

Sustainability Roundtable – Key Takeaway Points

Time frames (Wave 2.1 funding and EPC C)

- [SHDF Wave 2.1 bid competition open](#) on: **29 September 2022**
- Wave 2.1 application submission details to be published: **October 2022**
- Wave 2.1 competition closes on: **18 November 2022**
- Government intends all homes must reach EPC C by 2035 where practical, cost-effective and affordable (fuel poor homes must reach this by 2030).

Importance of planning ahead

- Projects which have consistency reduce difficulties. Align retrofit plans to a long-term strategy.
- Reduce the frequency of site visits by considering future works which could be done alongside retrofit works (i.e. building safety works and retrofitting).
- Engage with supply chains early, ascertain capacity levels to deliver specific requirements.
- Demonstrate understanding of a historic building through the Heritage Impact Assessment.

PAS2035 compliance

- Recognise PAS2035 as not just mandatory, but as a guide to a successful retrofit.
- Make use of the benefits PAS2035 offers, such as upskilling employees and residents.
- The sector has gaps in knowledge. Funding is available to include residents on the retrofit journey.

Funding

- Make sure the co-funding requirement is met. BEIS require at least 50% of the total eligible costs to be provided by the Applicant when applying for the grant, non-eligible costs should not be included.
- Maximise funding to support a planned strategy (SHDF 2.1 / Co-funding / Private funding).
- If additional scale cannot be delivered, defending existing proposed SHDF projects is critical. The prospects of future funding programmes depend on the successful delivery of SHDF.
- Make strategy-led decisions rather than funding-based decisions.
- Take a pragmatic approach to reviewing the grant fund application. It is anticipated most homes will not require the level of spend allowed by the maximum cost caps. Funding applied for should be dependent on the cost of improving the stock to SHDF performance outcomes.
- Applicants can use other private funding or alternative funding with private lenders with loans based on social and governance directives i.e., Nottingham Community Housing Association loan incentivisation and compliance for BAME in management representation.

Resident engagement

- When engaging with residents for a planned retrofit, it is important to think holistically. A retrofit should tackle the social issues residents could face during periods of planned works.
- Electronic and telephone communication is not sufficient engagement with residents.
- Direct communication with residents through physical interactions could reduce negativity towards retrofit works.
- Careful and considered choice of language when approaching residents could have beneficial impacts on opinions for upcoming retrofit works. Move away from phrases such as “carbon neutrality” and place emphasis on “costs and comfort”. Also, “homes, not assets”.
- Teaching client-facing staff to be carbon-literate could help “de-mystify” technological jargon.

Digital platforms

- Data will be a key part of forming a digital platform for retrofit works. For example, integrating EPC information more accurately and efficiently, enables easier collaboration between co-ordinators.
- Smart technology provides an opportunity to create a commonplace to share data across retrofits, past and present. Data, therefore, will be readily available for access and monitoring.
- Utilise smart technology such as asset tagging, sensors and building modelling. BIM models can create more efficient plans, highlighting potential issues earlier before a retrofit co-ordinator would be required.
- Aside from traditional funding applications (as above) innovation support is available to assist in digitalisation of retrofit projects. This could inject grant funding of up to 2% of capital spend per bid.