01 / YOUR HOUSEHOLD BRIEF

What matters in your home?

Start with the upgrade you need now, such as replacing unreliable gas or oil heating. Record later solar or battery ideas separately. Use "not known" for gaps; assessment and design remain separate.

Home / project reference

Date / version

YOUR TOP THREE PRIORITIES

1. Most important outcome
For example: replace unreliable heating. Record the urgency.

2. Next priority

3. Further priority

Household routine
Who is home and when? Heating, hot water, room use or electricity-use patterns.

Already confirmed
First-phase work or equipment changes.

Possible later changes
Solar, battery or other options for later.

Budget, timing and practical limits
First-phase funds, heating urgency, access, disruption or space. Keep unconfirmed support separate.

02 / YOUR SURVEY QUESTIONS

What needs an answer?

Bring bills or usage records, available plans, your Energy Performance Certificate and relevant equipment paperwork. Date old information. Describe observations without guessing the cause.

Ask about heating and hot water, equipment space, solar roof checks, battery compatibility and any work by other trades. Note property concerns. Do not enter unsafe spaces or open equipment.

1. Question / observation

Who will answer?

Response date

Answer or document needed to decide

2. Question / observation

Who will answer?

Response date

Answer or document needed to decide

3. Question / observation

Who will answer?

Response date

Answer or document needed to decide

Mark each answer as confirmed, still open or not applicable. Keep the written advice with this sheet. Print another copy if you need more space.

03 / YOUR QUOTATION COMPARISON

Compare the same phase

Give each quoting business the same dated brief. Write included, excluded or not confirmed, then add the detail. Different prices may reflect different work or design assumptions.

Phase / brief version being compared

What to compare	Proposal A	Proposal B
Business, quote reference and date		
Scope, equipment and design assumptions		
Other work, exclusions and provisional costs		
Total, payment stages and validity date		
Performance estimate: assumptions and limits		
Handover, warranties and aftercare		

Differences to resolve before choosing

Ask the businesses to explain significant differences in writing.

04 / YOUR NEXT PHASE

Record the next decision

Plan the next decision while information is incomplete. Confirm an installation date only when agreed. Use a separate copy for each phase and keep the latest version with your project records.

Phase and outcome (for example: heating replacement)

Decision to make / information needed first
Survey, design, scope, cost and any confirmed support for this phase.

Person responsible for the next action

Decision / review date

Budget and scope status
Agreed, provisional, excluded or not known.

Timing and dependencies
Urgent needs, target dates and dates agreed.

- [ ] Proceed
- [ ] Revise
- [ ] Defer
- [ ] Not decided

Decision, reason and date

HANDOVER AND FOLLOW-UP

- [ ] Agreed scope / changes stored
- [ ] Relevant completion documents
- [ ] Controls explained / manuals held
- [ ] Warranty / support contact held

Open items, responsible person and review date

Sources and scope

Original EPC planning prompts. No grant eligibility, project outcome or technical compliance is established by completing this worksheet. Professional assessment remains separate.

Energy Saving Trust: Retrofit explained

GOV.UK: Find ways to save energy in your home (England and Wales)