

Moving Towards Devolved Retrofit











Introduction to Lovell

LOVELL





Morgan Lovell

BakerHicks.

Our SHDF Experience



Partner that you can trust

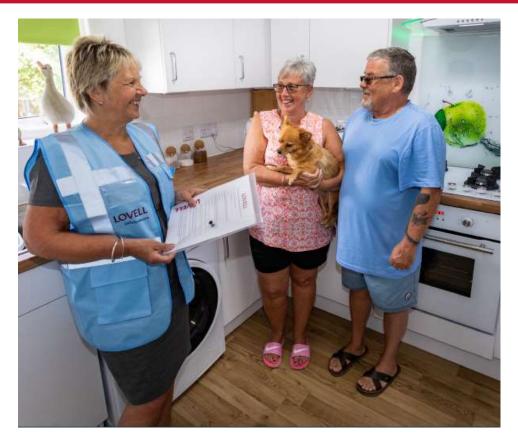
- Lots of properties
- Lots of measures
- Non-trad & traditional buildings
- We are experts
- People centred delivery
- Planned + (BAU)
- Focus on compliance



Unique Approach to Resident Engagement

The refurbishment process







Successful projects require



Challenge	Solution
Uninformed Client	Early engagement
Poor stock data	Technical validation surveys
Procurement	Work with a collaborative partner
Budget	Early engagement
Projects not ready	Early engagement
Unrealistic programme	Early engagement
Disruption	TPAS People focussed approach
Supply chain capacity	Visible pipeline
Compliance	Experience inhouse expertise
Social Value outcomes	Employ a collaborative partner





Retrofit Service

Stock Analysis	Funding Support	PAS 2035 Services	Energy and BIM Modelling	Delivery
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Compliance	Customer Experience	Asset Management Strategies	Reporting and Evaluation	Accredited Supply Chain
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Come and talk to us





Thank you for listening

Any Questions???

For more information, please contact:

Carl Yale Regional Refubishment Director Carl.Yale@Lovell.co.uk





ANTHONY DALY OPERATIONS DIRECTOR

Powering a Sustainable Future Together

Unlocking Supply Chain Opportunities & Partnering with West Midland Combined Authority



Meet the Directors



Michael Madigan Managing Director



Anthony Daly Operations Director

Lee McNally Managing Director

Current Contracts & Values

Project	Total Measures	Total Property Nos.	Dates	Value
	Home	Upgrade Grant (H	iUG)	
Liverpool City Region Combined Authority – HUG 1	150	105	November 22 - August 23	£1.5m
Liverpool City Council – HUG 1	150	108	March 23- September 23	
Worcester City Council – HUG 1	106	55	March 23- September 23	£550k
Cheshire East Council - HUG2	535	142	Nov 23 - ongoing	£1.35m
Manchester City Council – HUG2	96	26	Nov 23 - ongoing	£3m (projected final)
Northumberland County Council- HUG2	336	107	Nov 23 - ongoing	£2.2m
West Midlands Combined Authority – HUG2	261 (to date)	102 (to date)	Feb 24 - ongoing	£3.5m

Project	Total Measures	Total Property Nos.	Dates	Value
S	ocial Housing	Decarbonisation	Fund (SHD)	9
Livv Housing – SHDF 1	1,357	629	Sept 22 - June 23	£5.3m
Plus Dane – SHDF 2.1	2,389	601	Dec 23 - ongoing	£10m (projected final value)
Sandwell MBC – SHDF 2.1	1,863	541	Apr 24 – ongoing	£12m
Torus - Walton SHDF 2.1	1,112	134	Jun 24 - ongoing	£5.8m
Balsall Heath Housing	138	23	Sept 24 – ongoing	£580k
Cooperative SHDF 2.1				
Johnnie Johnson Housing Trust SHDF 2.1	72	18	Sept 24 - ongoing	£550k
Community Housing SHDF 2.1	114	10	Oct 24 - ongoing	£300k



Project	Total Measures	Total Property Nos.	Dates	Value
	Energy C	ompany Obligatio	n (ECO)	
OVO Energy/British Gas/Octopus Energy/EDF – ECO4 & Flex	10,000 (to date)	3,200 (to date)	Oct 22- ongoing	£80m (to date)
Weaver Vale Housing Trust - ECO	73	27	Oct 24 - ongoing	£306k

TOTAL CONTRACT VALUES: £48.3M

TOTAL PROPERTIES DELIVERED: 2,601

TOTAL MEASURES INSTALLED: 7,961



Plans for Growth in the West Midlands

- WMCA Home Upgrade Grant (HUG)
- Sandwell Social Housing Decarbonisation Fund (SHDF)
- Community Housing SHDF
- Balsall Heath
- Birmingham ECO



Impacting in:

Boosting Local Economy 💷 🕄



Warmer Homes



Lower Bills (£)

Reduced Carbon Footprint



Powering a Sustainable Future Together

Unlocking Supply Chain Opportunities & Partnering with West Midland Combined Authority



Meet the Sandwell Team



Matt Blackburn Head of Operations



Cheraine Bryant Operations Manager



Matt Russon Project Manager



Social Value & Local Recruitment

More Than Just Retrofit Our Commitment to Communities

- Job Creation in the West Midlands
- Supporting Local
 Subcontractors
- Tackling Fuel Poverty

- Improving Green Skills & Apprenticeships
- Community Support & Charitable Contributions





West Midlands Energy Capital's Spring Event:

Domestic Retrofit Energy Efficiency / Decarbonisation

Gary Lawson – Managing Director

11 March 2025



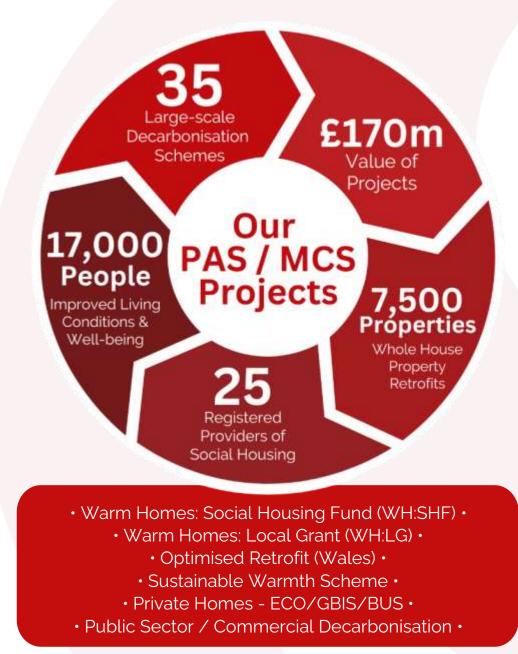
A Sustainable Investments Ltd Company



Sustainable Building Services is a retrofit principal contractor with extensive experience of delivering at scale across all housing tenure types, including social, owneroccupied and private rental homes.

- We manage and deliver energy efficiency, low-carbon heating and microgeneration schemes to MCS / PAS standards and planned maintenance programmes.
- As principal contractor, we handle all aspects of a retrofit journey - supporting clients through project inception, mobilisation, funding management/reporting, to retrofit assessment, design, coordination, measure installation (direct/indirect) and project management.





Collaboration/Working in Partnership

- Our approach is based around full collaboration built on transparency and working in partnership with project stakeholders.
- We understand the importance this has in developing, planning, mobilising and delivering decarbonisation projects at scale.
- We have developed a network of trusted PAS 2035 and PAS 2030 / MCS suppliers and partners.
- This approach has allowed us to help maximise funding for clients, whilst importantly, ensuring projects are delivered compliantly and to funding requirements and deadlines.



SHDF Wave 2.1 – Matrix Pr**Housing Partnership** Total Properties: 905

Works are improving resident health, comfort, wellness, living standards and reducing their energy consumption.

- **(** No. of Lives Improved: 1,750
- Total Carbon Savings (CO₂ emissions (kg/year): 1,629,000
- Total Energy Savings (kWh/year):
 5,973,000





Energy Efficiency/ Decarbonisation Measures: © External Wall Insulation © Cavity Wall Insulation © Internal Wall Insulation © Loft Insulation © Window and Doors © Solar PV © Battery Storage

- Air Source Heat Dur
- Air Source Heat Pumps
- C Low Energy Lighting
- Ventilation Upgrades

Key Lessons Learnt / Considerations

- Embrace Quality Standards PAS 2030:2023 / PAS 2035:2023 / MCS
- Rightly puts the building owner & occupants at the heart of the retrofit journey
- Utilise the right experienced partners drives quality, promotes collaboration, provide dwelling specific data, identify building condition 'issues' (i.e. mould/damp), etc.
- New PAS standards come into effect in 01 April 2025 (Transition in place with SHDF Wave 2.1/2.2/HUG2)
- Work in Partnership One Common Goal
- Requires early involvement by all project stakeholders assign responsibilities
- Sharing of data / key objectives / outcomes
- Effective budget planning will ensure the maximum number of household's benefit
- Importance of Property Specific Data Impacts of Procurement, Mobilisation and Successful Delivery
- Analyse existing property data individual property / archetype retrofit assessments + designs
- Provides supply chain and cost certainty, helps manage household and client expectations
- Allows clients to make informed decisions on budgets and future maintenance/energy programmes

Key Lessons Learnt / Considerations

Effective Household Engagement

- Households (occupants) should be at the centre of all planned works and their needs met, and expectations set
- Varying tenures, neighbouring households, communities and vulnerable occupants all require tailored approaches
- A collaborative communication plan required clear, concise and realistic messaging from project inception and implemented throughout the customer journey
- Residents can be impacted by additional surveys and more complex/time-consuming works without proper engagement with households, no access and refusals increase from a lack of understanding or poor engagement.
- Align Planned Maintenance Programmes
- Look to align energy/decarbonisation works with planned maintenance programmes and escalate work if feasible. This could create cost savings, time-efficiencies and importantly reduce the future impact of work and disruption to households.
- This is especially important where fabric improvement measures and future heating system upgrades are being proposed. Most contractors will be able to programme and deliver associated / additional works.

Other Lessons Learnt / Considerations

- Effective Mobilisation and Project Commencement
- Early engagement with planners, and technical engagement with project stakeholders.
- Engage with utilities providers understand lead times and works required.
- Availability of Asbestos Surveys and key data
- Plan Procurement Route method of appointing contractor / consultants
- Allow for a flexible programme to ensure delivery can keep moving forward.
- Design Meeting Hold early and continue into project delivery to highlight and resolve issues.
- Flexibility in Design outcomes change where required original or desired scope

SHDF Project Examples: Solid Wall / Non-Trad



Number of homes: 653 Project value: £18m

Measures: External Wall Insulation, Loft Insulation, Replacement Windows and Doors, Ventilation Upgrades







Number of homes: 34 Project value: £1.2m

Measures: External Wall Insulation, Loft Insulation, Ventilation, Roof Works, Ventilation Upgrades



Number of homes: 640 Project value: £21m

Measures: External Wall Insulation, Loft Insulation, Windows and Doors, Solar PV, Ventilation Upgrades





Onward

Creating positive spaces

Number of homes: 47 Project value: £2m

Measures: External Wall Insulation, Internal Wall Insulation, Loft Insulation, Ventilation Upgrades





Thank you

Gary Lawson Managing Director



Retrofit Decarbonisation Principal Contractor



Domestic Retrofit Service Consultancy



Smart Technology Solutions Provider



External Wall Insulation System Supplier





Energy Capital Spring Event

11th March 2025

Kevin Clarke Senior Account Delivery Manager Procure Plus







SLIDE DETAIL AND INFO TO BE PRODUCED BY PROCURE PLUS PROCUREMENT TEAM



Working with WMCA



- Conversations with WMCA first started in early 2023.
- Already more than ten procurements ran.
- Setting standards and providing quick, compliant, detailed procurement support to the region and the housing associations.
- Worked hard to increase local contractors on the DPS engaged with more than twenty West Midlands installers to support them in accessing tenders. Doing the same now with decent homes and fire mitigation
- Support along the way with delivery of schemes.
- Local apprentice outcomes and out of region contractors specifically tasked with local apprentice outcomes.





creating value for our communities

Support And increasing the Supply Chain



- Full support from PP everything relating to procurement, specs, contracts, ongoing support post award.
- Great working relationship with WMCA retrofit support.
- Apprentice outcomes embedded in to all procurements.
- Additional social value from Procure Plus via supporting local employment groups.
- Real focus on green skills
- Identified and engaged with more than 20 regional retrofit SMEs.



Any questions?



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West Midlands Account Delivery Manager

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creating value for our communities

Addressing the Green Skills Shortage: Training, Employment, and Supply Chains



Who are Broad Oak?

Established for 23 years on family values

We employ 350 people across the UK

We install 5000 measures per year

We follow a whole house approach

We invest in our people!

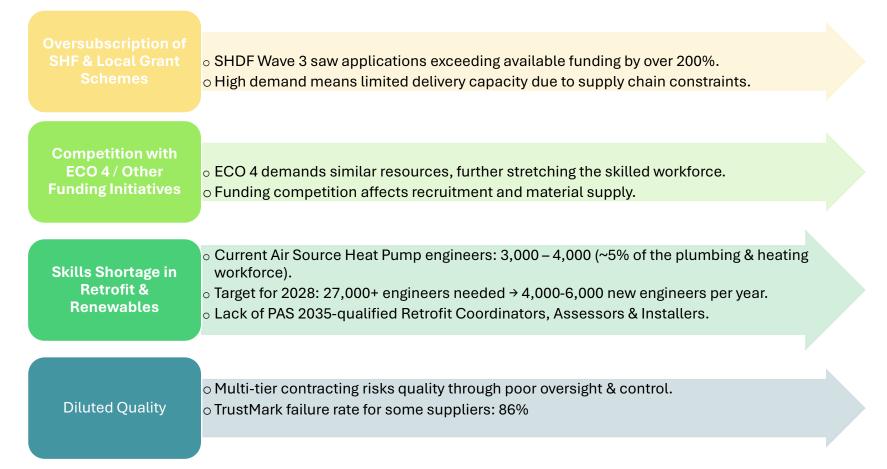


Addressing the Green Skil<mark>ls Shortage</mark>

89

The Skills Shortage Challenge

What Challenges is the Green Skills Sector Facing?



91 Addressing the Green Skills Shortage

Our Approach to Skills Development

What We're Doing to Help

- Local Recruitment
- 3-Year Framework Confidence
- SME Development
- Specialist PAS 2035 Training
- Whole-House Decarbonisation





The Advantage of Direct Employment

Directly Employed Workforce Benefits:

- Faster Mobilisation
- In-House Remedial Works
- 24/7 Emergency Call-out Cover
- Cover for SMEs

Helping SMEs to Grow

- Trained to PAS 2035 Standard
- Upskilling Opportunities
- 5-Day Payment Terms

We're Proud to Have: Managers from Trade Backgrounds

Investing in Training & Apprenticeships

Proactive Skills Development:

- **30+** Apprentices in Training
 - Gas Engineers
 - Heat Pump Installers
 - Electricians
 - Plumbers
 - Joiners
 - Groundworkers

Career Progression

- Surveyors
- Technical Monitors
- Site Supervisors
- Retrofit Assessors
- Retrofit Designers
- Retrofit Coordinators
- 94 Addressing the Green Skills Shortage

- 185 Employees Qualified
 - NVQs
 - Manufacturer System Accreditations
 - Air Pressure Testing Certifications

We're Proud of: Our Partnership with the IAA We're the Chosen SWI Installer for the BBA Our SHDF Clients' Additional Funding Success

Decarbonisation is a Career, not just a Job

Changing how People see Careers in Retrofit:

- Future-Proof Career
- Not Just Site-Based
- Career Progression
- Apprentices are Paid from Day One
- Wages are Rising Fast!
- Demand is **High**

Education and Recruitment Activity:

- Schools, Colleges & Job-Clubs
- Tenant Engagement Groups & Social Media
 Outreach
- Young Offenders & Long-Term Unemployed Programmes





At Broad Oak, we aren't just training our own workforce – we are helping to build the next generation, and we encourage others in the sector to follow in our footsteps to overcome resource challenges & support Net Zero targets.

Thank you



PAS 2038 An introduction

11/03/25 Nigel Griffiths

Technical Expert – WMCA Sustainability Expert – Build It Former Director – Sustainable Traditional Buildings Alliance Technical Adviser – Sustainable Energy Authority of Ireland

What is PAS 2038?

Retrofitting *Non-Domestic* Buildings for Improved Energy Efficiency: Specification

= I square kilometre Floor areas of non-domestic premises in England and Wales HOTELS & TRANSPORT OFFICES SHOPS & COMMERCIAL SERVICES CATERING Petrol Car sales Hotels Garages Parking Commercial offices Central Shops Pubs gov't ARTS & LEISURE **FACTORIES & WORKSHOPS** WAREHOUSES & EDUCATION STORAGE AGRI-CULTURE Schools Glass-Factories houses Warehouses DEFENCE R&D Colleges Univs Works HEALTH SOCIAL & CHURCHES COMM'Y Workshops Storage Hospitals Stores land

Diagram courtesy of University College London Energy Institute (Non-Domestic Building Stock Project)

Characteristics of the non-domestic building stock

- Over 2 million non-domestic premises in England & Wales
- Heterogenous stock: everything from corner shops to The Shard
- Four 'bulk classes': offices, shops, factories and warehouses
- Multiple tenants in some 'base buildings' (e.g. offices, shops)
- Relatively few very large buildings use most energy
- Importance of *services* in retrofit
- Drivers include lettability, aesthetics, change of use, CSR



Aims ("Whole Building Approach")

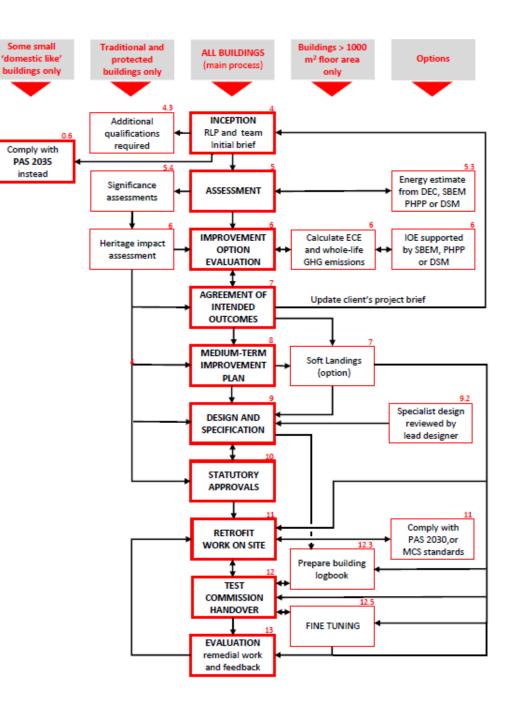
a) improved functionality, usability and durability of buildings;

- b) improved comfort, well-being, health & safety, productivity;
- c) enabling buildings to use low-carbon energy supplies;
- d) improved energy efficiency;
- e) reduced environmental impacts of buildings;
- f) protection and enhancement of architectural and cultural heritage;
- g) avoidance of unintended consequences
- h) minimisation of the "performance gap"



Process

- Similar to PAS 2035
- Importance of Assessment
- Pathway for old buildings
- Importance of Design
- Link to PAS 2030
- Evaluation



PAS 2038: Key Role

"Retrofit Lead Professional" (RLP) = Project Manager

- Selected from the team but appointed by the client
- Should be appropriate to the nature of the project

The role of the Retrofit Lead Professional is to:

- Protect the client's interest and the public interest
- Agree the intended outcomes of the project with the client
- Oversee the project from inception to completion
- Lead the identification, assessment and management of project risks
- Coordinate the work of the project team
- Record and report evidence of compliance with PAS 2038

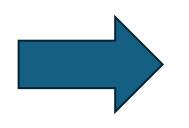
PAS 2038: Assessment

The assessment of the building covers four main areas:

- 1. The **context** of the building
- 2. The **condition** of the building and all its elements
- 3. The occupancy assessment
- 4. The energy performance of the building

The <u>scope</u> of the assessment process is specified in detail in PAS 2038, but includes:

- Appraisal of heritage, features, structure, construction and condition
- Identification of constraints imposed by the site
- Identification of regulatory, heritage and performance constraints
- Identification of defects –structure, construction, moisture



Medium Term Improvement Plan

PAS 2038: Option for small buildings

PAS 2038 includes an option for some smaller buildings with 'domestic like' construction and services to comply with <u>PAS</u> <u>2035</u>, provided that:

- Floor area $\leq 500 \text{ m}^2$
- Not more than 3 storeys (including any basement)
- Load-bearing solid or cavity masonry or timber-framed wall construction, clad with brick or timber
- Mostly pitched roofs with timber structure, finished with slates or tiles
- no central air handling, mechanical cooling or air conditioning
- The Retrofit Coordinator must be a qualified Non-Domestic Energy Assessor (NDEA) as well as holding the RC's Level 5 Diploma.
- The modelling software used for IOE must be SBEM
- Compliance with PAS 2035 must be self-certified by the Retrofit Coordinator



PAS 2038: Traditional & Protected Buildings

Assessment of traditionally constructed and protected buildings must include:

- An assessment of 'significance' in accordance with BS 7913:2013 *Guide to the conservation of historic buildings;*
- An assessment in accordance with BS EN 16883:2017

If the building is found to be significant:

- A structural engineer's report is required on the condition of the building and its suitability for retrofit;
- A Heritage Impact Assessment as required by the National Planning Policy Framework (NPPF) must be carried out in accordance with BS EN 16883:2017;
- Significance must be taken into account when identifying and specifying appropriate improvement measures at the IOE and design stages.

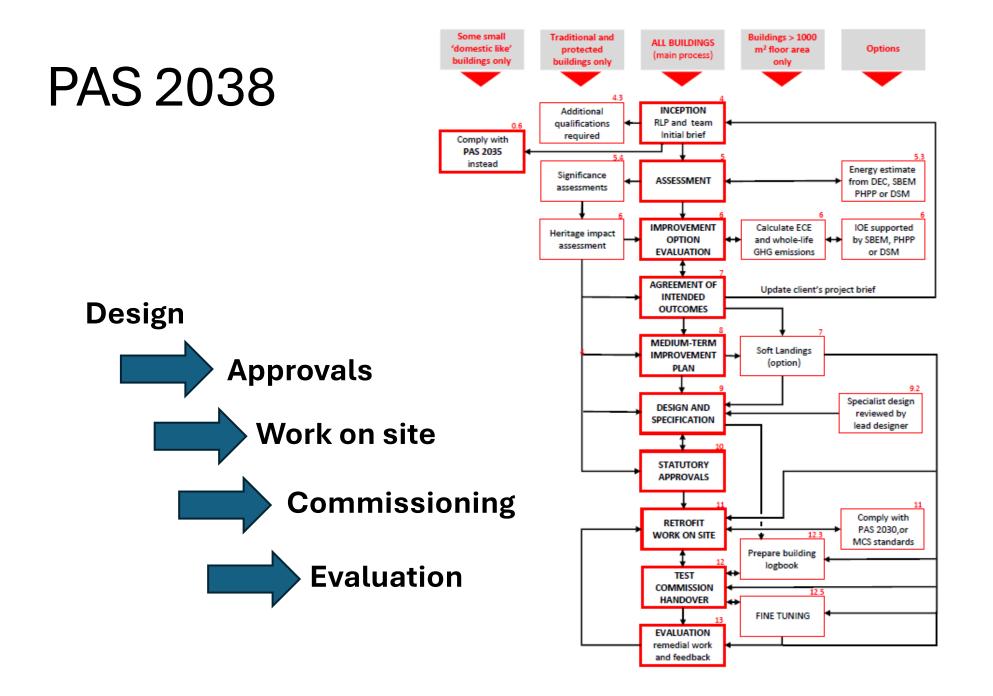


PAS 2038: Design

The retrofit design must be prepared by qualified persons.

The retrofit design must be based on:

- The client's brief;
- The retrofit assessment report;
- The improvement option evaluation report;
- The agreed intended outcomes;
- The project budget;
- The improvement plan for the building;
- A current fire risk assessment.



PAS 2038 An introduction

Thank you for your attention

Nigel Griffiths

Technical Expert – WMCA

Sustainability Expert – Build It

Adviser (Former Director) – Sustainable Traditional Buildings Alliance

Technical Adviser – Sustainable Energy Authority of Ireland

WARMER HOMES, HEALTHIER RESIDENTS

Rachel Jones

save money and the environment

Act

Energy

ENERGY EFFICIENCY...

It's a people business. That's our business.



Who we are...



- An energy advice charity with more than 25 years' experience
- ▶ We cover the West Midlands (WMCA area) and Warwickshire, Worcestershire

► We offer...

- Freephone advice line for all residents
- Community outreach in-home support and community events
- Access to grants and support funds
- Regional Vulnerable Customer Support Organisation of the Year 2025



OUR VISION

A net zero-carbon

community, free from

fuel poverty



We are passionate that everyone has a right to live in a warm home that they can afford to heat, with minimum carbon impact

A growing need



We offer impartial expert energy advice -

from energy efficiency to billing support

- ▶ 17,000+ callers to our helpline
- > 2,000 home visits
- 400 frontline workers trained
- £1m+ distributed in energy support

payments

Current issues

Continuing high prices -£400 more than 3yrs ago

- Winter Fuel Payment increased focus
- But not just pensioner issue
- Energy rationing & self-disconnection
- Many finding it hard to pay energy bills
- National energy debt at more than £3.8 billion



The context

Warwickshire	262,065	42,545	16.2
North Warwickshire	28,559	5,160	18.1
Nuneaton and Bedworth	58,541	10,188	17.4
Rugby	48,635	7,517	15.5
Stratford-on-Avon	61,492	10,136	16.5
Warwick	64,838	9,544	14.7
West Midlands (Met County)	1,171,489	254,926	21.8
Birmingham	438,509	105,201	24.0
Coventry	138,897	30,886	22.2
Dudley	141,762	26,711	18.8
Sandwell	134,723	29,683	22.0
Solihull	92,611	13,083	14.1
Walsall	116,132	24,371	21.0
Wolverhampton	108,855	24,991	23.0
Worcestershire	268,849	44,382	16.5
Bromsgrove	42,674	6,066	14.2
Malvern Hills	36,082	7,007	19.4
Redditch	37,630	5,533	14.7
Worcester	46,267	7,436	16.1
Wychavon	59,336	9,768	16.5
Wyre Forest	46,860	8,572	18.3

Fuel Poverty

Latest fuel poverty info: West Midlands top spot 2022 Proportion of households fuel poor 21.8% (v 13.1% England)

And the Fuel Poverty gap

- FP inefficient homes pay £400 more for their energy each year... than the same EE household.
- Highest gap since 2010.

WE'VE BEEN PATCHING UP...





HSF

EPG

Price Cap

But the sticking plasters won't last

Enerc

So what to do?

With limited savings from fixed tariffs

or substantial cuts in the price cap, the only way to substantially reduce energy bills, while still adequately heating and powering homes, is to improve the energy efficiency of properties.

But years of bad headlines...

'They encouraged us to insulate our home. Now it's unmortgageable'

UK householders are angered by the discovery they cannot remortgage or sell their homes after installing spray-foam insulation to cut energy use





Means trust is very low

Trust [trast] n confidence in dependence

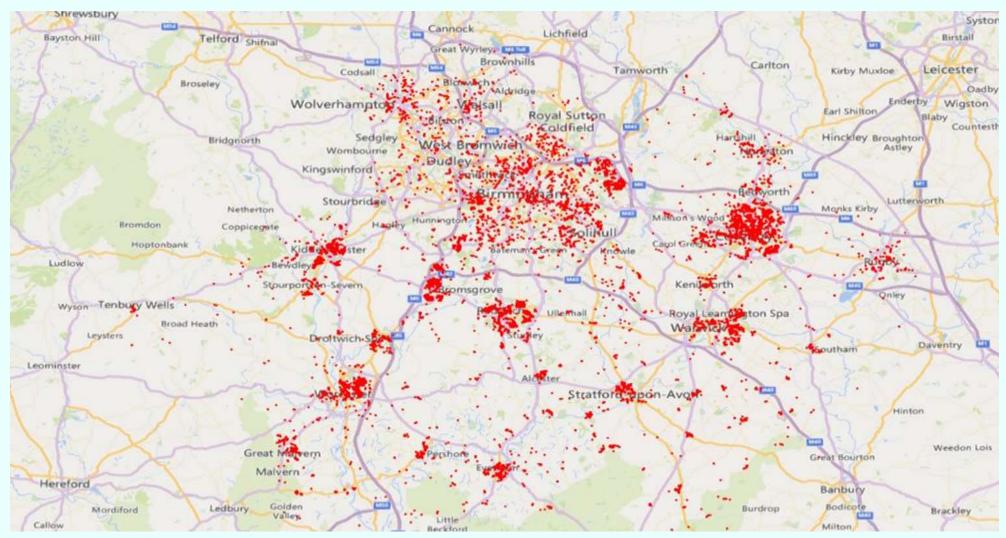
And that's where we can help

CUSTOMER JOURNEY SUPPORT





OVER 20,000 CONTACTS LAST YEAR ALONE



An experienced, safe pair of hands

- Supported LAs for years
- LADS 1, 2 & 3, HUGS 1 & 2
- We've hand-held customers on their journey
- From lead generation to resident liaison
- Processing applications and gaining approvals
- Engaging with residents before, during and after the full retrofit process
- Fully equipped post-work support

The retrofit is only as good as the changes it makes to people's lives





Step-by-step, but always resident centred

A positive outcome

- No more damaging headlines
- Residents feel supported with someone
 to talk to along the journey
- They trust the process but know where to go for advice
- Our communities are warmer and healthier – in their homes



THANK YOU

Contact us: 0800 988 2881 www.actonenergy.org.uk

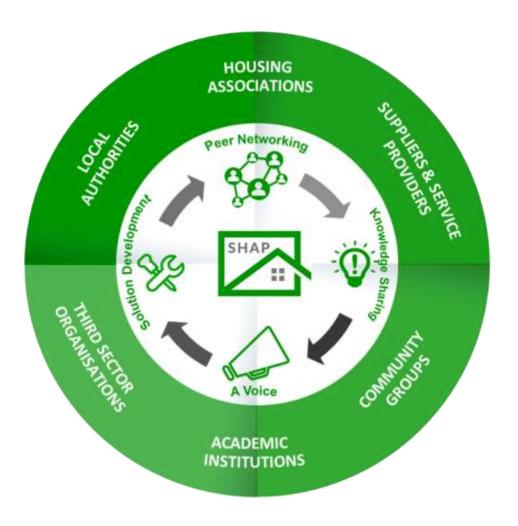
e: advice@actonenergy.org.uk

Professional Referrals can be made at: actonenergy.org.uk/referral



Sustainable Housing Action Partnership (SHAP)

Rethinking Retrofit: Transforming Retrofit Delivery Through Devolution













SOLUTION DEVELOPMENT

Sustainable Housing Action Partnership (SHAP)

- A system-wide network with a West Midlands heart and national reach.
- Registered Providers in SHAP's network have over one million social homes between them.





SHAP Board









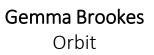


Steve Hale St Basils Treasurer

Rebecca Reynolds Equans

Ellie Horwitch-Smith Birmingham City Council Chair

Carl Yale Lovell





Gordon Watts Energy Saving Trust

Gemma Voaden Together Housing





Peter Harte Progress Housing

Rethinking Retrofit: Transforming Retrofit Delivery Through Devolution

- **Retrofit programmes continue to face recurring challenges:** incorrect housing data, delays, unexpected costs, supply chain skills and availability, disengaged residents, and disruption to communities.
- There are resources available to tackle this: providing solid process-level retrofit guidance.
- SHAP's network is calling for more practical guidance: grounded in real-world delivery experiences, together with ambition to effectively scale-up retrofit.
- Two objectives for this project:
- Raise the baseline improve retrofit standards by promoting best practice and lessons learned, from this network.
- Exploring more innovative and entrepreneurial approaches to retrofit Devolution presents an opportunity to do things differently.









Rethinking Retrofit: Transforming Retrofit Delivery Through Devolution

- SHAP is developing a 'Retrofit Success' guide: uniquely drawing on the real-world knowledge and collective experience of those who have directly contributed to retrofit programmes.
- Four collaborative workshops are taking place:

9.00 – 12.30 on:	Thursday 3 rd April (in person)
	Monday 7 th April
	Wednesday 9 th April
	Thursday 10 th April (in person)

- We want people to attend who want to drive standards up and share their ideas and aspirations for operating differently/better.
- **Contact** Poonam Sakarsudha at <u>comms@shap.uk.com</u> for further details









Panel Session





