



Working in Partnership

Energy Company Obligation: Help to Heat
Joint Local Authority Flexible Eligibility Statement of Intent
Guidance Note for Referring Organisations

Local Authority Names: Bournemouth Borough Council and Borough of Poole

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<http://www.bournemouth.gov.uk/greeneconomyleader> and <https://www.poole.gov.uk/>

Status: Bournemouth Borough Council is acting on behalf of Borough of Poole in relation to Help to Heat Flexible Eligibility.

Background

This Guidance Note is to be read in conjunction with the Bournemouth and Poole Joint Local Authority Flexible Eligibility Statement of Intent (Sol) published on the above websites. It provides instructions for installers of ECO-funded measures who wish to use the Sol to obtain a Declaration of eligibility to install a measure in a property they have identified as suitable and requiring it, with a client proven to be eligible. See the current Sol for full eligibility criteria, which is liable to occasional revision at the instruction of UK Government.

Please take careful note of these instructions. The process has been designed with protection of the customer foremost. Bournemouth and Poole Councils reserve the right to refuse to issue a Declaration or to not issue a Declaration to the requesting organisation if it is discovered that any of the conditions stated in the Sol or this guidance note have been contravened in any way. The Councils' decision is final.

Bournemouth and Poole Councils use LEAP (the Local Energy Advice Programme) to verify ECO-Flex eligibility. Use of this service ensures that the household gains the maximum benefit from the interaction (energy advice, simple energy efficiency measures, income maximisation support), which we are keen for residents to receive. The visit also verifies the property suitability and requirement for a potential (i.e. not previously installed) ECO-funded measure such as cavity wall insulation or heating system replacement.

The Referral Process

When an eligible household has been identified, they can be quickly entered on the LEAP portal to receive a visit. This can be found at: <https://www.applyforleap.org.uk/> Whilst entering client information, the referring organisation can make a Declaration request and enter their own contact details in the box titled 'Referrer's Comments'. A suggested format is: *'This client is referred to LEAP so that an ECO-Flex Declaration can be issued. The potential ECO measure(s) we believe are required are XXXX. Please issue the Declaration to: Contact name/ Company Name/ Company address/ Phone number/ Email'*. Once issued, the declaration will be emailed to the referrer at the address supplied.

Please note the following conditions:

1. The client **must not** have been identified using any 'cold-calling' methods
2. The client **must have indicated** why they are eligible, so this question can be completed on the portal
3. The client **must have given permission** to be referred into the LEAP scheme, understand what it entails and the following data sharing permission **must have been read to them** and confirmed as 'True' by the referrer:
"I consent to you sharing my contact information with AgilityEco who are running the LEAP programme with the support of the council / housing association. I understand that a member of staff at AgilityEco will telephone me to ask me further questions to confirm my eligibility for the scheme and arrange a home energy visit. I understand that this may include questions regarding my health and financial status and/or that of members of my household. I understand that my personal information will not be shared with or used by anyone outside this programme without my explicit consent unless the law allows for the sharing of information for the purposes of prevention and detection of crime or where I or another person would otherwise be at risk of serious harm."
4. The referring organisation's details **must be entered correctly** at the time of referral.
5. **No works are to be commenced** until a Declaration is received by the referrer.
6. **No claims are to be made**, verbally or in print, that a referring organisation is 'working in partnership', 'on behalf of' (or any similar terms) with Bournemouth and Poole Councils, LEAP, or any of the organisations involved in its delivery. Use of logos/brands of the aforementioned is not permitted on promotional material, printed electronic or otherwise.

If any of the above conditions are suspected/shown to have been contravened, the Councils reserve the right to refuse to issue a Declaration or to not issue a Declaration to the requesting organisation. Furthermore, no future Declaration requests will be considered from that referring organisation.

Bournemouth and Poole Councils, LEAP and the organisations involved in its delivery accept no liability for the failure to issue a Declaration for any reason. It is the responsibility of referring organisations to ensure Declarations are received by them before commencing any works, or to find out the reason for non-issue by contacting the Responsible Officer, as detailed in the Sol.