



Ecofurb Plan service terms and conditions **(updated 28/03/2024)**

GENERAL

1 The Service

The Ecofurb Plan (“Service”) delivers expert and impartial advice on how best to improve the energy efficiency of a home, tailored to the individual property and the people who own and/or live in it. It is detailed in part 2 of this document.

2 The Consultants

Ecofurb works with Retrofit Assessors, Retrofit Coordinators and other Competent persons, with sufficient knowledge and experience, to deliver Ecofurb Plans.

3 Terms of Payment.

The Whole House Plan fee shall be paid for in advance, through an online payment. Ecofurb will be in touch within three working days to set a date for the Home Survey.

4 Cancellation

We require notice of any cancellation or postponement of your appointment, including rescheduling due to poor weather. We will do a weather check two days in advance. You are entitled to cancel this contract by notifying the Ecofurb booking service by 5pm the working day (Mon-Fri, excluding bank holidays) prior to the appointment.

If you request to cancel after 5pm the working day prior to the appointment, and do not wish to proceed with the Plan unfortunately there will be a cancellation charge and we will apply a partial refund.

If you postpone after 5pm the working day prior to the appointment, there will be a cancellation charge and we will be in touch to book another mutually convenient time.

If for some reason a Consultant cannot attend on the planned date, our aim is to give you notice and find another mutually convenient time. If the Ecofurb

Consultant cancels with less than one working day's notice, the customer will be offered options include postponement or a full refund if the Customer does not wish to continue with the Ecofurb Plan service.

If the Consultant has attended the property at the agreed time, and found they cannot complete the survey, Ecofurb may offer a partial refund as the full Ecofurb Plan service cannot be delivered, or a postponement. This can include reasons, such as:

- No access or refused access, including no responsible adult (over 18) in the property
- The property is unsuitable for retrofit works, in the opinion of the Consultant
- The Consultant is unable to complete the survey due to access issues, whether due to the property and its contents, or the occupants of the property
- The Consultant chooses to leave for reasons of the safety and welfare for themselves or others

6 Liability

The Plan provided is solely for your use and no liability to anyone else is accepted. We are not liable for design or installation work completed as a result of the advice from this document.

7 Complaints Handling Procedure

All complaints will be logged against your customer record in our CRM system. They will be allocated to the Ecofurb Manager who will own the complaint, investigate and resolve.

Any complaints lodged against our service will be responded to within 2 working days with a target customer resolution of 5 working days post contact.

The primary contact to e-mail in order to lodge a complaint is support@ecofurb.com

8 Independence

Advice provision by Ecofurb and its survey partners is financially independent of suppliers and manufacturers. In general, brand names are not included in the plan.

9 Exclusions

The following areas are beyond the scope of Ecofurb Plans:

- Calculations for final sizing of required renewables products, a technical survey is required specific to the installer.
- Calculations for final sizing of required materials for insulation, a technical survey may be required specific to the installer.
- Specific advice relating to brand named heating systems, , a technical survey is required specific to the installer.
- Advice on specific brand name materials, including established and new-to-market products
- Future building extensions – our service is limited to existing buildings. This can be quoted for as an addition to the basic service.

DESCRIPTION OF THE SERVICE

A The Service

A1 The Basic Ecofurb Plan comprises:

- A survey of your home (Section B);
- A homeowner (or relevant party) survey (Section C);
- A plan based on the two Surveys (Section D);

A2 For older or larger homes, and more complex projects we will recommend the full Ecofurb Plan, which comprises:

- The Basic Ecofurb Plan, plus
- 3D Survey – creates a 360° digital simulation of your property to support complex advice
- Drone photography to inform advice on walls and roofs, including solar panels
- Architectural Elevations

A3 Ecofurb aims to give you a Plan that sets out a route for achieving environmental or energy efficiency gains by improving your property through:

- Identifying areas of the property where significant improvements can be made to reduce energy bills and CO₂ emissions by employing energy saving systems and equipment such as the installation of insulation, heating and energy generating equipment.
- Advising on the systems and materials (typically non branded) that are readily available in the market and the estimated cost of installation.
- Ranking the options available to you to help you make decisions.

A4 Additional services will be made available over time, where relevant to the property or the owner's aims. These will be charged for separately, and include options such as inclusion of planned extensions, heat pump technical design and air pressure testing.

B The Home Survey

B1 The Home Survey is a general surface examination of those parts of your home which are accessible to assess its energy performance. Please note that the term "Survey" referred to in these terms are not a Building Survey and therefore the Whole House Plan will not report on the condition of the fabric or structure of the building being surveyed. If you require a building survey it is advised that a Member of the Royal Institution of Chartered Surveyors, who is competent to survey, value and report upon the property is engaged.

Access is defined as visible and readily available for examination from ground and floor levels, without risk of causing damage to the property or injury to the Consultant.

Due care is therefore exercised throughout the survey regarding safety, practicality, and the constraints of being a visitor to the Property. Items such as furniture, floor coverings and other contents are not moved or lifted by the Consultant. The client is welcome to provide inspection holes etc in various parts of their house at their own risk e.g. removing recessed spotlights to allow visibility behind, cutting section of plasterboard out of sloping roof areas and lifting floorboards.

B2 The services are inspected (in the case of flats the public areas outside of the property are excluded), and an assessment of the efficiency of lighting, water and space heating systems is made.

B3 Leisure facilities and outbuildings are not included. Clients seeking Plans for more than five homes should contact us to review more appropriate and cost-effective service options.

B4 The following, whilst not required, should be made available on the agreed date of the survey to be most effective:

- Access to loft or other roof voids (if applicable).
- Access to boiler and other major components of the heating system (tanks, timers, valves etc.).

B5 The quality of Ecofurb Plans is dependent on the information gathered during the survey and provided by you in the Client Survey (see below). Where it is not possible to obtain access to a part of the property, then assumptions will be made on the construction of the parts that cannot be accessed based on RdSAP and PAS 2035 guidelines.

C The Homeowner Survey

C1 You will be asked to complete an online survey relating to your home, energy efficiency work that you have already completed, and your aims for retrofit. Please return this before the Home Survey as our Retrofit Coordinators require it to start developing your Plan.

C2 The aim of this survey is to add detail to the information collected from the home survey. It will help us tailor your plan to your aims and objectives, and capture information that is not visible to the surveyor.

C3 Where you provide information additional to that which is visible to the Consultant in the Home Survey, that can be considered in the Plan development. Ecofurb and the Consultant will seek as much information as may be available but are not liable for any costs arising from inaccuracies in the information provided.

C4 You will be asked some questions that will indicate if you could be eligible for certain types of grant-funding. If you give consent, you will be sent an additional form to sign your agreement to an eligibility check with the relevant Government Department.

D The Plan

D1 The plan will provide you with sufficient information to enable informed decisions on the use of your property, the installation of efficient heating and electric systems and insulation that will reduce energy consumption and reduce CO₂ emissions. The plan will set out:

- Recommendations for the property that will achieve, or work towards, your target, whether that is cost or carbon-focussed.
- Appropriate renewable technologies and calculations of their savings and potential revenues.
- As there are an inexhaustive number of potential interventions, we will use our judgment, along with information particular to you, such as your priorities and budget, to evaluate a finite number of appropriate measures for the situation.
- We will include all measures evaluated but these should not be seen as recommendations. Some measures may be evaluated to show that they are either suboptimal or in some circumstances, detrimental in terms of cost or CO₂.
- If any substantial measures are deemed to be omitted, and are possible to be evaluated by our software, then these will be further evaluated at no additional cost. Where they have a substantial impact on the plan, the plan

will be reissued. Where they are minor, information will be provided via email.

D2 The Plan is in a standard format arranged in the following sequence:

Introduction.

- Quick Read Summary
- Current Performance
- Potential Improvements
- Next Steps

D3 Recommendations will be made based on the latest available quantifiable information and knowledge on materials and systems, and you are invited to a call with the Consultant to discuss those recommendations.

D4 The call can be most helpful if carried out within 4 weeks as the Consultant has recently completed the Plan. If the call does not happen within 4 weeks due to Client non-responsiveness, there is no further obligation on the Consultant to hold the call, and the Service is considered complete. It is at Ecofurb's discretion whether a call can be arranged more than 4 weeks after the survey.

D5 If additional time beyond 30 minutes is requested, we can provide a quotation for the requested call.

E Data

E1 Plan Builder is the name of our software that provides online advice. It uses data from our national housing dataset, known as Pathways. Property data relating to the construction, fabric, lighting and heating systems of the property collected during the survey will be entered into Pathways. This means the publicly accessible Plan Builder will reflect more accurate information and be more useful. Pathways and Plan Builder do not hold or publish any personally identifiable data, and only a summary of the property's home energy performance data is visible. Should you wish for your survey data to be excluded from Plan Builder then please let us know at support@ecofurb.com.

E2 The availability and use of data in Parity Projects Pathways and Plan Builder software is limited by the terms governing the use of the Government's Energy Performance Certificate data.

E3 Should you use Ecofurb's follow on services to implement some of your retrofit journey we will also update the data in our Pathways system to reflect installed measures. If you wish installed measures excluded from Plan Builder then let us know at support@ecofurb.com.