3 - Surveys and assessments on grant schemes

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Once you've applied for a grant scheme for energy improvements you will nearly always have a survey of your home before works can start.

A good survey will:

- Check the works are appropriate for you and your home.
- Identify any repairs that need to be done before works can start.

Before or after a survey, you may be told that you don't qualify for a grant scheme. This doesn't always mean your home isn't suitable for certain improvements. If you are told this, ask them to tell you why exactly.

Existing **retrofit standards** set some guidance on surveys, but there is currently no standardised way of doing them. This will change in the near future as a new standard is being developed (BS 40104). We'll update this information sheet when that happens.

It's important to stress that standards and accreditations are no guarantee that you'll get good quality.

This is why we encourage you to learn more about the different stages you'll pass through on your way to a cosier, more affordable home.

A good first step is feeling more confident about what to look for, and what to ask.

Applying for grants?

See our other sheets on:
1 - An introduction to home improvement grants
2 - An introduction to Retrofit Standards
4 - Getting into the detail (design)
5 - Before work starts
6 - When work is finished
7 - Mixing grant schemes with other funding

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Assessments and surveys: questions to ask

- [ ] Will it be one survey (in one go), or will there be several different surveys?

- [ ] Which parts of my home will you need access to?

- [ ] How long will the survey take?

A rushed survey is unlikely to cover much detail and may cause a problem later on.

An EPC or heat loss survey (including window measurements etc as now required) should take at least 1 hour. A full retrofit assessment including a condition survey (as required by PAS2035) should take longer. This could be up to 3 to 4 hours for large or complicated houses.

- [ ] Will you assess the condition of my home, from inside and outside?

If your home has leaks, cracks and damp, these will need fixing first. Otherwise there is a risk of problems, which won't always be easy to see if covered with insulation etc.

- [ ] Will you collect information about my energy use? (e.g. from bills or my meters)

This can help make the survey and any savings estimates more accurate.

- [ ] Will you collect information about how I currently heat my home? E.g. the temperature and times.

Most surveys assume you heat your home to 21 degrees Celcius. If you don't, it might be over or under estimating any possible savings.

- [ ] Will you do a ventilation assessment that meets Building Regulation requirements (Part F)?

The answer to this question should be "yes," and they should be able to show it and explain it. If not, then it is unlikely that ventilation has been considered properly. Going ahead without a proper ventilation assessment and strategy is very likely to cause problems.

Are you ready?

Tips for you to get ready for a survey.

- [ ] If you're able, clear routes to allow the surveyor access to all parts of your home.

  This includes things like loft hatches and meter cupboards.

- [ ] Get your energy bills or your smart meter data to hand.

After the survey

After the survey, ask the grant scheme provider (which may be the installer):

- [ ] Does the survey suggest any repairs are needed first? If so, what? How will these happen?
- [ ] Can I have a copy of the report?
- [ ] Can I have a copy of the input data?

Input data is all the data entry points, including measurements.
You are expected to have a copy of input data if you are applying to the Boiler Upgrade Scheme. But it's a good thing to ask for on any scheme.
Alongside the report, input data may help you understand why certain measures are recommended (or not).

- [ ] Are any other surveys needed? If so, what are these and why are they needed?