



# ECO4 Retrofit Compliance Checklist

## Nature-Society Homeowner Guide

Use this form to review whether your ECO4-funded retrofit complies with PAS 2035, PAS 2030, MCS (where relevant), TrustMark, Building Regulations, and the statutory Home Heating Cost Reduction Obligation (HHCRO). Tick Yes/No/N/A and add notes or evidence. Any No may indicate non-compliance and can be used for escalation.

### Homeowner & Project Details

Property address:	
Installer (company):	
Obligated energy supplier:	
TrustMark Project/Works ID:	
Dates of installation (start-finish):	
Technologies/measures installed:	

### Project Oversight & Roles (PAS 2035)

Item	Yes	No	N/A	Notes / Evidence
A named Retrofit Coordinator was appointed and disclosed to you in writing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
You received a whole-dwelling assessment (condition, energy model, ventilation/moisture, occupancy, heritage/planning).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
A formal vulnerability and occupancy assessment was undertaken and recorded; appropriate measures/support were planned.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Intended outcomes were agreed and recorded (e.g., reduced energy use and costs, improved IAQ, damp/mould elimination, reduced CO2, overheating risk reduction).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
A Medium-Term Improvement Plan (MTIP) was provided for your dwelling, with sequencing and monitoring.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
A written contract/works order set out scope, responsibilities, price, warranties, complaints/change-control.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Coordinator conducted/recorded site visits and any non-compliances.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Post-installation evaluation (at least basic evaluation) was completed/scheduled and issues tracked to resolution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

### Design & Specification (PAS 2035)

Item	Yes	No	N/A	Notes / Evidence
A Retrofit Designer produced a retrofit design package: drawings/specifications for measures and junction details.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Item	Yes	No	N/A	Notes / Evidence
Pre-existing defects that could compromise outcomes (e.g., damp ingress, leaks, structural faults, inadequate ventilation) were identified and specified for remedial action prior to installation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Confirmation was provided that those defects were resolved before measures were installed (no works proceeded until enabling works/remedials were completed).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
A ventilation strategy and moisture management to BS 5250 were included.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
An airtightness strategy/target was set; air-leakage testing planned where appropriate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
The design included testing, commissioning and handover requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
You were given retrofit advice before/during/after works on operating the home efficiently.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Where a distress replacement occurred, the project was brought into full PAS 2035 compliance as soon as practicable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## Installation Quality (PAS 2030 / MCS / Building Regulations)

Item	Yes	No	N/A	Notes / Evidence
Installers were PAS 2030 certified (or MCS for microgeneration) and evidence was provided.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Where a heat pump/solar/battery was installed, the company and design were MCS certified for that technology.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Room-by-room heat-loss calculations and system sizing/schematics were shared (e.g., MIS 3005 for heat pumps).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
All relevant Building Regulations approvals/compliance evidence provided (e.g., electrical, ventilation, structure, flues).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
No unapproved on-site design changes were made; any changes were re-approved by the Coordinator/Designer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Commissioning sheets, test results (e.g., flow temps/pressures, air-tightness where applicable) and benchmarks were provided.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## Outcomes & HHCRO (Home Heating Cost Reduction Obligation)

Item	Yes	No	N/A	Notes / Evidence
Post-installation, your home is cheaper to heat (heating bill reduction evidenced or credible projection).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Comfort has improved and the dwelling is heatable to reasonable living temperatures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Item	Yes	No	N/A	Notes / Evidence
Damp/condensation/mould have been eliminated or reduced to normal tolerances.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ventilation works as intended; no persistent IAQ issues or overheating emerged.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Supplier/installer explained how the measures contribute to ECO4 Annual Bill Savings (ABS) targets and your actual bills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## Documentation & Handover

Item	Yes	No	N/A	Notes / Evidence
You received a written contract and any required notices (e.g., cancellation rights) before works started.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
You received user manuals, settings, and maintenance instructions for all systems.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
You received warranties/guarantees and product serials/certificates (including MCS certificates if applicable).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
You received an updated improvement plan or recommendations for future phases.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TrustMark registration confirmation and any data-warehouse uploads were provided/visible.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Contact details for post-installation support and remedials were provided.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## Evidence Pack (attach copies or photos)

Item	Yes	No	N/A	Notes / Evidence
Pre- and post-install energy bills (heating fuel).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Occupancy schedule and heating set-points before/after.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Whole-dwelling assessment report (incl. photos of defects).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Heat-loss calculations / sizing sheets / schematics (MCS MIS 3005 where relevant).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Design package with junction details, ventilation and airtightness strategy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Commissioning sheets, benchmark logs, test certificates (electrical, pressure, airtightness, water quality).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TrustMark registration, PAS 2030 installer certificate(s), MCS certificate(s).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Photos of installed measures and any defects/non-compliances.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

## Escalation Pathway (who to notify and in what order)

Who	What to say/do
1. Installer (principal contractor)	Formal complaint citing PAS 2035/2030 non-compliance and failure to deliver HHCRO outcomes.
2. Obligated Energy Supplier	Notify statutory HHCRO breach; provide evidence; request remedial plan and costs cover.
3. TrustMark	Quality/standards complaint referencing PAS and consumer charter; include Works ID.
4. Ofgem (ECO4 administration)	Inform of suspected supplier non-delivery of ABS/HHCRO outcomes with evidence (systemic issue).
5. ADR / Scheme bodies (e.g., HIES/RECC/NICEIC/MCS)	If member, escalate under their dispute procedures.

## Sign-off & Notes

Homeowner name & signature:		Date:	
Coordinator/Installer representative:		Date:	
Overall assessment (circle):	Compliant / Part-compliant / Non-compliant		

This checklist is a plain-English aid based on PAS 2035:2023, PAS 2030, related MCS standards, TrustMark rules, and ECO4's HHCRO/ABS framework. It does not reproduce standards text and is not legal advice.