

The Great British Insulation Scheme: Eligibility and Pre-Retrofit Declaration v1

Introduction

This document is intended to be used to confirm the eligibility of householders and properties receiving measure(s) under the Great British Insulation Scheme. It also collects premises level information before the installation of measure/s takes place. The form may be completed onsite or offsite before the start of the measure(s).

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 or scheme abuse is detected will be rejected¹.

All photographic evidence in relation to a measure must be appropriate and in line with UK GDPR² and Data Protection Act 2018 requirements³

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 requirements⁴

For better understanding on how your data will be used under the Great British Insulation Scheme please visit our website⁵.

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

¹ Please see chapter 8 in the ECO4 Delivery Guidance for further information.

² 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.

³ <https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/>

⁴ <https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/>

⁵ <https://www.ofgem.gov.uk/ofgem-privacy-policy>

<https://www.ofgem.gov.uk/environmental-and-social-schemes/great-british-insulation-scheme>

Completing the pre retrofit declaration form

	Guidance
Section A	This section collects information regarding the premises as well as customer eligibility data including address data, tenure type and verification method. The customer confirms all information in section A is true by signing the customer declaration. The accompanying templates that may be used to evidence private domestic premises and social housing may be found on the Great British Insulation Scheme website. Questions 1-11 are mandatory fields for all eligibility types.
Section B	<p>This section collects information about the premises before the installation of a measure takes place.</p> <ul style="list-style-type: none"> ➤ Questions 1 to 7 are mandatory for all retrofits. ➤ Questions 8 is required to be filled only when a relevant measure is carried out following the pre-installation RdSAP assessment. ➤ Question 9 is required to be completed only when secondary heating controls are carried out following the pre-installation RdSAP assessment.
Section C	<p>This section contains the following declarations:</p> <ol style="list-style-type: none"> a. Landlord Permission and Blended Funding Declaration b. Social Housing Declaration c. Child Benefit Self-Declaration d. Data Use Declaration <p>The Social Housing Declaration allows the social landlord to confirm the following:</p> <ul style="list-style-type: none"> ➤ the Pre-install RdSAP Assessment reflects the current characteristics of the premises. ➤ the premises are generally being let at below market rate. <p>In addition, the social landlord officer should ensure any necessary permission for a Great British Insulation Scheme measure has been obtained. The signatory must review the available evidence and records relating to the premises prior to signing this declaration. It must be completed by the owner, landlord and social landlord officer respectively.</p> <p>Child Benefit:</p> <p>Under the Home Heating Cost Reduction Obligation (HHCRO), suppliers can deliver measures to consumers in receipt of Child Benefit where the occupier of the premises is under the specified income threshold for their household composition. The Child Benefit Self-Declaration must be used to evidence Help to Heat Group (HTHG) eligibility for Child Benefit recipients and contains a declaration that the</p>

	<p>household income⁶ does not exceed the relevant income threshold for the corresponding number of children. The declaration should be signed by the occupier.</p> <p>The relevant third party should also sign their section of the declaration to provide assurance that the person living at the premises is in receipt of Child Benefit and is not in receipt of any of the other HTHG qualifying benefits.</p>
Section D	Collects information on a sketch plan of the premises. It is mandatory for all measures and can be completed by retrofit designer/assessor. Pictorial evidence must be provided alongside at all cases.
Section E	This section is designed to be signed by the Retrofit Assessor to confirm that information in section D, E and F is true and accurate. This section can be completed either by the retrofit coordinator or retrofit assessor.

⁶ Income means annual gross income from all sources, including housing-related benefits, before tax. This should be determined based on the preceding annual tax year which runs from 6th April to 5th April of the following year.

A. Customer Eligibility Declaration

Question	Response
1. Name of customer	
2. Address of installation including postcode	
3. Unique Property Reference Number	
4. Tenure type	<input type="checkbox"/> Owner-occupier <input type="checkbox"/> Private tenant <input type="checkbox"/> Social housing tenant
a. Contact phone number and email address:	Contact number: _____ Email address ⁵ : _____
5. Council Tax Band	<input type="checkbox"/> Band A <input type="checkbox"/> Band B <input type="checkbox"/> Band C <input type="checkbox"/> Band D <input type="checkbox"/> Band E <input type="checkbox"/> Band F <input type="checkbox"/> Band G <input type="checkbox"/> Band H
6. Has the measure received funding from a government scheme?	<input type="checkbox"/> Yes (Go to 6a and tick relevant box) <input type="checkbox"/> No (Go to 7)

6a.	<input type="checkbox"/> ECO4 ⁷ <input type="checkbox"/> HUG ⁸ <input type="checkbox"/> GHG ⁹ <input type="checkbox"/> LAD ¹⁰ <input type="checkbox"/> BUS ¹¹ <input type="checkbox"/> WHD ¹² <input type="checkbox"/> SHDF ¹³
7. Eligibility route ¹⁴	<input type="checkbox"/> Help to Heat Group (HTHG) <input type="checkbox"/> Social Housing <input type="checkbox"/> General Group <input type="checkbox"/> Supplier Flex <input type="checkbox"/> LA ¹⁵ Flex <input type="checkbox"/> In Fill
8. Verification Method (if applicable) ¹⁶	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> WHD Core Group ¹⁷ <input type="checkbox"/> Child Benefit <input type="checkbox"/> LA Declaration¹⁸ <input type="checkbox"/> Other (agreed with Ofgem)¹⁹: _____ </div> <div style="width: 45%;"> <input type="checkbox"/> ECO Eligible Referral²⁰ <input type="checkbox"/> DWP Match²¹ <input type="checkbox"/> Supplier Declaration²² <input type="checkbox"/> HTHG Benefit Letter²³ </div> </div>
9. URN ²⁴ (corresponding to the verification method selected in question 8)	

⁷ Energy Company Obligation 4

⁸ Home Upgrade Scheme

⁹ Green Homes Grant

¹⁰ Local Authority Delivery Scheme

¹¹ Boiler Upgrade Scheme

¹² Warm Home Discount

¹³ Social Housing Decarbonisation Fund

¹⁴ Evidence must be provided of which more information can be found in the Great British Insulation Scheme Delivery Guidance, Section 3: Eligibility

¹⁵ Local Authority

¹⁶ See Chapter 3 of The Great British Insulation Scheme Delivery Guidance

¹⁷ **'WHD Core Group'** applies to England and Wales (but not Scotland) and may be selected where the supplier can produce a WHD Core Group notice at audit for the help to heat group member. A data link exists with the Department of Work and Pensions (DWP) so that help to heat group eligibility can be verified through a data matching exercise

¹⁸ 'Suppliers should select **'LA Declaration'** for measures where help to heat group eligibility has been verified using this method

¹⁹ **'Other'** should only be selected in exceptional circumstances when agreed with obligated supplier and Ofgem in advance of commencing the project

²⁰ Only suppliers that have signed up to the **ECO Eligible Referrals** (EER) route with DWP should select this option, this is available under The Great British Insulation Scheme.

²¹ **'DWP Match'** should be selected for measures where help to heat group eligibility has been verified using this method

²² **'Supplier declaration'** should be selected where 'eligibility type' also has 'supplier declaration'.

²³ **'HTHG Benefit Letter'** should be selected where DWP match is not available.

²⁴ Unique Reference Number

10. Occupancy evidence (Please redact any sensitive information when supplying the following evidence) ²⁵	<input type="checkbox"/> Utility Bill <input type="checkbox"/> Mortgage Statement <input type="checkbox"/> Other (enter details)_____	
11. Customer signature and date	Signature:	Date:

12. Details about Private / Social Landlord	
Type of landlord: Private landlord / Managing agent <input type="checkbox"/> Social landlord <input type="checkbox"/>	
Name of Private landlord / Managing agent / Social landlord ²⁶ :	
Social landlord officer name (if applicable):	
Social landlord officer job title ²⁷ (if applicable):	
Email:	
Contact phone number:	
Full address including postcode:	
13. Has the PRS Exemption Register Evidence (If applicable) been provided? ²⁸	<input type="checkbox"/> Yes <input type="checkbox"/> No

²⁵ See Chapter 3 of The Great British Insulation Scheme Delivery Guidance

²⁶ "Social landlord" is defined in Schedule 1 of the ECO4A Order 2023 may refer to a local council, housing association, housing authority or charity.

²⁷ "Social landlord officer" refers to the person completing this form on behalf of the social landlord.

²⁸ Evidence will be in the form of a screenshot of the PRS exemption register for pre-installation SAP band is band F or G

B. Pre-Retrofit Assessment Details

Question	Response
1. Date of pre-installation RdSAP assessment:	
2. Assessor / Operative:	Name: Company name: Telephone number: Email:
3. Property type ²⁹	<input type="checkbox"/> House <input type="checkbox"/> Flat <input type="checkbox"/> Park Home
4. Starting SAP band ³⁰ and starting SAP rating	<div style="display: flex; justify-content: space-between;"> <div> SAP Band: <input type="checkbox"/> High D <input type="checkbox"/> High E <input type="checkbox"/> High F <input type="checkbox"/> High G <input type="checkbox"/> Low D <input type="checkbox"/> Low E <input type="checkbox"/> Low F <input type="checkbox"/> Low G </div> <div>SAP Rating:</div> </div>
5. Floor area segment ³¹ (m ²)	<div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> 0-72 m² <input type="checkbox"/> 73-97 m² <input type="checkbox"/> 98-199 m² <input type="checkbox"/> 200+m² </div> <div>Total floor area (m²):</div> </div>
6. Is the property in a rural and off-gas area? ³²	<div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> Yes <input type="checkbox"/> No </div> <div>Output Area Code:</div> </div>

²⁹This information is required when measures may be used to support In-fill measures in nearby homes. For the purposes of GBIS In-fill, 'house' includes bungalows, and 'flat' includes maisonettes.

³⁰ [Standard Assessment Procedure - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/61441/Standard_Assessment_Procedure_-_GOV.UK_(www.gov.uk).pdf)

³¹ Floor area segment must be based on the internal total floor area output by the RdSAP assessment. Whilst RdSAP permits external dimension to be input, these will be converted to internal dimensions by the software.

³² Measures delivered to low-income households in rural off-gas properties in Wales and Scotland will receive an uplift of 20% [Rural/urban classifications - Office for National Statistics](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/61441/Rural_urban_classifications_-_Office_for_National_Statistics.pdf)

7. All wall insulation measures	
a. Approximate property construction year or age band, and reasoning:	
b. Predominant wall construction type e.g., solid brick, timber frame, or system build: ³³	
c. Percentage of total wall area this wall type comprises:	%
8. Cavity wall insulation measures only	
a. Are the walls already partially insulated? ³⁴	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Existing Heating Control	
a. Is there a full set of pre-existing heating controls?	<input type="checkbox"/> Yes <input type="checkbox"/> No
b. What working heating controls currently exist?	<input type="checkbox"/> Boiler programmer <input type="checkbox"/> Room thermostat <input type="checkbox"/> TRV (Go to 9c)
c. If TRVs are already installed at the property. Please record: <ul style="list-style-type: none"> ➤ The existing number of radiators: _____ ➤ The existing number of radiators with TRVs: _____ ➤ The existing number of towel rails: _____ ➤ The existing number of towel rails with TRVs: _____ ➤ Does the system incorporate a bypass radiator? <input type="checkbox"/> Yes <input type="checkbox"/> No 	
10. Has smart meter advice been issued?	<input type="checkbox"/> Yes <input type="checkbox"/> No

³³ 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

³⁴ If the U value of the wall already meets relevant standards, any additional insulation will not be an eligible CWI measure

C. Declarations and sign off

a. Landlord Permission and Blended Funding Declaration (to be completed by the landlord)

Funding for measures delivered under The Great British Insulation Scheme cannot be blended with funding from other government schemes or grants. Any measures outside of the scheme delivered to the same property would have to be installed either before or after the scheme measures are installed³⁵.

Declaration

I can confirm I am the ☐ landlord / ☐ management company of the property above and hereby give my consent for the works as indicated below to be completed.

I understand I may be contacted by any organisation carrying out the installation works or providing the funding, Ofgem or an energy supplier to verify this declaration as confirmation of permission.

By signing this declaration, I acknowledge that funding is being claimed through the Great British Insulation scheme and I have not and will not seek any funding for such measures through other government schemes or grants.

³⁵ See part 5 of the Electricity and Gas (Energy Company Obligation) Order 2023.

b. Social Housing Declaration (to be completed by the social landlord officer)

1. Social landlord is defined in paragraph 4 of Schedule 1 of the Electricity and Gas (Energy Company Obligation) Order 2022.

2. A “pre-installation RdSAP Assessment” refers to an RdSAP Assessment relating to premises where a Great British Insulation Scheme measure is installed, that is the most recent of any RdSAP Assessment for the premises issued before the measure was installed. The signatory must review the available evidence and records relating to the premises prior to signing this declaration.

Declaration

By signing, I, the social landlord, declare to the best of my knowledge and belief that:

Where a pre-installation RdSAP Assessment is used, no changes were made to the premises, after the preinstallation RdSAP Assessment was issued, and before the measure was installed which would increase the RdSAP Assessment energy efficiency rating of the premises to band D or above. I can confirm that the RdSAP Assessment is a true reflection of the property prior to the installation of the measure(s). The premises are let at below market rate, or where the premises are currently void, have previously and will be let at below market rate.³⁶

³⁶ Where social housing is let at or above the market rate, the property can be treated as a private domestic premises, where the of the occupant meets the eligibility requirements. See section on PRS from paragraph 3.85 The Great British Insulation Scheme Delivery Guidance for more information.

C. Child Benefit Self-Declaration	
<p>I, the occupier of the premises detailed above, declare that I am in receipt of Child Benefit and that for the corresponding number of qualifying children or young persons³⁷ within this benefit the single³⁸ or combined³⁹ annual gross income (from all sources). and is not greater than the amounts (the thresholds) indicated in the table below.</p> <p>I confirm that the information contained in this form is true and accurate. I acknowledge and understand that it is a criminal offence to knowingly make a false declaration and that the offence is punishable by a fine, imprisonment or both.</p>	
Child Benefit Number: ⁴⁰	
If no CHB Reference Number, please provide National Insurance number:	
<p>I, the relevant third party, declare that⁴¹, to the best of my knowledge, the person living at this premises detailed above is in receipt of Child Benefit; and is not in receipt of any of the other qualifying benefits listed in schedule 1 of the Electricity and Gas (The Great British Insulation Scheme) Order 2023.</p>	
Third Party Name and organisation:	
Third Party Signature:	Date:

³⁷ **Child and qualifying young persons means** a person under the age of 16 (or under 20 if they are in approved education or training). A person shall be treated as responsible for a child or qualifying young person who is normally living with them or paying at least the same amount as Child Benefit (or the equivalent in kind) towards looking after them. More detail can be found on the government website for child benefit.

³⁸ **Single claimant** means a person who is not a member of a Couple.

³⁹ **Couple means:** two people who are married to, or civil partners of, each other and are members of the same household; or two people who are not married to, or civil partners of, each other but are living together as a married couple.

⁴⁰ Your **Child Benefit number** starts with 'CHB' and is made up of 8 numbers and 2 letters. For example, CHB12345678 AB. This number can be found on your Child Benefit award notice or on any correspondence from the Child Benefit Office. You can also contact the Child Benefit Office online or by phone or post to get your number

⁴¹ **Relevant third party** means the person in the supply chain who has engaged with the consumer regarding the installation of The Great British Insulation Scheme measure. This could include, but is not limited to: the installer, operative, assessor or managing agent.

Type of claimant *	Number of children or qualifying young persons			
	1	2	3	4+
Single claimant annual income	≤£19,900	≤£24,800	≤£29,600	≤£34,500
Member of a couple combined annual income	≤£27,500	≤£32,300	≤£37,300	≤£42,000

*Note that you do not need to circle / mark the combination that matches your circumstances, the only confirmation required is to sign the declaration.

D. Data Use and Final Declaration (to be completed by all relevant document signatories)	
I hereby declare that all the information given above is true and accurate to the best of my knowledge	
<p>By signing this declaration, I confirm that I have received and read The Great British Insulation Scheme and ECO Reporting and Evidencing Forum Privacy Notice, available on the Ofgem website, to explain how my data will be used. This has also been shared with all members in the household who may be included or named in documents or information provided in the installation of this energy efficiency measure.</p>	
Customer full name:	
Customer signature:	Date:
Owner / landlord / social landlord full name:	
Owner / landlord / social landlord signature:	Date:

D. Sketch Plan and Instructions for all measure types

Room Key⁴²: BR= Bedrooms; LR = Living Room; K = Kitchen; D = Dining Room; BTH = Bathroom.

Wall Type key: Cavity/non cavity*; Adjacent to unheated space/corridor

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.

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 rails</p> <p>TWTRV = Towel rails with TRVs</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>

⁴² For multi storey premises, please record floor position, ie basement, ground floor, room-in-roof adjacent to the relevant sketch.

E. Retrofit Coordinator/Retrofit Assessor Declaration and Sign off

Details and Declaration		
1. Retrofit Coordinator/Assessor name		
2. Retrofit Coordinator/Assessor Trustmark License Number (TMLN)		
3. I confirm that the building was pre-existing before 1 April 2022	<input type="checkbox"/> Yes <input type="checkbox"/> No	
4. Retrofit Coordinator/Assessor Signature and date:		_ _ / _ _ / _ _ _ _