



## **WMCA Devolved Retrofit Pilot – FAQs**

**December 2024**

### **1. What is the Devolved Retrofit Pilot?**

The Buildings Retrofit Pilot (the Pilot) is part of the Integrated Settlement between West Midlands Combined Authority and government, announced in March 2023. It represents a major opportunity for the West Midlands to move away from nationally delivered, competitive, funding schemes, which are not shaped around the needs of our people and places. In the past, it has been hard to fit national schemes around our needs and therefore they have not achieved the full range of potential benefits.

The Pilot will enable better co-ordination of investment at a local level and support a place-based approach to retrofitting. This model centres around the needs of the region, its communities and people, and the opportunities within the net zero transition that can only be unlocked by channelling investment into locally relevant outcomes and by coordinating activities to create greater impacts.

To bring about this change, partner organisations will have the opportunity to work with the WMCA to design and deliver the pilot and ensure it can provide the best outcomes for the region. Partner organisations that will be eligible to apply for funding are Local Authorities (LAs), Registered Providers of Social Housing (RPs) and Public Sector Bodies (PSBs).

Rather than allocating funding through competition, which can close off some opportunities for collaboration, WMCA will allocate funding based on a fair share for each organisation where possible (see Q12 for more detail). The application process will be collaborative, and partners (LAs, RPs and PSBs) will be encouraged to work collaboratively with the WMCA to develop and implement projects that deliver a wide-ranging set of outcomes that benefit the region, including carbon savings, reduced fuel poverty, job creation, health improvements and economic growth. In turn, WMCA will support partners through technical assistance, delivery support and regional initiatives that support market growth.

### **2. How long will the Pilot run for?**

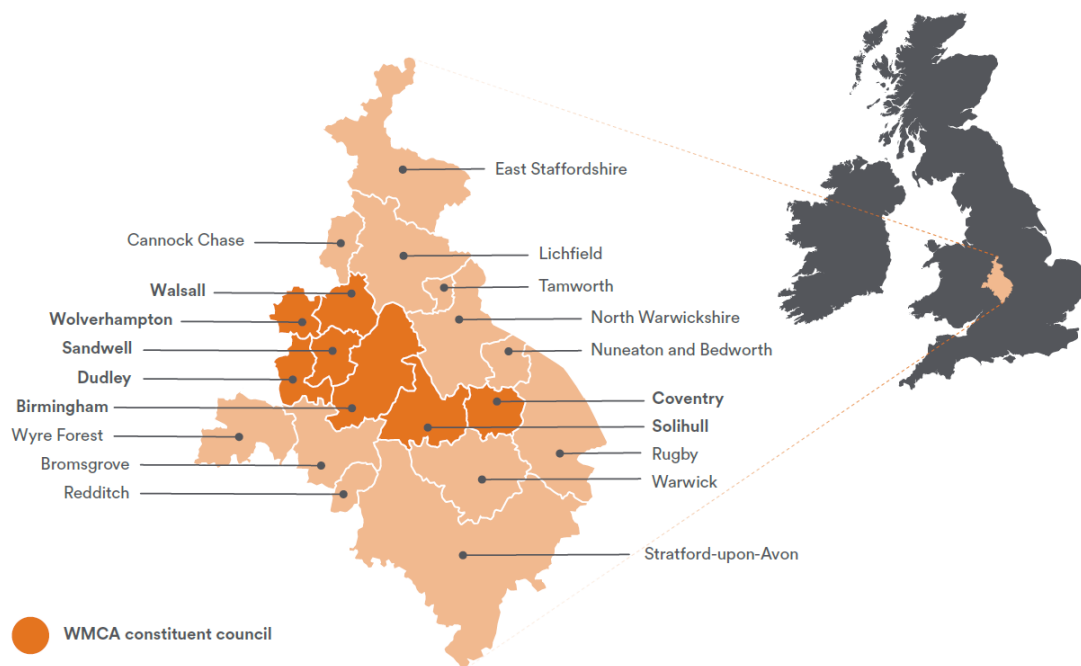
The Pilot will run for three financial years, from April 2025 to March 2028.



### 3. Which Local Authorities, organisations and buildings are eligible for the Devolved Retrofit Pilot?

The Pilot's eligible area consists of the West Midlands County, including the town and parish councils within them. These are:

- Birmingham City Council, Coventry City Council, Dudley Metropolitan Borough Council, Sandwell Metropolitan Borough Council, Solihull Metropolitan Borough Council, Walsall Council, and City of Wolverhampton Council.



As funding is being devolved through WH:SHF, WH:LG and PSDS, all eligible buildings and organisations within scope of these schemes will be included as a minimum within the Pilot. This includes all of the following within the Pilot area:

#### Domestic Buildings

- Social rented, EPC D-G homes ([WH:SHF](#))
- Private sector (owner occupied or privately rented), fuel poor homes (EPC D-G and low-income) ([WH:LG](#))
- All other homes: subject to meeting the minimum targets as set out in the Outcomes Framework

#### Domestic Applicants:

- Local Authorities
- Registered providers of social housing (including housing associations and arms-length management organisations (ALMOs) that are registered providers)
- Registered charities that own social housing



- Private homeowners/landlords/householders (where the building owned as a freehold, leasehold or shared ownership)

## Public Buildings:

- Emergency Services
- Community and mental health NHS trusts and foundation trusts (i.e. all non-acute trusts)
- All schools in the state education system (i.e. maintained schools, academies, multi-academy trusts and free schools)
- Further education institutions and colleges
- Exclusions with WM County:
  - Central Government departments and their arm's length bodies
  - Acute and cancer NHS trusts and foundation trusts
  - Higher education institutions – these must satisfy the eligibility requirements related to the Procurement Act 2023.
  - These PSBs must apply to the [national PSDS scheme](#).
- NB: it is expected that PSBs submit proposals for funding through their Local Authority—with the exception of cross-region PSB, where a proposal for multiple buildings across multiple LAs might be made. Please see the relevant section on funding allocation in the scheme guidance once published.
- See the national PSDS scheme guidance criteria from Salix for devolved administration eligibility: [Phase 4 - Devolved authorities | Salix Finance](#)

The construction of new buildings is not within the scope of the retrofit pilot. The main focus is on a just transition of existing buildings to a net zero future.

## 4. How much funding will the Buildings Retrofit Pilot receive and how has this been calculated?

As part of the Integrated Settlement, DESNZ will be allocating part of each of three national building retrofit programmes to the WMCA, as set out in the table below. At the time of writing, the exact amounts cannot be made public, but will represent a fair share of these programmes for the West Midlands.

Funding Stream	National Pot (indicative)	WM Quantum (known)	WM Pilot Budget
Warm Homes: Social Housing Fund (WH:SHF)	£1,300m	7.8%	~£170m based on May 2024 estimates
Warm Homes: Local Grant (WH:LG)	£500m	6.0%	



<b>Public Sector Decarbonisation Scheme (PSDS)</b>	£1,000m	3.6%	
<b>Total</b>	£2,800m	~5.9%	

Detail on how the government has calculated the WMCA's fair share of the national funding programmes can be found below.

<b>National Funding Scheme</b>	<b>Regional (WMCA) Quantum Based On</b>
<b>Warm Homes: Social Housing Fund (WH:SHF)</b>	Number of social rented homes EPC D and below in as a percentage of the national total (based on English Housing Survey data) - 7.8%
<b>Warm Homes: Local Grant (WH:LG)</b>	Number of private sector fuel poor homes as a percentage of the national total (based on English Housing Survey data) - 6.0%
<b>Public Sector Decarbonisation Scheme (PSDS)</b>	Total public sector floor area in WMCA area as a percentage of the national total (based on DEC data) - 3.6% (does not include universities or acute hospitals)

WMCA will apply the same principles to allocating a nominal funding amount to partner organisations, as per the table below, and expanded upon in Question 10. We aim to provide further details of funding allocations as soon as possible, though this is subject to agreeing publication of details with DCLG.

<b>National Funding Scheme</b>	<b>Eligible organisations</b>	<b>Partner Quantum Based On</b>
<b>Warm Homes: Social Housing Fund (WH:SHF)</b>	RPs	Number of social rented homes EPC D and below for each RP as a percentage of the regional total (based on RP data), minus WMCA top slice for admin of fund, technical assistance, regional initiatives ( <b>note:</b> a slightly different approach will be taken for smaller housing associations with fewer than 1,000 homes)
<b>Warm Homes: Local Grant (WH:LG)</b>	Local authorities	Number of private sector fuel poor homes as a percentage of the regional total (based on EHS data), minus WMCA top slice for admin of fund, technical assistance, regional initiatives



<p><b>Public Sector Decarbonisation Scheme (PSDS)</b></p>	<p>Local authorities and Public Sector Bodies (excluding universities and acute hospital trusts)</p>	<p>Total public sector floor area in LA as a percentage of the regional total (based on DEC data), minus WMCA top slice for admin of fund, technical assistance (<b>note:</b> while we expect most funding to be allocated to LAs, a funding pot for other public sector organisations will also be created)</p>
---	--	--

## 5. What would constitute success for the pilot?

The Department for Energy Security and Net Zero (DESNZ) and WMCA will agree a series of outcomes targets for the pilot (the Outcomes Framework). Projects funded through the Pilot will need to support delivery of these outcomes (see Q6). The pilot will ultimately be successful if:

- It is able to deliver the targets set out within the Outcomes Framework
- A decision is taken to extend the Pilot or the funding arrangements are made permanent (i.e. government, WMCA and regional partners agree that this is worth doing)
- It can successfully demonstrate how and why a regional approach to retrofit has the potential to scale retrofit market activity and deliver much wider social, environmental and economic impacts

## 6. What is the Outcomes Framework and how will it impact my projects?

The Outcomes Framework, negotiated between the WMCA and DESNZ, governs the primary and secondary outcomes the Pilot needs to achieve. Negotiations are ongoing at the time of writing.

Targets for the Pilot’s performance will be set for the primary outcomes only. The primary outcomes are likely to comprise fuel poverty alleviation (homes only) and reductions in carbon emissions (homes and public sector buildings).

Secondary outcomes will likely cover health and wellbeing, skills, housing decency, supply chain capability and capacity and market growth, delivery into hard-to-reach/hard-to-treat/complex-to-decarbonise buildings, value for money, and leveraged private investment.

All projects funded through the pilot will be expected to contribute a fair share of primary outcomes, and to report on progress against both primary and secondary



outcome indicators. For example, if a partner is 20% of the relevant funding, they will be expected to develop projects that achieve 20% of the outcomes must be achieved.

Beyond these targets, there will be flexibility for programmes or Local Authorities to adjust their approach to be more place based, cross tenure and holistic. This could mean including buildings that may have previously fallen out of scope or not met stringent eligibility criteria for the national schemes.

For example, individual buildings of this type (e.g. those with low value for money or outside of minimum eligibility criteria) may be incorporated if balanced with higher- or over-performing buildings within a broader programme. This approach supports an area-based, mixed-tenure approach that enables greater efficiencies, economies of scale, cost reductions, community involvement and other wider qualitative and quantitative benefits, all of which will inform scheme learnings and evaluation to evidence the successes and grow this approach in the future.

We are currently drafting scheme guidance, which will include the full list of outcomes and requirements (likely to be published in January 2025).

## 7. What are the timelines for the Pilot's development and delivery, and when will we be able to access funding?

The Pilot is currently being developed by the WMCA, in consultation with Local Authorities, Housing Associations, Public Sector Bodies and wider stakeholders.

Between now and April 2025, the focus will be on:

- Completing and securing WMCA Board approval for a Programme Business Case, which sets out the broad structure and governance for the Pilot
- Establishing programme governance and setting up essential structures and processes.
- Drafting and publishing scheme guidance
- Working with partners to understand ambitions and develop a pipeline of projects
- 

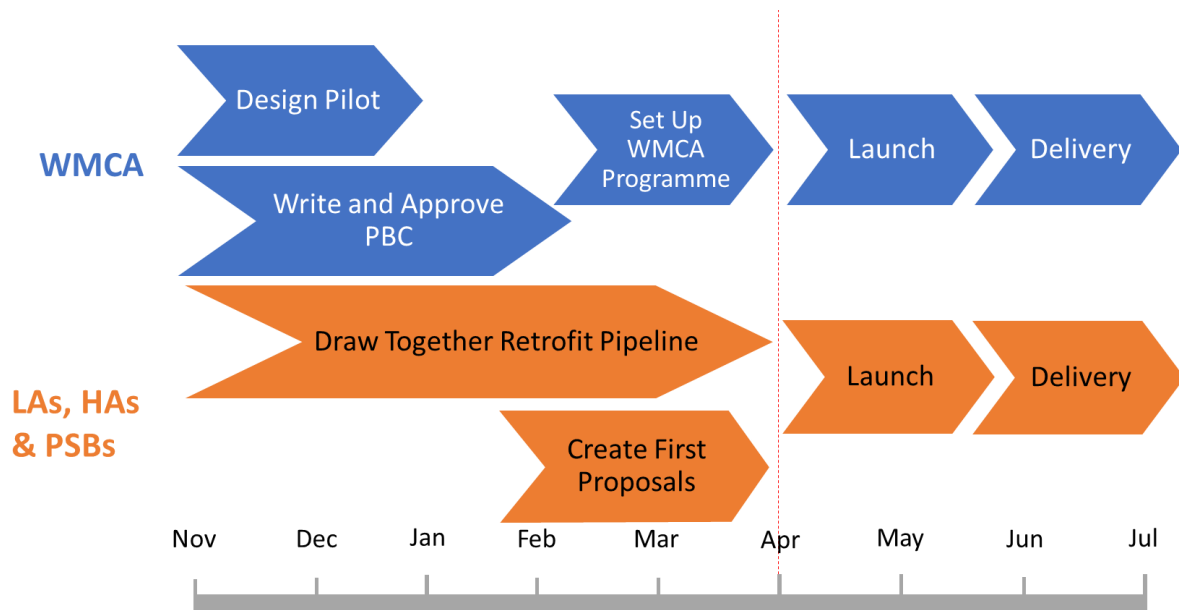
We aim to start accepting funding proposals from April 2025. We therefore encourage prospective partners to engage with us from now to discuss their pipeline of potential projects and plans for delivery.

From April, we aim to start awarding funding for project development activities as part of a two stage approval process.



Funding under the Pilot will run for three financial years, from April 2025 to March 2028, with flexibility over this period to advance place-based retrofit projects through two stages: development and delivery. Due to funding being relatively backloaded into years two (~40%) and three (~40%), year one (~20%) will focus more heavily on project development and pipeline and market growth.

An indicative timeline has been developed below:



## 8. As an eligible organisation for the Retrofit Pilot, can I still apply to the national funding schemes and opt out of the regional one?

If you are eligible for the Pilot (see Question 3 for further details) then you will be ineligible for the national scheme. Retrofit funding within the Pilot area must instead be drawn down on through WMCA.

## 9. If I am eligible for funding but my project/buildings span across the geographic border of the WM County and wider WM Region, will I have to make two applications?

As an eligible applicant, you can apply for funding for buildings within the Pilot area (see Question 3 for details). For buildings outside of this area, WMCA and DESNZ retain the right to decide on funding on a case-by-case basis.

For example, a project may be considered if the majority of building stock lies within the West Midlands County, with only a small proportion – typically in the range of tens of



homes or a single-digit percentage of the total eligible stock – being in a nearby bordering area. Where stock is located significantly further away, or outside of the Pilot area, it is less likely to be included within the scope of the Pilot and funding through the national scheme should be sought.

This discretion works both ways: projects within the WMCA may also be included in the national scheme if a significant proportion of the stock is outside of the West Midlands County and only a small amount within the devolved area.

Please reach out to the WMCA Devolved Retrofit team for any questions, and particularly where projects may fall into this description: [Devolved.Retrofit@WMCA.org.uk](mailto:Devolved.Retrofit@WMCA.org.uk).

## 10. How will the pilot interact with national policy on retrofit?

The Retrofit Pilot is being trialled by DESNZ to assess whether devolving funding to a regional can enhance the impact of public spending on retrofit and generate better outcomes. Since the funding is devolved from the three national schemes (see Question 3 for more details), the targets and outcomes set for the Pilot will mirror those of the national schemes.

Therefore, the Pilot must ensure it is delivering fuel poverty alleviation and decarbonisation, particularly in specific tenures like social housing, privately owned housing and public buildings. Provided these minimum delivery targets are met, the West Midlands will have the flexibility to trial new or innovative approaches to retrofit delivery. This flexibility will allow the region to generate additional cross-cutting benefits across economy, skills, health, energy networks and infrastructure, and wider society.

Where additional Net Zero policy areas or responsibilities are devolved to the West Midlands, we will aim to take a coordinated approach to delivery. A comprehensive list of Net Zero devolution areas is detailed on our website: [Devolution of powers on energy | Energy Capital West Midlands Combined Authority](#).

We would strongly encourage partners to pursue source additional opportunities to supplement Pilot funding, such as through other government funding schemes, such as the Heat Network Efficiency Scheme, Public Sector Low Carbon Skills Fund, Green Heat Network Fund, Energy Company Obligation, Boiler Upgrade Scheme, Energy Company Obligation, etc. The only national grants that eligible partners cannot apply to are the three schemes which have been devolved to the Combined Authority: Warm Homes: Social Housing Fund, Warm Homes: Local Grant and Public Sector Decarbonisation Scheme.

WMCA will also be seeking to progress activities in a number of areas that will enhance the region's ability to deliver against regional and national policy objectives. This





approach includes aligning the Retrofit Pilot with Minimum Energy Efficiency Standards (MEES), developing regional energy advice services, creating financial instruments/models for leveraging private investment, co-ordinating heat network zoning and planning strategic energy systems, among other areas.

## 11. What are the roles of the WMCA, Local Authorities, Housing Associations and Public Sector Bodies?

### **The WMCA will:**

- Be responsible for co-ordinating and consolidating learnings from the Pilot to ensure that insights are captured and applied effectively.
- Oversee programme administration and management, ensuring that the Pilot operates smoothly and aligns with strategic goals.
- Manage data related to the Pilot and report on outcomes to central government, providing transparency and accountability.
- Gather insights, commission research and conduct evaluation to evidence successes and improve future initiatives.
- Support applicants in project and pipeline development, retrofit delivery and project management, and provide technical and project support to ensure they have the resources and guidance needed to succeed.
- Play a role in fostering market development, leading initiatives that support the retrofit market, such as exploring development of a regional energy advice service and customer journey support, and investigating how to attract private investment into retrofit and net-zero projects through initiatives like the Local Net Zero Accelerator.

### **Local Authorities, Housing Associations, and Public Sector Bodies will:**

- Develop retrofit projects. Where possible these should take a place-based approach
- Manage the delivery of these projects, ensuring compliance with standards and achieving the set delivery targets, milestones and KPIs.
- Monitor, collect and report on data generated from these projects and programs, contributing valuable information for analysis and future planning.
- Be able to participate in and benefit from regional initiatives that support the broader goals of the Pilot.



## 12. How will funding be divided between Local Authorities, Housing Associations and Public Sector Bodies?

As outlined in Question 3 and 4, the allocation of funding for partner will be calculated based on the number of eligible homes or proportion of public building floorspace.

For large Housing Associations (over 1000 stock), there will be an initial period of consultation allowing them to confirm their interest in using their full funding allocation. This consultation period is likely to run for 3 to 6 months.

For smaller Housing Associations, the devolved budget will be used to fund a managed service that will support these organisations through project scoping project management, procurement support, contract management and project delivery. More detail on this service is given in answer to Question 13.

Where possible, organisations should seek to collaborate on bringing forward place-based approaches that draw together funding allocations – e.g. a local authority and a housing association might work together to ensure that a project can cover all tenures of homes across an area. With this in mind, we encourage eligible organisations to collaborate directly with each other to develop project proposals.

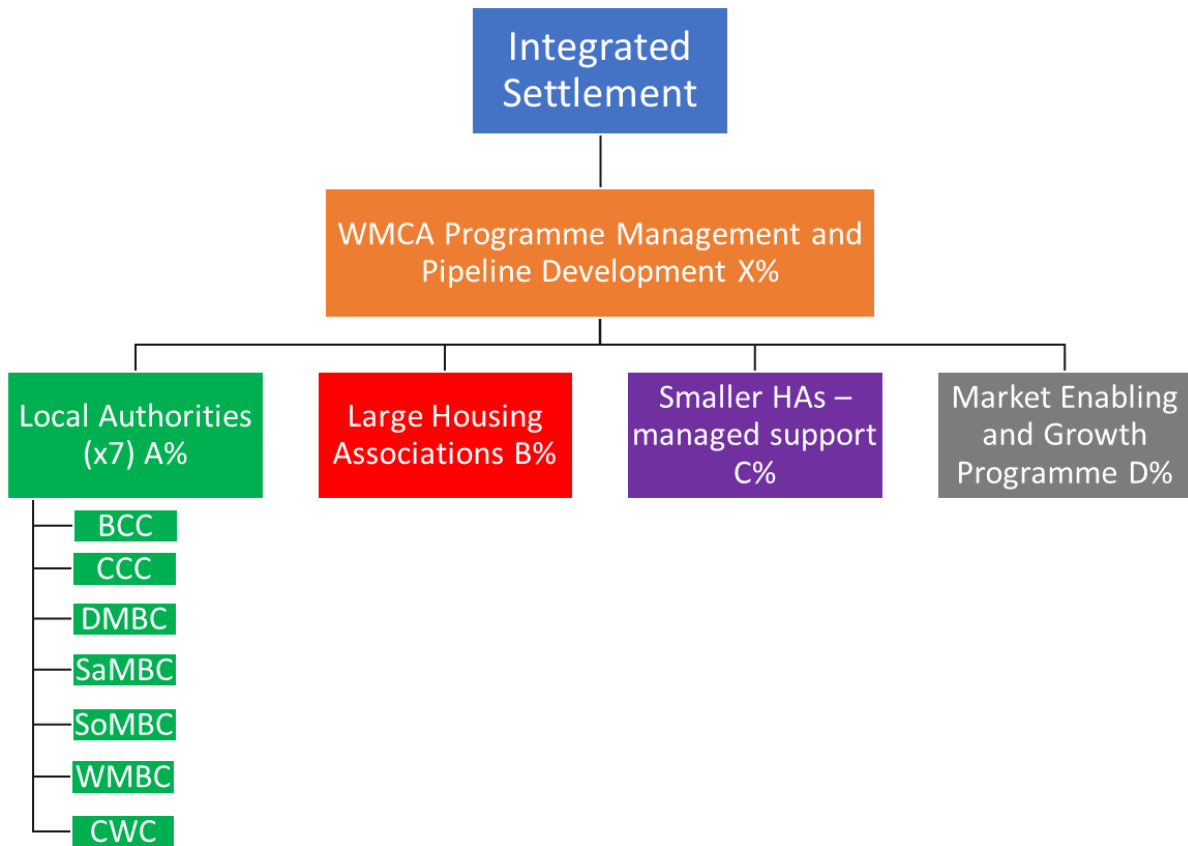


Figure 1: funding allocation process for the domestic buildings scheme.

For public sector buildings, each Local Authority will be allocated funding based on the proportion of public sector building floorspace within their area relative to the regional proportion. Note that this excludes acute healthcare trusts and higher education institutions (universities). This allocation is represented by Pots A through G below.

To ensure a coordinated approach across all public and domestic buildings, We are encouraging all Public Sector Bodies to consider working with their Local Authorities and ensuring their bids form part of a place-based intervention within a local area.

However, recognising that it will not always be practical for organisations to work in this way (for example, where an organisation owns sites in multiple local authorities or wants to bid separately to LAs), a separate pot will be made available (Pot H). This will allow PSBs to submit proposals directly to the WMCA (with relevant Local Authority support or consultation) to draw down on funding. Funding and outcomes will be balanced and accounted for as appropriate. This may keep an element of ranking/competition to target funding into projects that, for example, have the lowest cost per tonne of carbon abated (£/tCO<sub>2</sub>). However, we will be undertaking further engagement to understand likely demand and scope of these projects better.

We are keen to ensure funding is allocated as fairly and practically as possible to unlock as many regional and local benefits as can be attained. As part of this, we are seeking to apply a soft funding cap for educational buildings. This could see ~30-35% of allocated funding required to be used for retrofitting educational buildings (schools within the state education system, academy trusts, and further education institutions and colleges).

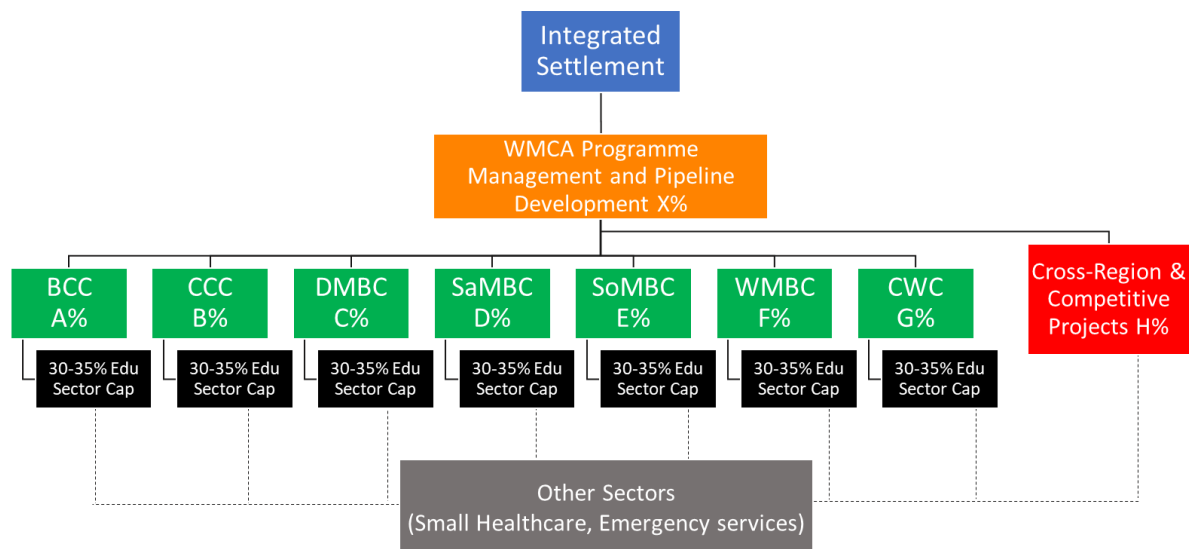


Figure 2: funding allocation process for public sector building scheme.



Across all pots of funding, where an organisation is unable to draw down its full allocation of funding, surplus funding will be reallocated. The process for reallocation is still to be determined.

### 13. How will I be able to access funding under the Retrofit Pilot and will I receive any support?

Our aim is that by removing competition from funding allocation as far as possible, the process of developing funding proposals and projects can be open and collaborative, enabling sharing of best practice and creating opportunities to coordinate funding.

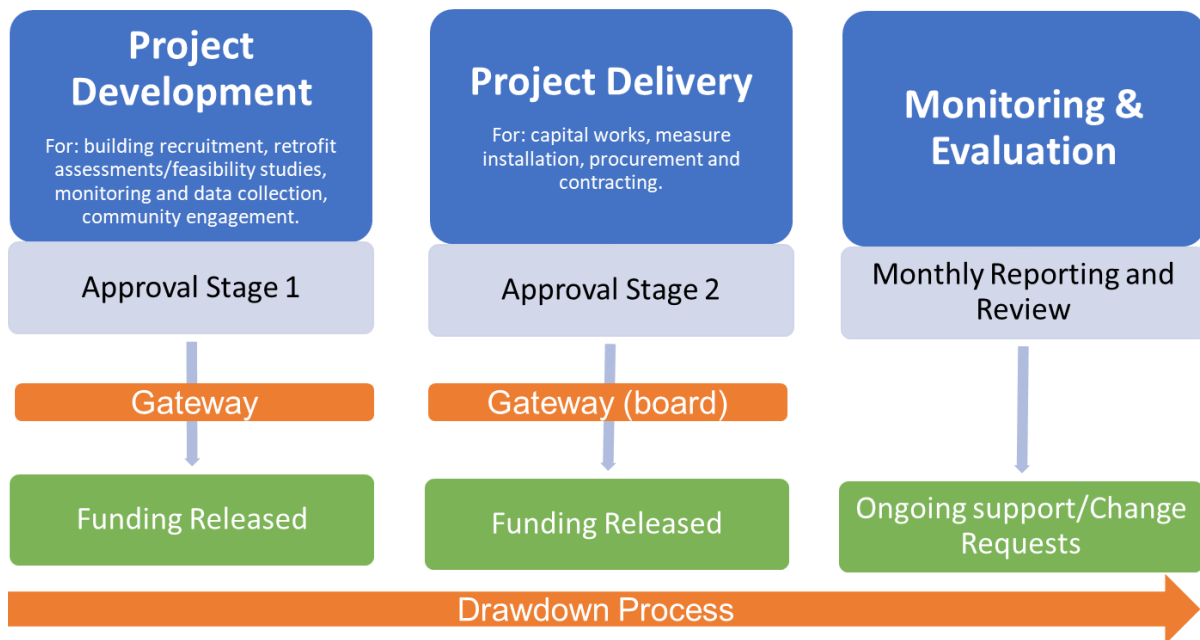
The Pilot will use a two-stage process, allowing eligible applicants to draw down on their funding allocations in two phases: first for project development, and then for project delivery, as shown in the diagram below.

The reason for proposing a two-stage process is that during the development of a project (including but not limited to surveys, retrofit assessments, resident engagement, procurement), the costs and scope of a project may change significantly. By allocating funding first for development, and then for delivery of projects, we aim to increase certainty over funding allocation and manage project risks better.

This should also avoid the need for excessive change requests and will ensure that the information provided is accurate and timely. The model also ensures that projects will be able to access funding, not only for development, but also for full capital delivery and any additional changes or additions within a project or programme.

Funding can be applied for through this model in two ways: either for individual projects or for broader strategic programmes that will cover multiple, coordinated projects.

The outline steps are detailed in the figure below.



Proposals will have to pass through two approval gateways in order to access each phase of funding. Further detail will be published with the scheme guidance.

**Project Development:** In this phase, eligible applicants will be able to access funding to build their project pipeline and develop detailed, actionable programmes of work subject to passing through Approval Stage 1. Development funding can be used for a range of preparatory activities, including identifying and recruiting buildings, engaging with communities and building occupants, coordinating with supply chain and delivery partners, conducting retrofit assessments, performing feasibility studies and initiating early monitoring and data collection. During this stage, applicants will have opportunities to engage with the programme team, receive technical feedback and explore options to strengthen their submission. It is likely this funding will be accessed quickly through submitting a light-touch business case or expression of interest to mobilise the project development stage.

**Project Delivery:** In this phase, eligible applicants will be able to access full capital funding for project delivery, subject to passing through board at Approval Stage 2. Applicants must submit detailed information and data gathered during the development stage as part of an in-depth business case. This more detailed submission must include full delivery costs, a breakdown of proposed works and measures, expected performance against outcomes, as well as detailed management, resourcing and procurement plans.

Local Authorities and large HAs are responsible for presenting a pipeline of projects that meet minimum eligibility requirements and contribute to overall outcomes. Additionally, there will be ongoing support available to LAs and eligible applicants in the form of a Technical Assistance Facility. This facility will provide support for co-developing projects,



refining proposals for submission and offering constructive feedback to strengthen applications.

Funding not drawn down on, or plans submitted for doing so, within the first 12 months of the Pilot are subject to reallocation. This funding may be to other eligible applicants that have deliverable projects or to other pots of funding. As continual engagement activities are expected between the WMCA and regional eligible applicants across the first year, we expect most allocated funding to have a spending plan.

## 14. How can WMCA support eligible applicants on project management and delivery?

Following the success of the WMCA supporting role across previous delivery programmes, increased support will be available to those who require managed support services through both the pre and post stages of delivery of home retrofit projects. The various support roles and associated fee structure will be in the form of an agreed Service Agreement between the WMCA and the applicant, with the costs of this covered by the applicant's project budget. Support services available include the following:

- Managed PAS 2035 Retrofit services including Retrofit Assessments, Retrofit Coordination through to post EPC and lodgement, all assessors and coordinators will be fully accredited
- Full technical advisory and Trustmark compliancy support, incorporating pre installation checks following installers PIBs /surveys, clarification of compliant measures
- Full PAS compliant design service including planning applications, permitted development rights (PDR), conservation applications
- Coordination and evaluation of planning applications through our qualified Project Coordinator MCIOB or equivalent
- Retrofit Resident advisor to assist and advise through the Customer Journey process
- Quality/compliance monitoring through installation process, by a designated COW
- Pre handover quality check and remedial report including resident handover pack
- Project Management support lead by an APM/RICS accredited manager, to assist and advise with reporting, evaluation and coordination, throughout delivery
- Procurement support through a fully compliant competitive tender process, including full ITT and associated documents and specification



- Tender evaluation guidance and analysis along with all relevant contract documentation i.e. JCT forms of contract and associated warranties

## 15. Is revenue funding still being made available for projects within the Retrofit Pilot?

Given the scale of the projects, applicants are expected to incur administrative costs and ancillary (A&A) costs (revenue activity) associated with project and programme delivery. The combined A&A costs (both grant-funded and co-funded) should not exceed 15% of the total project expenditure, as is standard through the national schemes. This includes all sources of funding—both grants and co-funding—for capital costs related to retrofit works as well as A&A costs.

Applicants should be consistent in their categorisation approach and determine how they will categorise project costs at the outset. We will be publishing further information on this in our scheme guidance, but advise that you work closely with your accounting officers to ensure that project expenditure is monitored and allocated appropriately.

WMCA's own administration and programme coordination costs are covered by the overall revenue funding budget through the Integrated Settlement.

## 16. What is the interaction between the Retrofit Pilot, Net Zero Neighbourhoods and the Local Net Zero Accelerator programme?

The Retrofit Pilot is designed to actively support, contribute to and benefit from our other regional programmes, such as Net Zero Neighbourhoods and the Local Net Zero Accelerator.

Net Zero Neighbourhoods in the West Midlands have focused on a holistic approach to neighbourhood-scale transitions. The key pillars are retrofit, low carbon travel, green space interventions and local, low carbon electricity generation. At the centre of these pillars is a deep focus on co-production, empowering citizens through co-design to create a vision for their very own Net Zero Neighbourhood. There are currently seven Net Zero Neighbourhoods being delivered across the seven Local Authorities within the West Midlands.

We hope that Local Authorities, in collaboration with communities across their local area, will create new Net Zero Neighbourhoods, as well as continuing to develop their existing ones, through the Devolved Retrofit Pilot. This approach for holistic, community-



driven, place-based transitions should align particularly well with the wider aims of the Pilot for a more flexible, area-based, cross tenure and outcomes-driven approach to retrofit.

As Net Zero Neighbourhoods become more developed and prevalent, private financing should be brought in to grow the scope and scale of these activities and move away from wholly grant-funded projects. The Local Net Zero Accelerator (LNZA) programme is looking to develop a regional Net Zero Fund for blending public and private investment to leverage additional capital into net zero outcomes, including retrofit. This will look to leverage concessional finance from outcomes buying, returns seeking and philanthropic investors into projects like Net Zero Neighbourhoods and wider net zero projects.

As the Retrofit Pilot is seeking to evidence and affect wider outcomes through holistic retrofit, as well as decarbonisation and fuel poverty alleviation, additional financing and alternative sources of funding should be brought in to grow the impact and depth of public funding into retrofit. We hoped that LNZA will be used as a mechanism for leveraging private financing into the Pilot and increasing the scale of devolution's impact on West Midlands retrofitting. LNZA will look to operationalise the Net Zero Fund in two years (2027/2028).

## 17. How will Monitoring and Evaluation (M&E) work and how will data be captured and stored for the Retrofit Pilot?

All projects are expected to report through a designated data management system, and likely report on a monthly basis. The scheme guidance will set out the full list of data monitoring and reporting requirements—we will look to publish this in January 2025. However, we expect that project will report on a minimum quarterly basis, but that we may require monthly reporting during the project development phase.

We would expect that project teams participate in monitoring meetings at least once per month, regardless of the frequency of formal reports.

The reporting requirements are being reviewed and streamlined with DESNZ to align with the Outcomes Framework, ensuring that only essential data is collected. Detailed information about monitoring and reporting requirements will be provided when the grant funding is awarded.

The Pilot must, at a minimum, report on monitoring data contributing to the primary scheme outcomes of fuel poverty alleviation and decarbonisation. These will be supplemented by wider monitoring and reporting requirements on the secondary outcomes, which are vital for scheme learning, building the evidence base for local,





cross-tenure and place-based retrofit and testing the Pilot's impact on the retrofit market, real building performance, health and wellbeing and other key outcomes.

In addition, grant recipients will be required to deliver against an agreed baseline and regularly report against a set of KPIs and outcomes. This data will be used to determine progress towards the baseline, determined by the budget, outcomes framework and project proposal. Further details on baselines and KPIs will be published in the scheme guidance in due course.

Data will be collected and stored in a central data management system, which will be compliant with all GDPR, data privacy and handling laws. We will publish information on the nature and functions of this system in due course.

## 18. How will the Pilot be impacted by Local Authority Place-based Strategies and wider local plans?

Each Local Authority has been encouraged and supported in drawing up a Place-Based Strategy (PBS). PBS' set out geography-specific and spatially relevant opportunities for driving investment across a range of themes covered by the integrated settlement.

The PBS draws connections between multiple policy areas to make the case for diverse investment and bring about change at a local level—it blends needs and opportunities across housing, energy, transport, adult skills, local economy, population health and more. Each PBS is a long-term strategy and covers a 20-year period.

As PBS' are not purposed or directed towards any individual funding stream, like the Integrated Settlement, it forms more of an underpinning case for change across local areas. Therefore, as Local Authorities and regional stakeholders engage on their place-based priorities and interrelations between these and other local plans, the Retrofit Pilot and projects within it should be embedded with these wider strategies.

Local Authorities, Housing Associations and Public Sector Organisations are currently being encouraged to bring forward their pipelines of retrofit activities across the West Midlands in preparation for the Pilot. Therefore, individual Place-Based Strategies and local plans should be used to inform these pipelines, and identify opportunities to coordinate investment in a way that delivers greater impact.



## 19. How can community organisations get involved in the Retrofit Pilot?

Whilst community organisations will not be able to apply directly for funding, the WMCA strongly recommends a co-ordinated and community-led approach driven by or facilitated by their relevant Local Authority, Housing Association or Public Sector Body. To encourage this more joined-up, community-led approach to their retrofit pipeline, community organisations are encouraged to contact their relevant Local Authorities and vice versa.

The process for scrutinising proposals made to the Pilot from April 2025 will likely incorporate question to applicants on what their community engagement strategy has been/will be, and how they will ensure communities are consulted and made a central part of the project development process.

## 20. What change control processes will be in place?

Details on the change control process and associated time frames will be set out in scheme guidance, but will follow WMCA's change control process as set out within its Single Assurance Framework (SAF).

## 21. Will PAS 2035/2030:2023 be required for all work carried on homes through the Retrofit Pilot?

Applicants must ensure all work complies with all relevant building and construction product regulations and requirements, particularly those that are considered safety critical, in line with industry best practice. Applicants must also ensure any installations are in line with all concurrent legal requirements for manufacturers to ensure product safety at the time of installation.

All domestic retrofit installations must comply with appropriate safety and construction standards. This includes PAS 2035/2030:2023, with all measures installed by TrustMark-registered and PAS2030:2023-certified contractors for energy performance measures, or MCS-certified contractors for low-carbon heating measures. Sufficient checks must also be in place to ensure that both installers and measures are compliant with these same standards.

We are now in a transition period whereby the 2019 standards will be withdrawn on 30th March 2025 and replaced with the new 2023 standards. Lodgement of works through the TrustMark Retrofit Portal is mandated; applicants should select the "West Midlands Devolved Retrofit Pilot" option from the drop-down menu on the portal.



Applicants must provide details of their contractors, including TrustMark registration, and, where applicable, their Microgeneration Certification Scheme (MCS) certification number.

WMCA reserves the right to make specific and targeted exclusions from following PAS 2035:2023 standards for certain technology installations. This measure aims to support the deployment of low-risk, high-impact retrofit solutions by reducing the costs associated with PAS 2035 compliance, thereby broadening the scope of eligible projects. Exclusions will be implemented only if risks are suitably mitigated, for example, through carrying out environmental sensing and energy monitoring. Any updates on these exclusions will be available in the FAQs and scheme guidance once published.

## 22. What is the expected level of match funding for the Retrofit Pilot?

Match funding will be expected through the three funding schemes being devolved and will likely match that of the national schemes:

**Warm Homes: Social Housing Fund:** Expecting 50% minimum match funding contributions.

**Warm Homes: Local Grant:** no match funding required for owner-occupied homes, private landlords have one fully funded property and 50% minimum contributions thereafter.

**Public Sector Decarbonisation Scheme:** 12% minimum contribution.

## 23. What is the best way to keep up to date with the Pilot?

For direct communication, there is a dedicated inbox where inquiries and feedback can be sent: [Devolved.Retrofit@WMCA.org.uk](mailto:Devolved.Retrofit@WMCA.org.uk). Additionally, the 'Devolved Retrofit Pilot' page on the [WMCA, Energy Capital website](#) will serve as a central hub and will be updated regularly with relevant scheme information, guidance and application forms.

Feedback on the scheme is welcome and we encourage anyone with suggestions or questions to reach out to the above email.