Small Print + Handy Hints

Warm and Well customer care

Warm &Well

severn wye

About this booklet

There's no place like home.

For twenty years we have been helping people in Gloucestershire and South Gloucestershire to make improvements to their homes. Improvements that help them use less energy and spend less on their bills. We do this by helping you access funding to make these upgrades at little or no cost to you.

Your home is special, so before any work begins to install energy-saving improvements, we want this booklet to do three things:

1. Help you understand the details of the Warm and Well service and how we will support you;
2. Make sure you always have a copy of the terms and conditions around grant funding to refer to; and
3. Give you some handy hints on what to look out for when the installation is happening.

Hang on to this booklet – it may come in handy!

How you can contact us

Website:	warmandwell.co.uk/contact
Email:	warmandwell@severnwye.org.uk
Facebook:	facebook.com/WarmandWellAdviceLine
Telephone:	0800 500 3076 available 9am–5pm Mon–Fri, leave a voicemail at any time
Events:	warmandwell.co.uk/events

Our website provides lots of information about how you can stay warmer and healthier in your home. It also has details about grant funding for insulation, renewable technologies and energy efficiency measures that might be available to you.

If you want to talk to us about energy advice or funding, you can phone us free of charge on 0800 500 3076 or email us at warmandwell@severnwye.org.uk.

About Warm and Well

Warm and Well offers energy efficiency advice to householders and administers grant funding on behalf of local authorities and other funders. The service is managed by sustainability charity Severn Wye Energy Agency on behalf of the seven local authorities in Gloucestershire and South Gloucestershire. We work closely with NHS Gloucestershire.

We can help:

– Provide you with advice about saving energy and reducing your costs
– Refer you to our network of approved installers or other partners who may be able to help
– Explain what funding for energy efficiency and energy saving is currently available, and what the eligibility criteria are
– Help you apply for funding and explain the conditions of different funding streams
– In some circumstances we may carry out a home visit, to offer you support. This might include help with applying for grants, carrying out an energy assessment, or giving you advice on making your home more energy efficient.

What you can expect from us

In providing you with support and advice we aim to:
– Ensure that our services are accessible. You can contact us by phone, letter, email or via our website.
– Respond to your enquiries promptly in a timely manner. The Adviceline is open Monday to Friday, 9am to 5pm excluding Bank Holidays.
– Provide you with tailored advice and guidance. All our Energy Advisors have received extensive training and they have access to a wealth of information about funding and energy advice.
– Support you and keep you informed. Sometimes applying for a grant or making energy efficiency improvements can be long. We aim to stay in touch throughout the process and offer you support when you need it.
– Check the quality of the service you receive. Feedback is really important to us. It helps us understand what we're doing well and what we could do better.
– Keep your information secure and confidential. We expect all installers we work with to keep your information safe in the same way.
– Work with others, in order to support you through advice, guidance or grant funded energy efficient measures. Sometimes the support we can provide may be limited, but we will always do our best to refer you on to other sources of support within our trusted network.

Just so you know, our team will be polite and treat all callers with respect. If you feel this has not been the case, please let us know. Likewise, we ask that you treat our team in the same way. All telephone calls to and from our advice line are recorded, and we keep copies of emails and voice messages for twelve months.

Warm and Well Grant Terms and Conditions

Grant approvals are subject to the following conditions. These conditions are subject to change and may be amended by the Warm and Well Steering Group at any time.

Application for Funding and Eligibility

1. The grant is subject to funding availability. Works must not start until the funding has been confirmed by Severn Wye. Any confirmation of funding will be made in writing.
2. Applicants must meet the current eligibility criteria in order to receive funding. Where applicants do not meet the eligibility criteria then funding cannot be approved. Eligibility criteria are set by funders, and Severn Wye administers the criteria.
3. An applicant's eligibility will be determined on the date their signed application is submitted. An applicant agrees to inform Severn Wye of any changes in circumstances (with regards to the eligibility criteria for grant funding). Where more than three months has passed since the date the application was submitted, Severn Wye reserves the right to re-assess eligibility.
4. Where requested, applicants agree to provide evidence related to eligibility (for example, evidence of identity, finances, tenure, benefits and health conditions). Where the applicant chooses not to provide evidence, this will render the applicant ineligible for funding.
5. In cases where the applicant meets the eligibility criteria for funding, but the cost of works exceeds the grant funding maximum and that additional funding cannot be met from another source or where all funding available through the scheme has already been allocated, Severn Wye reserves the right to reject the application for funding.

Private Rented / Part Ownership / Leasehold Properties

6. If the property is privately rented, the applicant must be the tenant. The tenant must meet the eligibility criteria for funding.
7. Written permission must be received from the landlord for the survey and for the works to go ahead. It is the responsibility of the tenant to get agreement from the landlord and/or to provide their contact details to Severn Wye as part of the application process. The landlord should understand that they may be required to contribute towards the costs of any energy efficiency measures as stipulated in the eligibility criteria. The landlord contribution should be agreed with the installer.
8. If the applicant partially owns a property, or the property is leasehold, the applicant is responsible for ensuring they meet appropriate consent requirements before the work is installed.

Information Management, Contract and Consent

9. By applying for grant funding, applicants consent to the use, retention and sharing of their personal information as stated in the Privacy Notice, in order to fulfil the contractual obligations of the grant scheme. Any personal data not required for the delivery of this contract is held with the consent of the client.
10. As part of the General Data Protection Regulation (2018) applicants can request to have their data erased or ask to know what information Severn Wye holds about them. Please refer to the Privacy Notice for information on data use, storage, retention and how to make a deletion or Subject Access request. Note that under certain schemes, Severn Wye may only be able to comply with requests in part, as some data will need to be retained in the public interest. For instance, where the scheme is provided through public funding, sufficient data must be retained for Government bodies to audit and verify the appropriate use of those funds.

11. As part of the contracted service that Severn Wye deliver, grant funding schemes are subject to evaluation and research following the installation of improvements. By applying for grant funding towards energy efficient measures, the applicant can expect to
    - be contacted by Severn Wye at certain points during and after the process to provide feedback on the service they have experienced from Severn Wye and appointed third parties (e.g., contractors);
    - be contacted by Severn Wye or their contractors for the follow up evaluation of the work and the impact of the measures they have received funding towards;
    - be contacted by Severn Wye for up to a year after the completion of the initial works with information about future funding and other energy efficiency opportunities that the applicant may benefit from and be eligible for;
    - have their address and property details shared with trusted third parties for the purpose of research and evaluation directly related to energy efficiency, net zero and funding impact related initiatives.

    In accordance with the GDPR, the applicant may exercise their right to restrict the processing their data to only certain elements of the contract if they wish.
12. In some circumstances, a survey and/or Retrofit Assessment may be required before funding is granted and/or work commences. In addition, an Energy Performance Certificate may need to be completed after the works have taken place. By receiving grant funding, applicants confirm that they agree to Severn Wye or contracted installers conducting the required surveys and assessments.

13. The completed Energy Performance Certificates for the property will be lodged with Severn Wye's preferred supplier and will be made available on the public register in accordance with statutory requirements. In addition, Severn Wye may share an Energy Performance Certificate and/or information about grant funded measures with third parties for the purpose of mapping, modelling, and calculating the savings to wider society as a result of the grant-funded works.

Grant Funding and Client Contributions

14. Where an applicant is deemed eligible for funding for works, Severn Wye will allocate an installer from a list of approved installers. The installer will provide a quote to Severn Wye and/or the client, detailing the amount of grant funding and, for schemes where a customer contribution is permitted, any additional customer contribution that is required.
15. Any costs of the works above the grant funding maximum are the responsibility of the applicant. The applicant will need to source and agree with the installer to pay any costs above the grant funding maximum before the work goes ahead.
16. Where the cost of work exceeds the grant funding maximum, Severn Wye reserves the right to deem the applicant ineligible for funding.

Agreements and Responsibilities

17. The agreement for the works is between the applicant and the installer. Severn Wye, the funder and the local authorities are not responsible for the works. If there are any disputes between the applicant and the installer, Severn Wye may liaise with the installer on behalf of the applicant but bears no responsibility for the works or resolution. See our Complaints and Appeals Procedure.
18. It is the responsibility of the applicant to ensure that any necessary planning or Building Regulations permission is in place prior to the commencement of any works. The applicant is responsible for obtaining planning / Building Regulations permission, where required, and all costs associated with applying for such permissions.

Completion of Works

19. If satisfied with the works, the applicant must sign and return the completion certificate or customer feedback form once the works have been installed (to be provided and returned by the installer). If the applicant is not satisfied with the works, they must inform the installer and arrange with the installer for this to be resolved. The installer is responsible for the completion and quality of the works, in accordance with the required standards.
20. On completion of the works the grant will be paid directly to the installer. Severn Wye will not retrospectively fund works completed prior to any agreement with the installer and/or the applicant. Severn Wye will not make any payment directly to the applicant.
21. The grant will not be paid until the applicant has completed the customer satisfaction survey or completion certificate stating that they are satisfied with the works carried out and have received any information and advice from the installer about the operation of the system and/or on-going maintenance. In cases of dispute, Severn Wye reserves the right to make a payment to the installer without this form.
22. Severn Wye may refuse to pay any grant funding if:
    a. Severn Wye determines that the approval of eligibility for funding was made on the basis of incomplete or inaccurate information provided by the applicant.
    b. Severn Wye ascertains that the works were started prior to the application being approved.
    d. The works were not carried out by the contractor allocated by Severn Wye or whose quote for works was submitted to Severn Wye.
    e. There is a breach of any of the grant conditions.
23. Severn Wye may vary the amount of grant to be paid where:
    a. Severn Wye ascertains that the works were completed for a cost lower or higher than the amount approved.
    b. Severn Wye determines that further eligible works are required in addition to those contained in the application which could not reasonably have been foreseen at the time of the application.
    c. The eligible works cannot be carried out on the basis of the estimates submitted with the application.
24. Where applicable, applicants will be required to pursue any relevant insurance claims relating to the specified works and assistance will not be given towards such works or towards works which would have been eligible but for the applicants' failure to take out reasonable insurance cover. Assistance will not be available in respect of insurance 'excesses'.
25. Where an applicant sells the property, moves or is deceased prior to the certified date of completion of the works then Severn Wye may at its discretion pay the grant in respect of any works that have been completed to date.
26. If the applicant decides not to go ahead with the work, they must notify the installer and Severn Wye immediately as the funding can then be reallocated.

How we will use your information

What we may ask you about

So that we can give you the right advice or assess whether you are eligible for grant funding, we need to ask you questions about yourself. Eligibility for funding is often based on factors such as where you live, your personal circumstances (such as age or health conditions), whether you own or rent your home and what type of home you live in. We will always explain why we are asking these questions and ask for your permission to record your information, and where appropriate, share it with an installer or other organisation.

How we use your information

Depending on the service we are providing, we use your data in a variety of ways. Sometimes we are required to share or store some of your data so that there is a record of how public funding has been used. We will use your information to contact you to provide feedback on the service you have received, but you may also give us permission to contact you with information about other funding opportunities that arise. Remember: you have the right to request that we change what we store about you and how we use it.

How we keep your information safe

We store your information in our secure information management system. For more information about how we store and use your data, read our Privacy Notice at warmandwell.co.uk/privacy. We expect the installers we work with to have similar processes in place to keep your information safe and secure.

If you are not happy with our service

From time to time things do go wrong, and we want to ensure that you know how to contact us and what will happen when you feel this has happened.

We have a complaints policy that explains how you can make a complaint about the service you have received or appeal against a decision about your eligibility for grant funding. In the first instance you may wish to discuss the matter before you make a complaint. You can call our adviceline on 0800 500 3076. They'll be able to discuss your concerns with you and, where appropriate, forward your concerns or details to the most appropriate person.

You can also make a complaint by phone or letter, by emailing us at complaints@severnwye.org.uk, or by filling out the complaints form at warmandwell.co.uk/complaints.

If you are unhappy about service or work from an installer, in the first instance you should contact the installer directly. If they are unresponsive or not able to help, please contact us and we will endeavour to liaise with the installer on your behalf.

Severn Wye undertakes ongoing checks of contractors. One of the main ways this is achieved is by collecting feedback from clients following the installation of energy efficiency measures, to assess whether they were happy with the work carried out.

Your checklist for a smooth installation

We work with a network of installers to deliver grant-funded energy efficiency measures, and require them to have arrangements in place for keeping you and your property safe. For some schemes, we require installers to have a TrustMark registration. TrustMark is a UK Government endorsed quality scheme for work carried out in and around your home.

If you are approved for funding, the contractual agreement for the work will be between you and the installer.



Before the install, you should:

- ☐ Make sure you understand what is being installed and what work is needed to do this
- ☐ Check whether you need planning permission
- ☐ Find out if the work is fully funded or whether you need to contribute
- ☐ Read and check the contract provided by your installer, query any concerns and seek advice if required before signing it
- ☐ Find out how your installer will use and store your information
- ☐ Ask when the work will be carried out and who will be doing it
- ☐ Make sure you have your installer's contact details

Once the work has been completed:

- ☐ Ask your installer to show you the work that's been carried out
- ☐ Check the area of work for damage and the quality of the finish
- ☐ Ask your installer to explain how your new system works
- ☐ Ask your installer to explain what maintenance you may have to carry out to the system
- ☐ Make sure you have copies of guarantees and warranties

Keeping you safe

At Warm and Well we're committed helping residents take advantage of legitimate funding opportunities and providing them with expert, impartial advice. However, sometimes it's difficult to tell if an offer is genuine or a scam, especially as receiving grant funding can sometimes feel 'too good to be true.'

We encourage all residents in Gloucestershire and South Gloucestershire to 'Take Five' if they're not sure whether an offer is genuine or could be a scam. Take Five is a national campaign offering straightforward, impartial advice that helps prevent fraud.



1. **STOP.** Take a moment to think before parting with money or information.
2. **CHALLENGE.** Ask yourself, could this be fake? It's okay to reject, refuse or ignore requests you're unsure of.
3. **PROTECT.** If you think you've fallen foul of a scam and have parted with some money, contact your bank immediately. Report it to Action Fraud, the National Fraud and Cyber Crime Reporting Centre.

You can only access Warm and Well grant schemes through proper channels. Our advisors will encourage you to be wary of any offers that seem too good to be true and remind you that safety and security are the most important considerations when it comes to updating your home. If it doesn't feel right, take five and remember you can always call us on 0800 500 3076.