"/> TRV	➤ Please record the existing number of radiators _____ ➤ Please record the existing number of TRV's _____ ➤ Please record the existing number of Towel Rails _____ ➤ Does the system incorporate a bypass radiator? Y/N _____		
17. Pre-existing ESH? ¹¹ Y / N?	18.	Type:	Responsiveness:

D. Retrofit Coordinator or DHC Installer Declaration

Details and declaration		
Retrofit Coordinator or DHC Installer ¹² : name, - company and address:		Trustmark Business license number: ¹³
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)	
I confirm that the building was pre-existing before 1 April 2022		<input type="checkbox"/> Yes <input type="checkbox"/> No
Retrofit Coordinator or DHC Installer Signature and date:		___ / ___ / _____

¹² 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.

¹³Not mandatory for DHC/ DLM measures. Enter details for PAS measures only.