



**TRUSTMARK**  
Government Endorsed Quality



# Green Homes Grant Voucher Scheme Requirements for TrustMark Scheme Providers

V1.3 (5<sup>th</sup> November 2021)

This document must be read and used in  
conjunction with the current version of the  
TrustMark Framework Operating  
Requirements and BEIS Terms and Conditions

[trustmark.org.uk](https://trustmark.org.uk)

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# 02

## Foreword

### Green Homes Grant Voucher Scheme (GHGVS)

These arrangements apply for the duration of the GHGVS and may be amended from time to time.

Since inception in 2005 TrustMark has been instrumental, along with our Scheme Providers, in enhancing levels of consumer protection in a range of industry sectors.

The GHGVS<sup>1</sup> is a government grant scheme for property owners and landlords in England to help pay for energy-efficient measures in their home.

In July 2020, the Chancellor announced a £2 billion Green Homes Grant Scheme in England to help homeowners and landlords improve over 600,000 homes to be more energy-efficient across England. This scheme was planned to run from the end of September 2020 through to March 2022, however applications to the Scheme closed on 31 March 2021.

The home energy-saving improvements carried out under the government's GHGVS must be completed by a TrustMark Registered Business and for low carbon technologies, must also be registered with the Microgeneration Certification Scheme.

The GHGVS requires the businesses carrying out the work to record information about the installation into TrustMark's Data Warehouse, that acts as a repository of information about the work undertaken on the property and associated financial protection mechanisms.

Version V1.2 was updated to reflect that:

- BEIS has requested that BSI republish the PAS 2030:2019 standard to allow the PAS 2030:2017 standard to continue to be used until the 31 October 2021. All works completed under the PAS 2030:2017 standard within **the Green Homes Grant Voucher Scheme and Green Homes Grant Local Delivery Scheme must be completed and lodged within TrustMark Data Warehouse no later than 31 October 2021 (for GHGLAD phase 1a 30 September 2021 applies).**
- **The decision to extend the PAS2030:2017 standard beyond 30 June 2021, only applies to the Green Homes Grant Voucher Scheme and Local Authority Delivery Phase 1. All other schemes will not accept PAS 2030:2017 from 1 July 2021.**

This version V1.3 includes a new clause (6.3.8) as an update giving information required because of PAS 2030:2017 ending on 31 October 2021.

<sup>1</sup> Further information, and the latest updates on the scheme can be found at <https://www.gov.uk/guidance/apply-for-the-green-homes-grant-scheme>

# 03

## The Framework Operating Requirements

### 3.1 The Framework Operating Requirements:

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**3.1.1 The Green Homes Grant Voucher Scheme Requirements for TrustMark Scheme Providers must be read and used in conjunction with the current version of the Framework Operating Requirements (FOR) and any requirements set by BEIS and the Scheme Administrator.**

**The following sections from the FOR, with their principles and Scheme Provider responsibilities, will remain uniform in the delivery of the GHGVS:**

- 04. Scheme Provider Application & Registration
  - 05. Standards & Competency
  - 06. Audit & Compliance
  - 07. Enforcement & Sanctions
  - 08. Dispute Management
  - 09. Consumer Safeguarding
  - 10. Financial Protection
  - 11. Brand Governance
  - 12. Communications
  - 13. Assessment & Design
  - 14. Monitoring & Evaluation
  - 15. Product Suitability
  - 16. Data & Information Sharing
  - Annex A – Applicant & Registered Business Requirements
  - Annex B – Energy Efficiency
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## 04

## Registered Business Eligibility

**The addition of the Green Homes Grant Voucher Scheme Requirements for TrustMark Scheme Providers will be in place for the duration of the GHGVS as determined by BEIS scheme rules. All installations carried out under the GHGVS must comply with all conditions of the current version of the overarching TrustMark Framework Operating Requirements.**

#### 4.1 Registered Business Eligibility:

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- 4.1.1 Businesses who have either PAS 2030:2017, PAS 2030:2019 and/or appropriate MCS certification can work within the GHGVS.
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- 4.1.2 Any Registered Business, who are either still certificated to PAS 2030:2017 or have not yet completed the full transition to PAS 2030:2019, are eligible to work within the GHGVS.
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- 4.1.3 Businesses undertaking work for the GHGVS must be compliant with the TrustMark Code of Conduct and Customer Charter.
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- 4.1.4 Financial protection must be provided for all works installed under the GHGVS. The financial protection mechanism<sup>2</sup> must meet the TrustMark FOR - Section 10 and be at least the equivalent of that specified for measures installed under the Energy Company Obligation (ECO) scheme; and be declared within the Data Warehouse.
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- 4.1.5 If an installer has already transitioned from PAS 2030:2017 to PAS 2030:2019/PAS 2035:2019 and has access to a Retrofit Coordinator, they will have the option of completing all GHGVS work in compliance with the requirements of PAS 2035:2019 if they wish to and are encouraged to do so.
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- 4.1.6 Installations deemed to be significant technical risk as defined in 6.2.2 **must** be installed under PAS2035:2019 and PAS 2030:2019 ensuring that a Retrofit Coordinator is used throughout the duration of the project.
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- 4.1.7 Businesses will be required to hold both TrustMark and MCS registration for the installation of low carbon and clean heat technology measures.
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- 4.1.8 Businesses will have to register with the GHGVS administrator and comply with the GHGVS Terms and Conditions.
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#### 4.2 Scheme Provider Requirements:

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- 4.2.1 To ensure that all data submitted for Registered Businesses is accurate including, but not limited to, PAS certification, registered trade scope and business details.
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- 4.2.2 To ensure that Registered Businesses working within the GHGVS are aware of the necessity of lodgement into the TrustMark Data Warehouse.
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- 4.2.3 Scheme Providers who are not UKAS accredited Certification Bodies but wish to offer TrustMark registration for PAS / MCS trades, must have an evidenced formal arrangement with a Certification Body(ies) in order that PAS / MCS scopes, assessments and certification can be validated and kept synchronised with the Certification Body.
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<sup>2</sup> <https://www.trustmark.org.uk/ourservices/financial-protection>

# 05

## UKAS Certification Requirements

*Text as published by UKAS 25 June 2021<sup>3</sup>*

UKAS PAS 2030 GREEN HOMES COMMUNICATION TO CERTIFICATION BODIES – EXTENSION OF PAS 2030: 2017 EXPIRY UNTIL 31 OCTOBER 2021 FOR THE GREEN HOMES GRANT VOUCHER SCHEME AND LOCAL AUTHORITY DELIVERY PHASE 1

**This Communication relates ONLY to the Green Homes Grant Voucher Scheme (GHGVS) and Local Authority Delivery (LAD) Phase 1. It does NOT relate to any other scheme e.g. LAD Phase 2, Energy Company Obligation (ECO), Social Housing Decarbonisation Fund (SHDF) and Home Upgrade Grant (HUG).**

Following the publication of the revised PAS 2030: 2019 in May 2019 BEIS initiated a transition period to ensure that all UKAS-accredited certification bodies had transitioned to the new version of PAS 2030 by 30 June 2020 and their certified installers had transitioned by 30 June 2021. **The expiry date for PAS 2030: 2017 and hence the transition deadline for installers has now been extended until 31 October 2021 for the GHGVS and LAD Phase 1 ONLY.**

In 2020, BEIS, TrustMark and UKAS jointly issued information on the transitional arrangements allowing installations under either the 2017 or 2019 versions of PAS 2030 for a limited period for installers delivering under the GHGVS.

In order to facilitate implementation of the GHGVS and LAD Phase 1, BEIS has made further changes to the transitional policy as follows:

1. PAS 2030 certified installers that have transitioned from PAS 2030:2017 certification to PAS 2030:2019 certification can have their 'superseded' PAS 2030:2017 certification recognised alongside their PAS 2030:2019 certification; thus, for GHGVS and LAD P1 only, they are permitted to work in compliance with either standard of their certification and scope until 31 October 2021.

**Note: Where an installer has no relationship with the Certification Body that issued the PAS 2030:2017 certification (e.g. they have moved Certification Body to obtain PAS 2030:2019 certification) recognition of PAS 2030:2017 certification may not be possible; this will be dependent on the services offered by the PAS 2030: 2017 Certification Body.**

2. All work **COMPLETED** after 31 October 2021 by a PAS 2030 certified installer must be in compliance with their PAS 2030:2019 certification and carried out in accordance with PAS 2035:2019.

Any PAS 2030:2017 certificate that has been issued under this arrangement must be transitioned by the 31 October 2021 or the certificate will lapse.

All other applicable rules and requirements apply including but not necessarily limited to those defined by BEIS, UKAS, Ofgem and TrustMark.

Please note:

<sup>3</sup> <https://www.ukas.com/resources/latest-news/extension-of-pas-20302017-expiry-for-green-homes-grant-voucher-scheme/>

a) Certification to PAS 2030:2019 requires compliance with all the requirements of that standard.

b) All UKAS- accredited PAS 2030 certification bodies have had their accreditation schedules updated to PAS 2030:2019 as required by the BEIS transitional requirements. The BEIS 'flexibility arrangements' for the interim period for the GHGVS and LAD Phase 1, mean that this accreditation will be recognised as also allowing certification to the 2017 version of PAS 2030 for the limited period until 31 October 2021.

c) Installers will only be able to install measures for which they hold certification and for which their certification body holds accreditation.

d) For delivery under GHG LAD Phase 2, SHDF, ECO and HUG installers must be certified to PAS 2030:2019 and compliant with PAS 2035:2019.

# 06

## Eligible Measures & Installation Standards

### 6.1 Eligible Measures:

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6.1.1 The following are eligible primary measures at time of publication:

- Solid Wall Insulation
- Under Floor Insulation
- Cavity Wall Insulation
- Loft Insulation
- Flat Roof Insulation
- Room in Roof Insulation
- Park Home Insulation
  
- Air or Ground Source Heat Pump
- Solar Thermal (liquid filled flat plate or evacuated tube collectors)
- Biomass Boilers

*Low carbon technologies must be installed by a TrustMark Registered Business, holding the relevant MCS Certification and in accordance with the relevant MCS standard.*

The following are eligible secondary measures which can be installed in properties where at least ONE primary measure has been installed as part of the voucher scheme:

- Draught Proofing
- Double/Triple Glazing (where replacing single glazed windows)
- Secondary Glazing (in addition to single glazing)
- External Energy Efficient Doors (replacing single glazed or solid doors installed before 2002)
- Heating Controls
- Hot Water Tank Thermostats and Insulation

**Check with GHGVS Administrator for detail of the latest eligible measures.**

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6.1.2 All measures within the GHGVS must meet the minimum ventilation requirements of PAS 2030:2017 section A5 and tables A4/5/6. Ventilation requirements must be satisfied and evidenced in full for the installation to be PAS compliant.

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It is recognised under PAS 2030:2017 ventilation requirements are recommendations, yet under the TrustMark GHGVS requirements, these are mandatory requirements.

In all cases where the installation of a insulation measure is undertaken, the property must have ventilation requirements completed in line with either PAS 2030:2017 or as per the requirements of PAS 2035:2019 and PAS 2030:2019 depending upon the installation methodology used.

## 6.2 Installation Standards:

- 6.2.1 All measures must be installed in line with the requirements of PAS 2030:2017 or the MCS appropriate standards. Where the property type is specified in 6.2.2, then PAS 2035:2019 and PAS 2030:2019 must be followed.
- 6.2.2 All measures installed in park homes, high-rise buildings and buildings that are both traditionally constructed and protected must be delivered by a PAS 2030:2019 certificated installer in compliance with PAS 2030:2019 and PAS 2035:2019. The definition of high-rise buildings, protected buildings and traditional construction is as defined in PAS2035:2019.

The significant technical risks associated with park homes, high-rise buildings, and any protected buildings will render them unsuitable for the delivery under PAS 2030:2017; therefore, the PAS 2035:2019 route must be adopted - this will ensure a TrustMark Retrofit Coordinator is used for the duration of the installation.

Please view the table below to understand these risks and how they will affect each property:

Scenario	Technical risk	Risk reduction
Scenarios requiring PAS 2035:2019 and a Retrofit Coordinator		
Park Homes	Due to the nature of the construction Park Homes can be more effectively treated under PAS 2035:2019 on the basis the construction type and applicable measures.	Park homes, by the nature of their construction, can suffer from serious interstitial condensation. The consequence can be mould and mildew growth leading to poor indoor air quality and health issues for occupants. By their very nature Park homes are hard to treat effectively and would exponentially benefit from the whole house fabric first approach, the whole dwelling receiving the most up to date and effective treatment from professionals.  Installation requirements are PAS 2035:2019 & PAS 2030:2019 B.13 Measure BFM.13: Insulation of existing park homes
A building that is <b>both</b> traditionally constructed <b>and</b> protected.	The level of competence and qualification that is required to assess and determine the correct technical measures that are appropriate for the building.	Traditional, not protected can be treated through PAS 2030:2017.  Traditional <b>and</b> Protected <b>must</b> be treated through PAS 2035:2019 & PAS 2030:2019
High Rise buildings	Possible challenge where multiple occupiers seek grants for a structure that then falls into the high- rise category.	Any risks associated with these structures must be removed from the process and managed through the recognised planning requirements alongside the application of the high-risk review process.  Must comply to PAS 2035:2019 & PAS 2030:2019



6.2.3 Refer to the table below for measures that have additional requirements:

Scenario	Technical risk	Risk reduction
Measures requiring other intervention		
Internal Wall Insulation	Technical risks where installed services create an obstacle within the structure	Partial internal wall insulation treatment of properties can be fraught with issues. The temperature differential between rooms or areas can create the ideal conditions for condensation. Thermal bridges become extremely difficult to eliminate, giving further grounds for concern.  The best solution is always treating the whole or 100% of the external envelope of the building. Should this not be feasible then a medium term retrofit plan through the PAS 2035 route should always be the best solution.
Solid Wall Insulation	Technical delivery risks may be presented and create additional challenges that would require further considerations.	Where a (pre-design) building survey or assessment identifies issues regarding conditions or installation challenges, these situations must be addressed prior to installation.
Low carbon heating	The design of the heating system is critical to the successful installation of a low carbon heating source.	System design which considers the house fabric must be completed and recorded in accordance with the relevant MCS standards requirements before the installation of low carbon heating measures (s).

*Note: Whilst the GHGVS 'Scheme Rules' can allow partial treatment of a dwelling, installers must be aware of the requirements of the Building Regulations and the PAS standards and carry out work that is compliant with them. If additional technical support is required to understand what is needed to meet those requirements, particularly related to measures of significant technical risk, installers should seek support from their Certification Body.*

6.2.4 TrustMark reserves the right to undertake an audit on any measures that have been completed under the GHGVS.

6.2.5 Audits will be performed and TrustMark will make Scheme Providers aware of audit non-conformity for follow up and resolution.

6.2.6 Where non-conformity is identified that may have an impact on compliance with the BEIS/Administrator GHGVS Scheme Rules TrustMark will notify the GHGVS Administrator.

### 6.3 Voucher Extensions

6.3.1 Under the Terms and Conditions of the Scheme, vouchers that are already issued may be allowed to be extended. The customer must apply to the scheme administrator<sup>4</sup> for extensions on each voucher they wish to extend prior to the expiry date on that voucher.

<sup>4</sup><https://green-homes-grant.service.gov.uk/contact>

- 6.3.2 If the customer requests a voucher extension any date up to and including 31 July 2021, vouchers will be extended for 90 days, or until 31 October 2021, whichever is soonest.
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- 6.3.3 Extension requests received after 31 July 2021 may be granted in more limited circumstances. For the majority of vouchers, extension requests may be granted only if work has started on the voucher measure. Vouchers that are extended will expire on 31 October 2021.
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- 6.3.4 It is recognised that occasionally, once work has started, circumstances may arise that are fully beyond the customer's or installer's control. In such a situation, the customer can contact the scheme administrator to assess if a short extension until 30 November 2021 at the latest could be considered. This is subject to circumstances and work can only be carried out after 31 October 2021 by a Registered Business that holds PAS 2030:2019 certification (also see Section 5).
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- 6.3.5 If the customer was issued a voucher for one or more of the following measures, after 30 April 2021, they may still be granted an extension for the voucher after 31 July 2021, even if work has not started. Vouchers will be extended for 90 days or to 30 November 2021, whichever is sooner. The measures are:
- Solid wall insulation (internal or external)
  - Park home insulation
  - Air source heat pump
  - Ground source heat pump
  - Hybrid heat pump
  - Biomass boiler
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6.3.6 If the customer has a voucher for a primary measure that expires after 31 July 2021 and it has not yet been redeemed, they can apply for an extension to any secondary measure voucher they have, even if work has not started. Vouchers will be extended to 31 October 2021 or the expiry date of the primary voucher, whichever is later.

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6.3.7 Please note that extensions for secondary measures are not automatically granted. The customer will need to apply for extensions on each voucher that they wish to extend.

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6.3.8 **This update applies to the Green Homes Grant Vouchers Scheme only where the voucher has not expired.**

For work undertaken under PAS2030:2017 or the PAS2030:2017 UKAS easement, as well as completing the work and handing over to the customer, all the relevant redemption steps required to redeem a voucher, must be completed before the voucher's expiry date. If a Registered Business is not clear what the redemption steps are, or how they relate to their specific circumstances, they should look at the updates provided by the Green Homes Grant Team or speak to them directly.

#### **PAS 2030:2017**

Where work has been started before 31 October 2021, including being marked as started via the ICF Sightline App, but not completed and the PAS2030:2017 certification has ended, the business can complete the work in compliance with the requirements of PAS 2030:2017 under the TrustMark rules.

All lodgements will need processing with a handover/install date of 31 October 2021 and the reason code: GHGVS Install DD/MM/YYYY (true date) Handover DD/MM/YYYY (true date) to reflect the PAS2030:2017 Claim of Compliance and Finance Protection/Guarantee.  
e.g.: GHGVS Install 05/11/2021 Handover 09/11/2021

#### **PAS 2030:2019**

For PAS 2030:2019 certified TrustMark Registered Businesses, lodgement will not be required to be made by a TrustMark registered Retrofit Coordinator unless the property is of a type referenced in Clause 6.2.2 Section 6 – Eligible Measures and Installation Standards.

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All work and vouchers under these arrangements must be redeemed and lodged into the TrustMark Data Warehouse before 1st December 2021 by the installer.

TrustMark will conduct Quality Assurance audits on all works completed under these arrangements, the outcomes of which will feed into the voucher processing and payment processes.

These arrangements are as agreed by BEIS for the purposes of the Green Homes Grant Voucher Scheme only.

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# 07

## Data Warehouse Lodgement

### 7.1 Lodgement of Measures:

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- 7.1.1 All installations under PAS 2030:2017 for GHGVS will require lodgement within the TrustMark Data Warehouse by the responsible business
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- 7.1.2 Work delivered to PAS 2035:2019 must be lodged by a TrustMark registered Retrofit Coordinator
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- 7.1.3 The GHGVS lodgement fee will be £30.00 + VAT
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- 7.1.4 GHGVS measures must only be installed by businesses registered with the GHGVS administrator whether lodged by the installing business or Retrofit Coordinator.
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### 7.2 Lodgement evidence in the Data Warehouse

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- 7.2.1 The following evidence will be required for lodgement of GHGVS measures (Excluding PAS2035:2019 which will follow the existing process):
1. Guarantee / Financial Protection Mechanism
  2. GHGVS Voucher Number
  3. MCS Certificate Number For MCS technologies, this is mandatory
  4. Building Survey (Pre-Design) Clause 3.1 / Annex B relevant tables
  5. EEM Design (Retrofit Design) Clause 3.7 / Clause 4
  6. Pre-installation Building Inspection Clause 3.16 / Clause 6 / Annex B relevant tables
  7. Mid-install inspection Clause 5.1.4 / Clause 6.3  
Note - Where required, intermediate inspections shall be supplied as part of a compliant lodgement
  8. Handover Documents Clause 5.8 / Annex B relevant tables
  9. PAS 2030 Declaration of Conformity Clause 8

The above clause references relate to PAS 2030:2017 and have been provided as guidance only; installers are required to satisfy themselves that the evidence provided meets these requirements or seek further clarification from their Certification Body.

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- 7.2.2 Initially lodgement will be made directly into the Data Warehouse; the short timescales may mean that an API may not be practical, and Scheme Providers must make provisions for monitoring registered businesses.
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- 7.2.3 Where the installation requires notification of Building Regulations, a self-declaration statement will be required before submitting a lodgement.
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