Section 20:
Customer Consultation

Contacts (Lots) 1
Home Investment and Retrofit

January 2026

Home Investment Component	Scope of work
Customer Enhancements	• Customer requests the contractor fit non-standard enhanced components.
Kitchen Replacement	• Design Visit. • Asbestos Survey and Removal. • Pre Works Inspection – Customer requirements and specification check. • Removal of all units, worktops, tiles and floor coverings. • Based on the new design replace any supply or waste pipework due to condition or repositioning of appliances. • Provide fully compliant power sockets and switched fused spurs for appliances as per the specification and light fittings and switches, this may require the kitchen ring to be rewired and the consumer unit to be upgraded to ensure the installation is compliant with current standards. • Replace/provide new mechanical extractor if none present, in need of repair or not compliant with specification. provide heat detector if none present, expired or not compliant with specification. • Provide and install new units, worktops and floor coverings. • Make good to plaster ready to receive decoration, paint all walls and ceilings. • Clean and remove all waste. • Explain, demonstrate and leave the maintenance and operating instructions with customer.

Bathroom Replacement	• Asbestos Survey and Removal. • Pre Works Inspection – Customer requirements and specification check. • Remove all sanitaryware, tiling and floor coverings. • Based on the new design replace any supply or waste pipework due to condition or repositioning of sanitaryware. • Provide and install including all wiring a new light fitting. • Provide and install a new extractor fan if the existing one does not meet the specification, is due for replacement due to age and condition or there is not one present at all. • Provide and install an electric shower above the tap end of the bath. • Provide and install a shower curtain and rail. • Tile a splashback above the handbasin (3 rows) and full height within the perimeter of the bath. • Install bath end and side panels as appropriate. • Provide and install floor covering. • Clean and remove all waste. • Explain, demonstrate and leave the maintenance and operating.
WC / Cloakroom replacement	• Asbestos Survey and Removal. • Pre Works Inspection – Customer requirements and specification check. • Remove all sanitaryware, tiling and floor coverings. • Based on the new design replace any supply or waste pipework due to condition or repositioning of sanitaryware. • Provide and install including all wiring - if necessary, a new light fitting and switches.

	• Where the Cloakroom as no direct ventilation to the outside, provide and install a new extractor fan if the existing one does not meet the specification, is due for replacement due to age and condition or there is not one present at all. • Provide and install new sanitaryware and tiled splashbacks, including a wash handbasin where one does not currently exist, including all new hot, cold and waste plumbing. • Provide and install new sheet vinyl floor covering. • Make good to plaster and decorate all walls and ceiling. • Clean and remove all waste. • Explain, demonstrate and leave the maintenance and operating instructions with customer.
Domestic Electrical Power and Lighting Rewire/Upgrade	• Evaluate the recommendations from the Electrical Periodic test certificate. • Site visit to survey the home to identify any issues with completing the work and consult with customer. • Liaise and Co-ordinate with the energy network provide to install a double pole isolator if one is not currently present. • Asbestos survey and removal. • Pre-works visit to discuss the level of disturbance with the customer. • Undertake the rewire/upgrade works. • Make good damage to decorations (walls ceilings and floors). • Clean and remove all waste and debris. • Quality check the works and documentation provided by the installing engineer. • Provide the required certification and any other information required for handover to the client.

Commercial/Communal Electrical Power and Lighting Rewire/Upgrade	• Evaluate the recommendations from the Electrical Periodic test certificate. • Site visit to survey and measure the building to identify any issues with completing the work. • Design the lighting system to provide the required level of lighting. • Liaise and Co-ordinate with the Energy network provider as required. • Asbestos survey and removal. • Consultation with the Scheme staff. • Consultation with the scheme residents. • Undertake the rewire/upgrade works. • If the lighting has significantly changed it may be required to supply and install a new suspended ceiling system. • Make good damage to decorations (walls ceilings and floors). • Clean and remove all waste and debris. • Quality check the works and documentation provided by the installing engineer. • Provide and position in the electrical cupboard a fully labelled and annotated schematic drawing of the installation. • Provide the required certification and any other information required for handover to the client.
Heating	• Design and heat loss calculations. • Asbestos Survey and Removal. • Pre Works Inspection – Customer requirements and specification check. • Full and complete removal and disposal of the current system including all secondary appliances, ancillary tanks and vessels if no longer required.

	• Installation of heating appliance including all pipework and wiring. • Installation of appropriately located heating controls and thermostat. • All habitable rooms to be provided with a suitably sized heat emitter. • The heating distribution system has a longer lifecycle than the main heating appliance therefore if it is not due for replacement, carry out a check of the system and carry out any minor repairs or replacements as necessary and pressure test and power flush to confirm the system is free from leaks and blockages. • All radiators to be provided with TRVs. • Provide and install a hardwired CO detector in every room where there is a fossil fuel burning appliance if none present of the existing one is battery operated or in need of repair or expired. • Make good damage to any walls, floors and ceilings, ensuring no holes around pipe penetrations and decommissioning and boarding up any redundant flues. • Clean and remove all waste. • Explain, demonstrate and leave the maintenance and operating instructions with customer. • Submission of installation and commissioning documents to Building Control for approval. • Register the guarantee on behalf of the client and provide all documentation to the client.
Doors (including Fire Doors)	• Design Visit and Pre Works Inspection – Customer requirements and specification check. • Asbestos Survey and Removal. • Remove the existing door and frame. • Provide or replace a lintel if required.

	• Install the new door and frame. Ease and adjust to ensure smooth operation. • Clean and remove all waste. • Explain, demonstrate and leave the maintenance and operating instructions with customer. • Register the guarantee for the door and frame on behalf of the client and provide with all necessary handover information and certification.
Windows	• Design Visit and Pre Works Inspection – Customer requirements and specification check. Accurately measure all openings and identify windows that require ventilation, lintels, fire escape or toughened glazing. • Asbestos Survey and Removal. • Deglaze the windows, remove the frames and dispose. • Provide or replace the lintel if required. • Install the new window frames and fill any gaps around the frames with expanding foam and trim. • Provide and install the new double glazed sealed units. • Internally, provide white UPVC cover strips to cloak any damage to the reveals, head and sill and mastic seal to finish. Mastic seal to finish externally. • Clean and remove all waste. • Submitted the required installation documentation to FENSA and register any guarantees for the window frames and glazing on behalf of the client. • Provide the FENSA certification and guarantees for frames and glazing to the client.

Pitched Roof	• Inspect the property to identify any repairs, anomalies, structural issues, Overhead power cables or telephone lines. Gas flues, PV panels, etc. • Liaise with statutory bodies to temporarily relocate or protect cables. • Erect scaffolding and temporarily relocate any satellite dishes that are obstructed to ensure signals are received. • Decommission any gas appliances that may have part of their operation affected by the works, typically flues. • Disconnect and ducting to tile vents. • Disconnect and remove any solar panels and protect against damage. • Strip of all roof tiles, battens and felt. • Strip off all Fascias, soffits, gutters and rainwater goods if these are due for replacement due to condition or age. • Dispose of all waste. • Ensure all fire separation between dwellings is present, in condition and has the appropriate fire stopping at the party wall. • Carry out any repairs as necessary to the roof structure. • Provide new UPVC fascia, soffit and rainwater goods. • Provide and install new underfelt, battens and roof tiles, including any eaves ventilation and vermin guards. • Reconnect all ducting to the new tile vents ensuring no sagging and collection of condensate. • Carry out any repairs/repointing to chimney stacks and ensure all lead flashing is replaced/redressed as necessary. • Recommission any gas appliances affected by the works. • Re-install and recommission any solar panels.

	• Top up loft insulation to a minimum of 300mm. Ensure the loft hatch is insulated. • Remove all scaffolding. • Remove all waste and debris. • Register the installation with the National Roof Contractor's scheme or Building Control. • Provide all handover documents and certification to the client.
Flat Roof	• Inspect the property to identify any repairs, anomalies, structural issues, Overhead power cables or telephone lines, gas flues, etc. • Liaise with statutory bodies to temporarily relocate or protect cables. • Erect scaffolding and temporarily relocate any satellite dishes that are obstructed to ensure signals are received. • Decommission any gas appliances that may have part of their operation affected by the works, typically flues. • Strip off roofing membrane. • Strip off all Fascias, soffits, gutters and rainwater goods if these are due for replacement due to condition or age. • Dispose of all waste. • Ensure all fire separation between dwellings is present, in condition and has the appropriate fire stopping at the party wall. • Carry out any repairs as necessary to the roof structure (decking, firings and joists). • Provide new UPVC fascia, soffit and rainwater goods. • Provide new flat roofing system with insurance backed guarantee. • Provide and install new rigid installation boards, including any eaves ventilation and vermin guards. • Ensure all lead flashing is replaced/redressed as necessary.

	• Recommission any gas appliances affected by the works. • Remove all scaffolding. • Remove all waste and debris. • Register the guarantee for the installation on behalf of the client. • Provide all completion document and certification to the client.
Roofline	• Inspect the property to identify any repairs, anomalies, structural issues, Overhead power cables or telephone lines. Gas flues, PV panels, etc. • Liaise with statutory bodies to temporarily relocate or protect cables. • Erect scaffolding and temporarily relocate any satellite dishes that are obstructed to ensure signals are received. • Decommission any gas appliances that may have part of their operation affected by the works, typically flues. • Disconnect and ducting to tile vents. • Disconnect and remove any solar panels and protect against damage. • Strip of the first 3 rows of roof tiles, battens and felt. • Strip off all Fascias, soffits, gutters and rainwater goods if these are due for replacement due to condition or age. • Dispose of all waste. • Carry out any repairs as necessary to the rafter feet. • Provide new UPVC fascia, soffit and rainwater goods. • Provide and install new underfelt, battens and roof tiles, including any eaves ventilation and vermin guards. • Reconnect all ducting to the new tile vents ensuring no sagging and collection of condensate.

	• Carry out any repairs/repointing to chimney stacks and ensure all lead flashing is replaced/redressed as necessary. • Recommission any gas appliances affected by the works. • Re-install and recommission any solar panels. • Top up loft insulation to a minimum of 300mm. Ensure the loft hatch is insulated. • Remove all scaffolding. • Remove all waste and debris. • Provide all handover documents and certification to the client.
External Decoration	• Inspect the property and assess the level of repairs required to all exposed previously painted or stained timber and masonry. • Carry out all necessary stripping back of paint and surface and scraping of loose material wipe down. • Carry out all repairs (resin filling, splicing, replacement) to timber and masonry elements. • Prepare the surfaces for painting. • Protect paths and customer property from paint splashes. • Apply the required coats of paint (Primer for bare wood, 1 undercoat, 2 finish coats). • Wash down and clean externally all UPVC products with UPVC cleaner (windows, doors, fascias, soffits, rainwater goods). • Ease and lubricate all window and door hinges and locking mechanisms and carry out minor repairs.
Internal Communal Area Decoration	• Includes all previously painted or wall papered surfaces, suspended ceilings and floor coverings in communal parts of blocks. • Inspect all surfaces to identify repairs required. • Attend Consultation meeting with residents.

	• Temporarily remove any way finding or fire signage and set aside. • Prepare surfaces for decoration. • Apply the required coats of paint (1 under coat, 2 finish coats). • Apply wallpaper to appropriate walls. • Refix wayfinding and fire signage. • Clean/replace any damaged ceiling tiles. • Clean and dispose of any waste.
Communal Floor Covering Replacements	• Survey the block to measure and schedule all necessary materials such as door bars, or trims, etc. • Attend consultation meeting with residents. • Remove floor coverings and any adhesive or carpet backing left behind and dispose of waste. • Provide and install new sheet carpeting as per specification. • Touch up any damage to new paint. • Clean and dispose of any waste.
Communal Heating	• Survey the site to ensure compliance with specification, schedule materials to be ordered plan the installation. • Asbestos Survey and Removal. • Attend a planning consultation meeting with Scheme management staff to ensure deliverability. • Attend customer consultation meeting. • The plan to deliver must ensure that the scheme residents have a continuous supply of heating and hot water, this may require a temporary boiler to be connected whilst the existing units are removed and replaced.

	• In the boiler room remove the modular/primary boiler, hot water storage vessels, flues, pumps and any other ancillary components and pipework. • Provide and install new modular/primary heating appliances, hot water storage vessels, pumps, flues and all necessary pipework and valves, drain off points and testing points, etc. • Provide and position a schematic drawing of the equipment in the plant room including all valves, pumps, switches, etc. • In communal areas parts the distribution system shall be isolated and replaced in sections to ensure that whole building is not without heating. • When replacing the heating distribution system within a dwelling this should be removed and replaced immediately, temporary oil filled electric heaters to be left within flats (minimum of 2 – lounge and bedroom). • Thoroughly test and commission the system. • Provide and install heat metering equipment to all dwellings to allow individual service charging. • Provide a fire stopping schedule with evidence of completed works indexed to a plan of the building. • Clean work areas and remove all waste and dispose. • Register any guarantees or warranties on behalf of the client. • Provide all necessary handover documentation to the client.
Communal Lifts	• Survey the site to ensure design viability and compliance with specification, schedule materials to be ordered plan the installation. • Asbestos Survey and Removal. • Attend a planning consultation meeting with Scheme management staff to ensure deliverability. • Attend customer consultation meeting.

	• Install back up stair lift if one is not already present. This is to ensure that vertical transportation is maintained throughout. • Remove the lift car, lifting gear and control panels from the shaft and motor room and dispose. • Undertake any builders work required to alter the size of openings or the shaft. • Provide and install new lift car and lifting gear, control panels etc. • Provide and position a schematic drawing of the equipment in the motor room including all switches, etc. • Ensure smoke/heat detection is provided to the lift shaft and linked to communal alarm system. • Install a call point function which operates on an external phone line or integrates with the telecare system to alert Platform to any entrapments. • Thoroughly test and commission the system. • Make good to all finishes – wall decoration, flooring and ceilings. • Clean work areas and remove all waste and dispose. • Train staff on how to manually lower the lift car and open the doors in the event of an entrapment. • Register any guarantees or warranties on behalf of the client. • Provide a fire stopping schedule with evidence of completed works indexed to a plan of the building. • Provide all necessary handover and training documentation to the client.
Telecare Installation	• Survey the site to ensure design viability and compliance with specification, schedule materials to be ordered plan the installation. • Asbestos Survey and Removal.

	• Attend a planning consultation meeting with Scheme management staff to ensure deliverability. • Attend customer consultation meeting. • Remove all existing telecare equipment and door entry/access control equipment. • Install new telecare system and door entry/access control system. • Thoroughly test and commission the system. • Make good to all finishes – wall decoration, flooring and ceilings. • Clean work areas and remove all waste and dispose. • Train staff on how to reset the system and add new peripheral equipment. • Register any guarantees or warranties on behalf of the client. • Provide a fire stopping schedule with evidence of completed works indexed to a plan of the building. • Provide all necessary handover and training documentation to the
Door Entry System	• Survey the site to ensure design viability and compliance with specification, schedule materials to be ordered plan the installation. • Asbestos Survey and Removal. • Undertake customer consultation to advise of the work stages, dates, timescales and key contacts. • Remove all existing door entry/access control equipment. • Install new telecare system and door entry/access control system. • Provide all customers with 3 access fobs. • Thoroughly test and commission the system. • Make good to all finishes – wall decoration, flooring and ceilings.

	• Clean work areas and remove all waste and dispose. • Train staff on how to reset the system and add new peripheral equipment. • Register any guarantees or warranties on behalf of the client. • Provide a fire stopping schedule with evidence of completed works indexed to a plan of the building. • Provide all necessary handover and training documentation to the client.
Communal Doors	• Design Visit, measure and Pre Works Inspection. • Customer Consultation. • Asbestos Survey and Removal. • Remove the existing door and frame. • Provide or replace a lintel if required. • Install the new door and frame. Ease and adjust to ensure smooth operation. • Clean and remove all waste. • Explain, demonstrate and leave the maintenance and operating instructions with customer. • Register the guarantee for the door and frame on behalf of the client and provide with all necessary handover information.
Infrastructure	• Infrastructure works includes the following work types: - Resurfacing of hard landscaped surfaces - Soft landscaping areas. - Fencing. - Drainage. - Bin Stores and Mobility Scooter storage and charging - Demolition of ancillary redundant buildings (stores, garages, etc). • Infrastructure works will include the following stages:

	- Appointment of specialist consultants (architect, engineer, etc) - Initial survey, measure and design visit. - Obtain Statutory undertaker service drawings and submit any notices or obtain consent required under any wayleave or easement agreements. - Submit and obtain any Local Authority consents required (Planning, Building Control, Highways consent). - Asbestos Survey and Removal. - Consultation meeting with Scheme staff. - Consultation meeting with Customers for larger works. - Undertake and complete the above works on site - Make good to any damaged or disturbed decorations (walls, floors and ceilings). - Clean and remove all waste and debris - Quality check all works for compliance. - Register any guarantees or warranties on behalf of the customer. - Provide all completion documentation, evidence and certification to the client.
Refurbishment/Remodel	• The commission of design work (Principal Designer, Architects, Structural Engineers, M&E Engineers, Party Wall Surveys). • Customer consultation events. • Planning Permission approval, Building Control approval, Party Wall Notices. • Asbestos refurbishment and demolition surveys. • Asbestos removals where necessary. • Temporary works to maintain facilities if necessary (heating, hot water, fire alarms, etc). • Erection of scaffolding or other working at height safety systems as required. • Internal alterations, demolition or construction of new loadbearing and non-loadbearing walls. • Installation of new suspended ceiling structures. • Decoration to walls, ceilings and woodwork and any other previously painted surfaces in communal areas.

	• Removal of old and installation of new floor coverings (carpet or vinyl) to communal parts. • Replacement of Communal Components as required such as a kitchen, bathroom, lift, heating, wiring, etc. • Construction of new ancillary buildings of traditional, prefabricated or modular construction types to provide for bin storage or mobility scooter storage, etc. • Alteration to or installation of new boundary treatment, paving or car parking areas. • Alteration of or installation of new external security lighting. • Decoration of external timber products and any other previously painted surfaces. • Provision of all certificates, warranties and guarantees as part of the Building Safety file. • Training and information to support future maintenance.

Retrofit Component	**Specification**
External Wall Insulation (EWI)	External wall insulation to achieve a U-value of ≤0.18 W/m^{2}K using BBA-certified systems such as Webertherm Mineral Wool XM and Johnstones Stormshield EPS. Rooflines adjusted, sills widened, insulated reveals. Meters remain in original plane where possible. Sockets/switches brought forward. Windows/doors aligned within insulation zone. Window reveal adjustments only where property is receiving EWI/IWI.
Liability for Damage to EWI	Contractor fully liable for any drilling, fixing or damage Reinstatement must restore insulation, required within 5 working days airtightness, weatherproofing and render using manufacturer-approved methods.
Cavity Wall Insulation (CWI)	BBA-approved bead systems; pre/post cavity checks Mandatory borescope surveys

	Suitability assessment for narrow cavities.
CWI Extraction & Refill	**Scope:** Remove failed insulation and replace to PAS 2035/BBA. **Survey:** full borescope assessing cavity condition and moisture. **Extraction:** full vacuum extraction; waste to licensed facility. **Verification:** post-extraction borescope and evidence. **Refill:** BBA-approved water-repellent insulation.
Internal Wall Insulation (IWI)	U≤0.25, Vapour control layer and hygrothermal assessment, decorative finish. Insulate Window reveals. Appropriate planning for plugs and switches – bringing forward, not around. Approved system to be submitted.
Liability for Damage to IWI	Full reinstatement required including VCL and airtightness integrity using manufacturer-approved repair.
Windows	U≤0.8 W/m^{2}K. Frames sized for EWI/IWI (70–90mm); widened sills or in line with the insulation as appropriate. Insulated reveals required. Frames positioned within insulation zone where possible. Airtight installation. Trickle vents need to be included in line with ventilation plan (DMEVs do not need trickle vents but other fans do).
Doors	U≤0.8 W/m^{2}K. Reveals integrated with EWI/IWI. Airtight insulation.
Loft Insulation	300mm mineral wool total depth. U ≤ 0.16 W/m^{2}K. Insulated/draughtproofed hatch big enough for servicing requirements. Roof void ventilation (ridge, tile or soffit vents) must be assessed and upgraded as required.

	Cold Roof (Cold Loft / Storage Loft)- Insulation is installed at joist level, leaving the loft space unheated. Specification: - 100mm between joists - 200mm cross-laid over joists - Target performance: Meets 0.16 W/m^{2}K (Part L aligned) Maintain roof ventilation. If boarding, avoid compressing insulation - use raised loft boarding systems. Insulate and draught-proof the loft hatch. Warm Roof (Loft Conversion / Habitable Space) Insulation is installed at rafter level, keeping the loft warm. Materials: PIR rigid boards (e.g., Kingspan, Celotex) Typical thickness: 120–150mm PIR (Part L aligned) Install PIR between rafters, maintaining a 50mm ventilation gap. Add an under-rafter insulated plasterboard layer (e.g., 62.5mm) to reduce thermal bridging. Include a vapour control layer (VCL). Tape all joints. If any property has bother that 1 should be removed (preferably rafter) and the other should be topped up to 300.
Room in Roof insulation	Required U-value; airtightness and insulation continuity with EWI.
Flat Roof Insulation	Flat roof insulation achieving required U-value. Moisture risk analysis; correct interface with EWI.
Airtightness	Whole-dwelling airtightness; sealing of services Blower door testing or Pulse Testing condition dependent Supports low-temperature heating. Airtightness testing.
Ventilation	Continuous running fans (wired-on). Lo-Carbon dMEV with Part F commissioning. MVHR as required archetype-specific ventilation strategy.

	Where possible, ventilation ducts should terminate through an external wall rather than into the loft space to reduce the risk of warm, moist air condensing inside the duct and dripping back into the room. If wall termination isn't possible and the duct must run through the loft: - Keep the duct as short as possible. - Install a condensate loop (a small dip in the duct run) to prevent condensation running back down into the fan or room. - Ensure the loft duct route is properly supported and insulated where required.
ASHP	45°C flow design; room-by-room heat loss; weather compensation on If design is over 7Kw to review with PHG. Pumps should be in an accessible location for maintenance/repairs. HWC location - ideally not in the lofts or unheated outhouses. MCS commissioning compatibility checks.
HHRSH	Dimplex Quantums as standard across the property. Every habitable room must have an HHRSH sized to meet the full heat demand. Where a room currently contains secondary heating (e.g., panel heaters, plug-ins, open fires), these must be removed and replaced with an appropriately sized HHRSH so that it fully provides the required heat output.
Solar PV Panels	Bird netting provided as standard on all PV installations. Systems must be MCS-approved and fully compatible with ASHP, EV chargers and batteries. External inverter preferred for ease of maintenance and reduced internal heat load. **Minimum size** - System shall meet the minimum viable generation potential based on roof area and shading analysis.

	Maximum size - System shall be the maximum capacity that can reasonably fit on the available roof surfaces while maintaining compliance with MCS shading, spacing and structural rules. **Preferred approach** - Install the optimal mid-range system balancing generation yield, inverter efficiency curves, and customer benefit (i.e., not undersized, not oversized). System design.
Inverters & Batteries	Smart-grid ready. IP65 external. Compatible with PV/ASHP/EV.
Hot Water Storage	Mains-fed. Compatible with heat pumps. Units should be placed in an accessible location for maintenance and repair. Ideally not in lofts or unheated outhouses. Mixergy and SunAmp acceptable.
Programme & Standards	PAS 2035/2030 compliance. Fabric-first. Whole-house design. Strong resident care and communication.
Contractor Responsibilities	Protect all insulation. No unapproved penetrations. Maintain site safety and communication. No materials stored against insulated walls.
Quality Assurance and Defect Rectification	Evidence of insulation integrity. thermal continuity checks; defects rectified via manufacturer method before EPC/MCS sign-off.
Commissioning and Handover	Room-by-room documentation. Ventilation commissioning. Heat pump MCS sign-off. Electrical certification. Resident training and customer friendly user manual.

	Warranties and guarantees provided. In no circumstance should the MCS certificate for PV be provided to the resident.
Decorative Order	All works must be neatly boxed-in, sealed and finished. Reinstatement of plaster, skirtings, reveals and finishes. Property left in good decorative condition.
Programme & Standards	PAS 2035/PAS 2030 compliance; whole-house approach; Retrofit Coordinator sign-off; resident care.
Contractor Responsibilities	Protect insulation; no unapproved penetrations; site safety; communication; no storage against insulation.
Quality Assurance	Thermal continuity checks; random borescope inspections; defects rectified before EPC/MCS sign-off.

Secondary Measures	TRVs on ≥50% radiators Low Energy Lighting at void Remove secondary heating where feasible.