

# Energy Capital Partnership Conference



# Welcome

Cheryl Hiles  
Director – Energy Capital



# Housekeeping



MP\_Conference  
Conference2022@MP

# Rooms



## Ground Floor

- Atrium – Exhibition Space
- Metro, Bridge – Catering

## Level 1

- Platform – Place-based Delivery in Practice session
- Express – Smart Energy Systems Cluster session

## Level 2

- Station – Whole Energy Systems Planning session

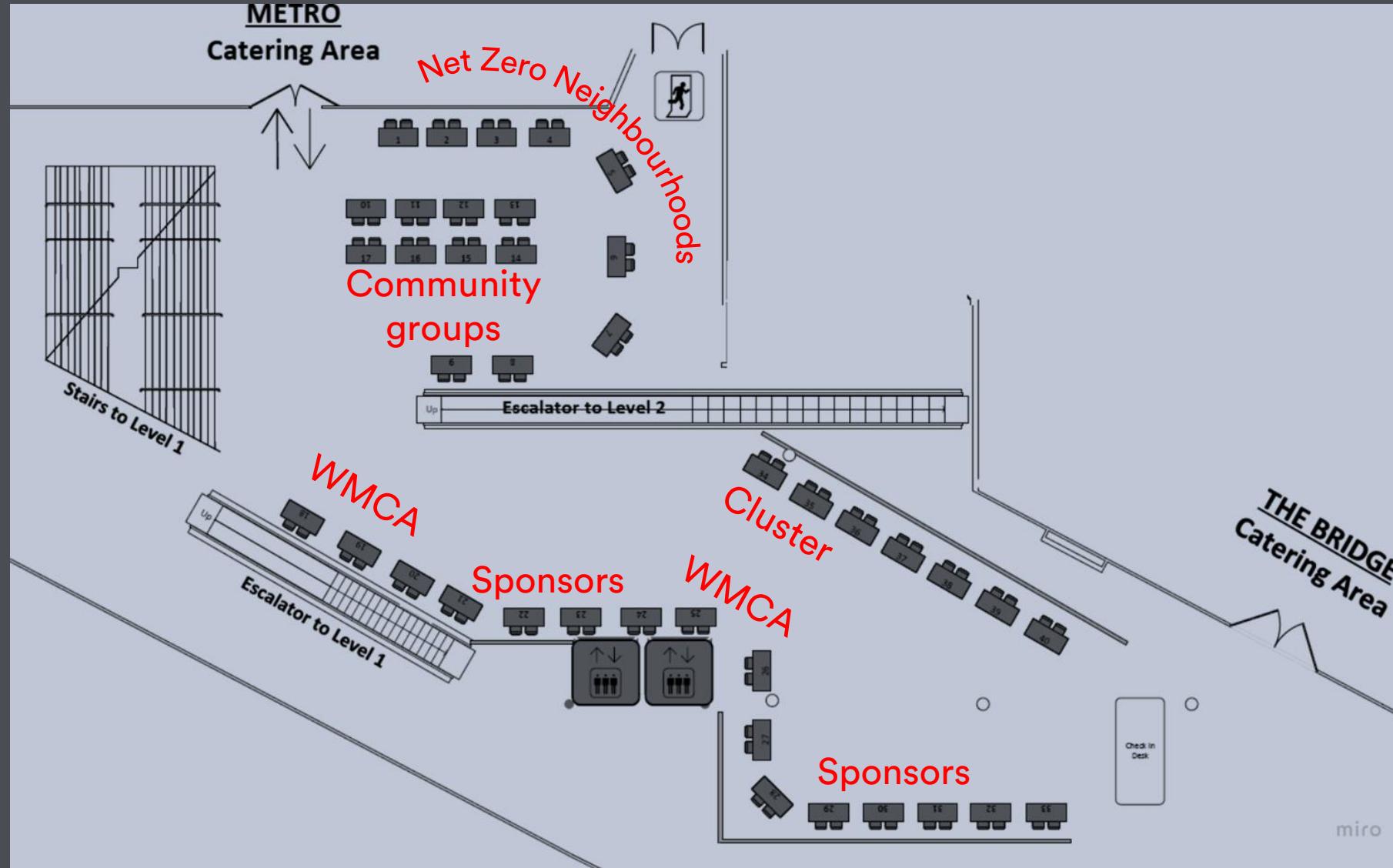
## Level 4

- Auditorium – Plenaries and Retrofit Supply Chain session

# Exhibition Layout



ENERGY  
CAPITAL



# Agenda



ENERGY  
CAPITAL

- 09:30 Welcome
- 10:00 Plenary – People and Place in the Energy Transition
- 11:00 Coffee Break & Exhibition
- 11:30 Plenary – Financing the Energy Transition
- 12:30 Lunch & Exhibition
- 13:45 Parallel sessions
- 15:30 Coffee Break & Exhibition
- 15:50 Plenary – Local Delivery of Net Zero
- 16:30 Exhibition

# Context



ENERGY  
CAPITAL



# Context



Energy Capital's vision is for a just energy transition, where investment is appropriately channelled to meet the needs of our diverse communities, to enable timely decarbonisation and to create a thriving market for clean-tech innovation and economic growth.

# Thank you to our sponsors



ENERGY  
CAPITAL

# Platinum Sponsor

Carl Yale

Regional Refurbishment Director

**LOVELL**  
RENEW

# LOVELL

RENEW

A place for *everyone*



**LOVELL**  
RENEW



Google



# Area based Retrofit

Trusted  
Intermediary



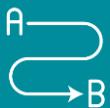
Engagement



Oldest Housing  
Stock in Europe



Procurement



Strategic  
Alignment



Consistent  
Approach –  
Planning &  
Quality



Mix Tenure  
Housing



Funding



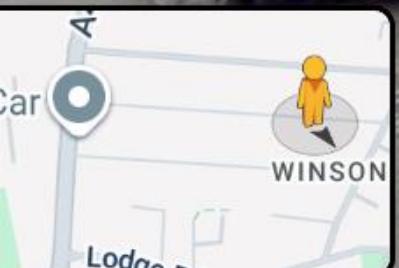
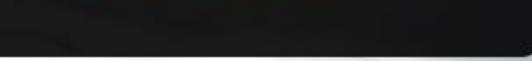
arkby Rd

ngham, England



Google Street View

024 See more dates



Google

Image capture: May 2024

© 2025 Google

United Kingdom

# *the* LOVELL *ways*



We're easy  
to talk to



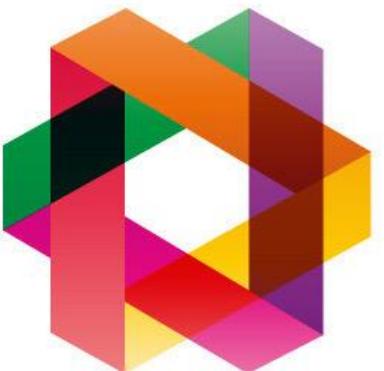
We do the  
right thing



We show  
we care



ACCREDITED  
2025-2028

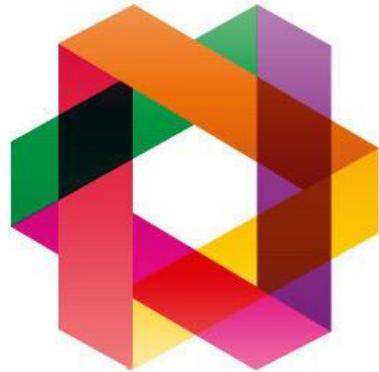


**tpas**

CONTRACTOR



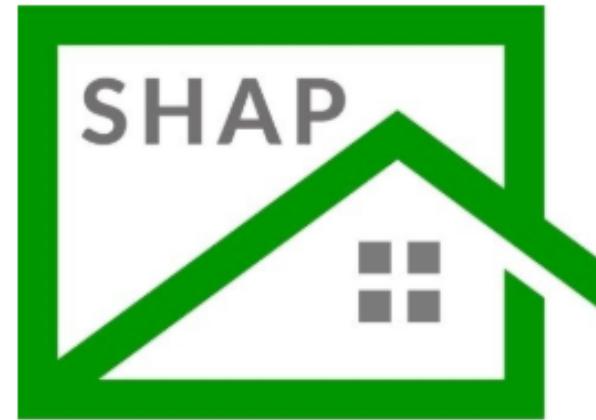
ACCREDITED  
2025-2028



tpas

CONTRACTOR

The 1<sup>st</sup> and only contractor  
to gain TPAS Contractor  
Resident Engagement  
Accreditation under the  
new standards



# Sustainable Housing Action Partnership

- Working for a smart, sustainable national housing infrastructure for 2050 -

LOVELL  
RENEW

PLANNED+



# Procurement



# Procurement



 Panoramas

 Point clouds

Automatic activation

Quality

High quality

[More settings](#) 

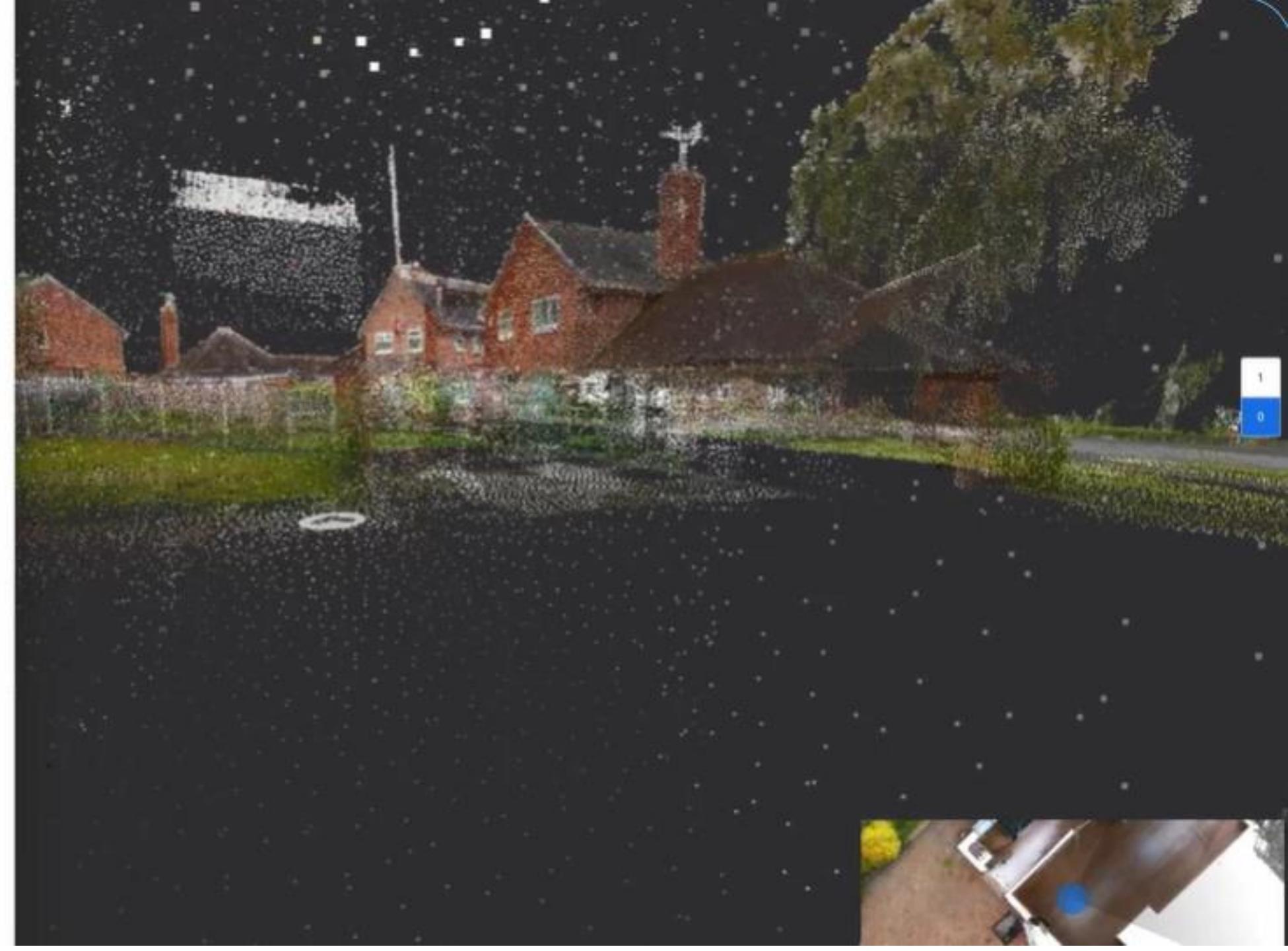
Perspective appearance

Colored

[More settings](#) 

 Location markers

 Secondary view





motorway

## Sell my car. Made simple.

Get a free valuation, the best offer from 7,500+ dealers,  
and free home collection with same-day payment.

ENTER REG

Value your car →

★ Trustpilot ★★★★★ 83,500+ reviews



# Retrofit. Made simple.

Making your home better, safer,  
warmer and healthier.

ENTER ADDRESS

Start your choices →



Trustpilot  83,500+ reviews



# Takeaways

Trust & Risk Management

Community Leadership

Skills Shortages

Funding Complexity

Hope & Transformation



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A place for *everyone*

# People and Place in the Energy Transition

10:00-11:00



# Opening Remarks

Ed Cox

Chief Executive Officer  
(Interim) – WMCA





# Opening Remarks

Ed Cox

Chief Executive Officer  
(Interim) – WMCA



# West Midlands Regional Energy Strategy

February 2025



Mayor of the  
West Midlands

# West Midlands Growth Plan

Growth for Everyone

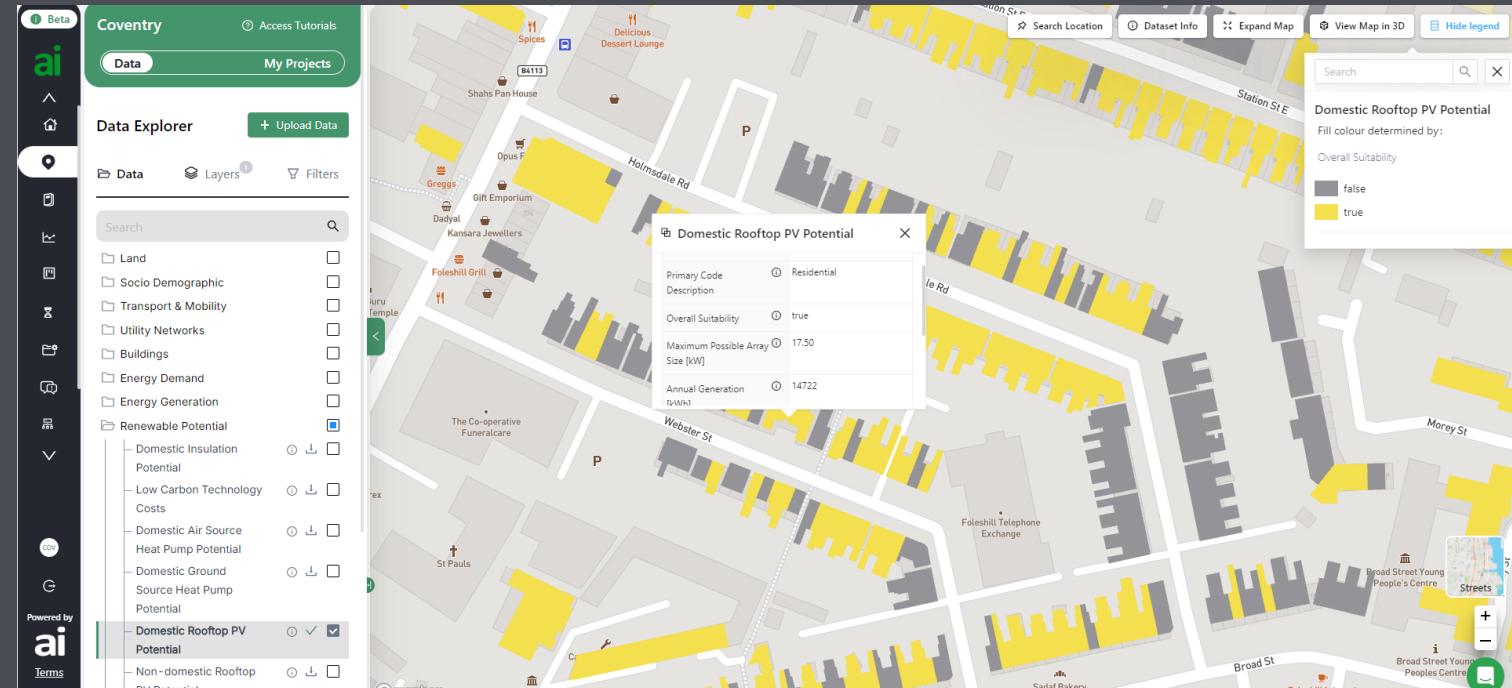
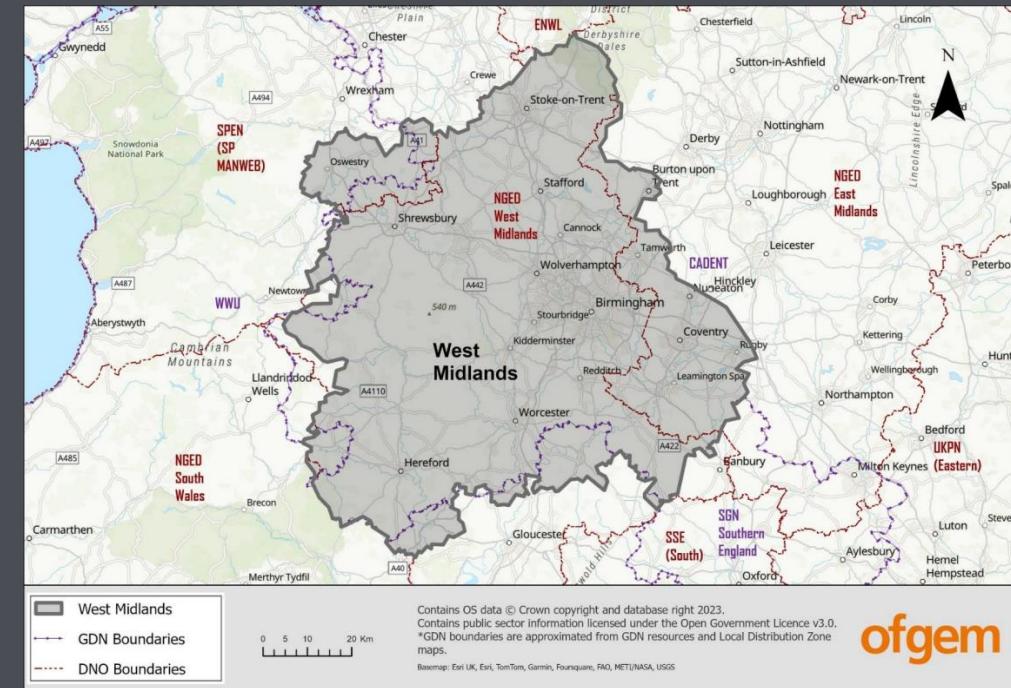


West Midlands  
Combined Authority

# West Midlands Smart Energy Systems Cluster

Putting the Smart  
in Energy Systems







Ministry of Housing,  
Communities &  
Local Government

# English Devolution White Paper

Power and Partnership:  
Foundations for Growth

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December 2024





Net Zero living  
starts here

# Panel: People and Place in the Energy Transition

10:00-11:00



# Panellists



Chair: Ed Cox – WMCA

**Jade Lewis**

Jade Advocacy,  
Energy Capital Board Chair

**Patrick Allcorn**

Department for Energy Security  
and Net Zero

**Guy Newey**

Energy Systems Catapult

**Cathy McClay**

National Grid DSO

# Coffee Break

11:00-11:30



# Panel: Financing the Energy Transition

11:30-12:30



# Panellists



Chair: Cheryl Hiles – Energy Capital

**Rufus Grantham**  
Living Places

**Stuart Leslie**  
National Wealth Fund

**Chris Sood-Nicolls**  
Lloyds

**Becky Lane**  
Furbnow

**Justin Olosunde**  
West of England  
Combined Authority

# Parallel Sessions

Please go directly to  
your allocated sessions  
after lunch

Session	Room	Colour
Collaboration Across the Retrofit Supply Chain	Auditorium	Orange
Whole Energy System Planning	Station	Blue
Place-based Delivery in Practice	Platform	Green
Smart Energy Systems Business Cluster	Express	Yellow

# Lunch & Exhibition

12:30-13:45



# Collaboration Across the Retrofit Supply Chain

13:45-15:30



# Agenda



ENERGY  
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Time	Speaker	Organisation
<b>Collaboration &amp; Social Value</b>		
13:45	Kevin Clarke	Procure Plus
14:00	Chris Chapman	Broadoak Group
14:15	Anam Choudhury	Bangladeshi Women's Association
<b>Collaboration Innovation</b>		
14:30	Tom Woolley	SMS
14:40	Leah Felgate	Daikin
14:50	Warren Knowles	Mixergy
<b>SHAP Retrofit Success Guide</b>		
15:00	Steve Hale	Sustainable Housing Action Partnership
15:15	Q&A	
15:30	Coffee break	

# Collaboration & Social Value

13:45-14:30



**ENERGYCAPITAL**

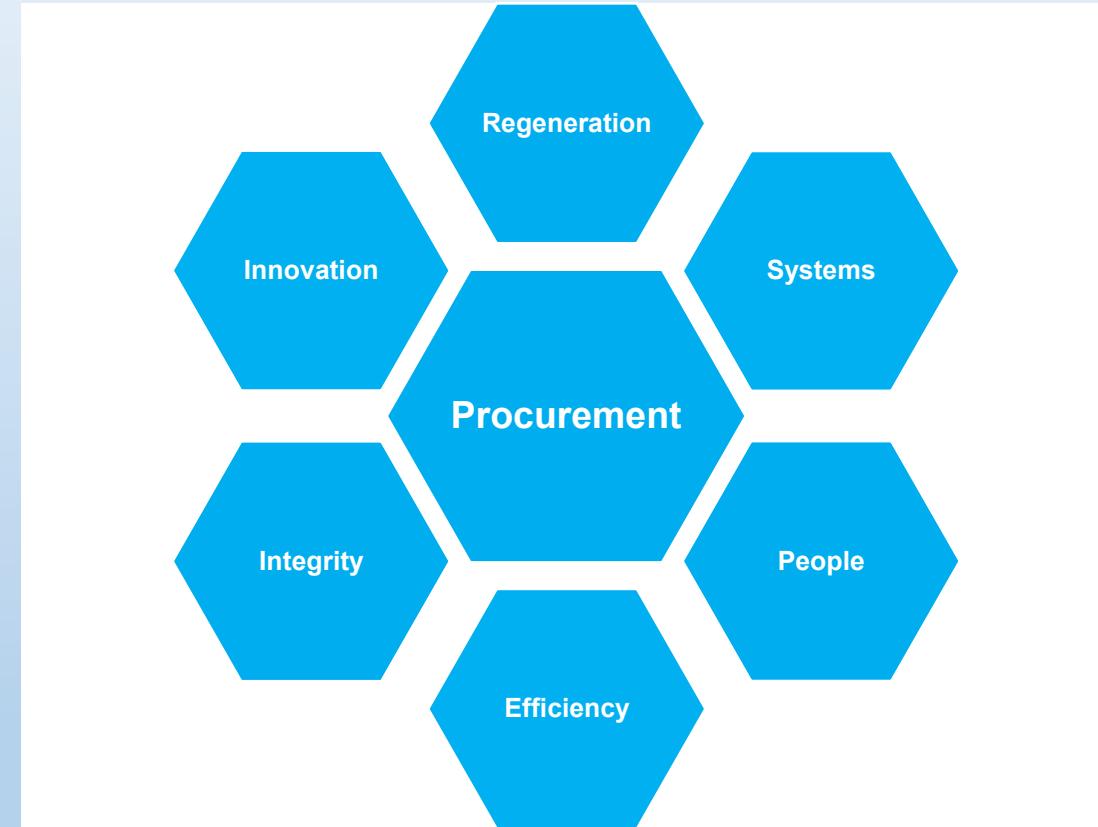


West Midlands  
Combined Authority

# Energy Capital Partnership Autumn Conference

10<sup>th</sup> September 2025

Kevin Clarke  
Senior Account Delivery Manager  
Procure Plus



# Procure Plus and collaboration



- Procure Plus created on the spirit of collaboration :-

- With housing associations.
- With local installers and contractors.
- With material and merchants suppliers.
- With local employment groups.

- All with the same shared goals :-

- Good quality installations at value for money.
- Access to local, sustained work in traditional trades.
- Regular trade and business for suppliers.
- Supporting people into work.



# Examples of collaboration



West Midlands  
Combined Authority



## Standard specifications across all installations

- Uniformity of material suppliers
- Retrofit DPS
- High Rise Building compliance
- Styal Prison and local contractors



Building Safety Act  
2022



# WMCA and retrofit collaboration



- West Midlands standard for retrofit installation specifications.
- West Midlands standard schedule of amendments for construction contracts.
- Communication Events.
- Collaborative procurement of retrofit support.
- Midlands Lot of SMEs on LZCT framework in November 2025.
- More than 50 people already supported in to work.
- HUG2 online community of local authorities.



# Legacy



West Midlands  
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- Devolution proof of concept and regional empowerment.
- 14000 homes improved. Lives changed.
- Local jobs and apprenticeships.
- Economic stimulation of communities.





# BROAD OAK GROUP

# WHO ARE BROAD OAK GROUP?

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!



# WHAT CHALLENGES IS THE GREEN SKILLS SECTOR FACING?

## Oversubscription of SHF & Local Grant Schemes

- SHDF Wave 3 saw applications exceeding available funding by over 200%.
- High demand means limited delivery capacity due to supply chain constraints.

## Competition with ECO 4 / Other Funding Initiatives

- ECO 4 demands similar resources, further stretching the skilled workforce.
- Funding competition affects recruitment and material supply.

## Skills Shortage in Retrofit & Renewables

- Current Air Source Heat Pump engineers: 3,000 – 4,000 (~5% of the plumbing & heating workforce).
- Target for 2028: 27,000+ engineers needed → 4,000-6,000 new engineers per year.
- Lack of PAS 2035-qualified Retrofit Coordinators, Assessors & Installers.

## Diluted Quality

- Multi-tier contracting risks quality through poor oversight & control.
- TrustMark failure rate for some suppliers: 86%

# 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

## DIRECT EMPLOYED WORK FORCE BENEFITS

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

## HELPING SME'S GROW

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

We're Proud to Have:  
Managers from Trade Backgrounds

# TIER 1 CONTRACTOR

WHAT DOES THIS ACTUALLY MEAN?

## SERVICES PROVIDED

- Full project delivery service
- Resource and experience to handle complexity
- Full CDM compliance with client-side management
- Specialist retrofit contractor
  - Project & Site management
  - RLO/ TLO
  - Project delivery admin team
  - Retrofit assessment, design & coordination
  - Sub-contract management

We're proud to offer:

Broad Oak's own employees  
Client risk management  
Reduced mobilisation times



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



## **Net Zero Neighbourhood**

### **Park Estate – Sandwell**



### **Community Engagement**

**October 2024 - August 2025**



Community Engagement has been about listening, building trust, and laying the groundwork for meaningful change. An initial £15K grant enabled BWA to lead on the engagement of residents within the Park Lane estate supporting capacity building of residents, developing community champions, and supporting the codesign.

# Net Zero Community Engagement Journey

Net Zero Workforce Development	Marketing, Comms and Events	Net Zero Neighbourhood Forum	Community Engagement Activities	Community Led Climate Action Projects	Net Zero Community Survey	Retrofit Assessment RA
Community Engagement commenced with the appointment of a part-time Community Engagement Officer, who assembled a team of 15 volunteers to support the delivery of community engagement activities and advocate for the net zero agenda among local residents.	Developed a marketing and events plan, created net zero materials, and shared messages via social media (3649+ Views) and community platforms. Delivered regular outreach and holiday events and supported Net Zero Partners in engaging with the Park Estate community.	Forum members collaborated to codesign net zero interventions and engagement activities, connected with neighbours sharing similar interests, identified funding sources, and supported project branding and promotion. Supported NZNG with the design of EcoForce Alliance Project aimed to secure Climate Action Fund valued at £1.3M.	Delivered 33 workshops, 4 major events, and 24 networking sessions covering topics like climate cafés, swap shops, art, cooking, and ESOL. Engagement Team built strong community connections by meeting people in their own language, culture, and daily life. 300+ individual successfully engaged.	Three community groups received £1500 to run environmental activities including pollution and climate change discussions, health surveys, creative projects, events, and a youth campaign, all aimed at raising sustainability awareness and encouraging participation. Participants included 25 Women, 12 Girls and 15 Boys.	The survey engaged 137 households to assess knowledge and attitudes toward Net Zero. Finding: 60% were unfamiliar with the term, 87% were open to making changes for cost, health, and environmental reasons, though financial, language, and housing issues posed challenges. 77 households signed up for the Free Home Energy Check	Additional staff assigned to support the RA Customer Journey. Assessments have been completed for 44 identified households, with a target of reaching 50 by September. Measures such as external wall insulation, new doors, windows, and potential incentives may contribute to increased participation from additional households.



Outcomes & Value	Lessons Learnt	Evaluation
<p>With an initial investment of £15,000 for community engagement, we reached hundreds of residents, sparked creative learning, and built a strong foundation for sustainable development.</p> <p>“Women and Youth-led media amplified our reach, and trusted relationships deepened our impact. This wasn’t just value for money; it was value for community.”</p>	<p>We have learned that reflection time matters. That vulnerable households need continued support. That women and youth-led formats work and that trusted community organisations such as the Bangladeshi Women’s Associations are essential.</p> <p>Future development of this community engagement work will build on these lessons, with even more collaboration, creativity, and care.</p>	<p>Community Engagement proves small investments can spark transformation.</p> <p>Independent Evaluation has identified that community engagement has provided an excellent platform for the future development of the Net Zero Neighbourhood Project through its extensive engagement and educational aspects, particularly making relevant to local people the importance of environmental issues and the differences they can make for both the planet and also their own homes.</p>

# Collaboration Innovation

14:30-15:00





**Fully *Funded* Low  
Carbon Tech Retrofit**

# ***SMS, at the heart of the UK energy market for 30 years.***

**2019**

SMS acquires Solo Energy. Virtual power plant with the grid flexibility platform FlexiGrid.

**2022**

SMS acquires n3rgy – to unlock energy data from smart meters, managing privacy, consent and feeding the energy transition.

**2024**

A redesign of Solo Power with the launch of Metis. Full end to end energy transition capability, founded on data and consumer education.

**2025**

Metis capability complete and proven, platform and brand live and scaling across Oxfordshire in 1st of its kind trial.

**2022**

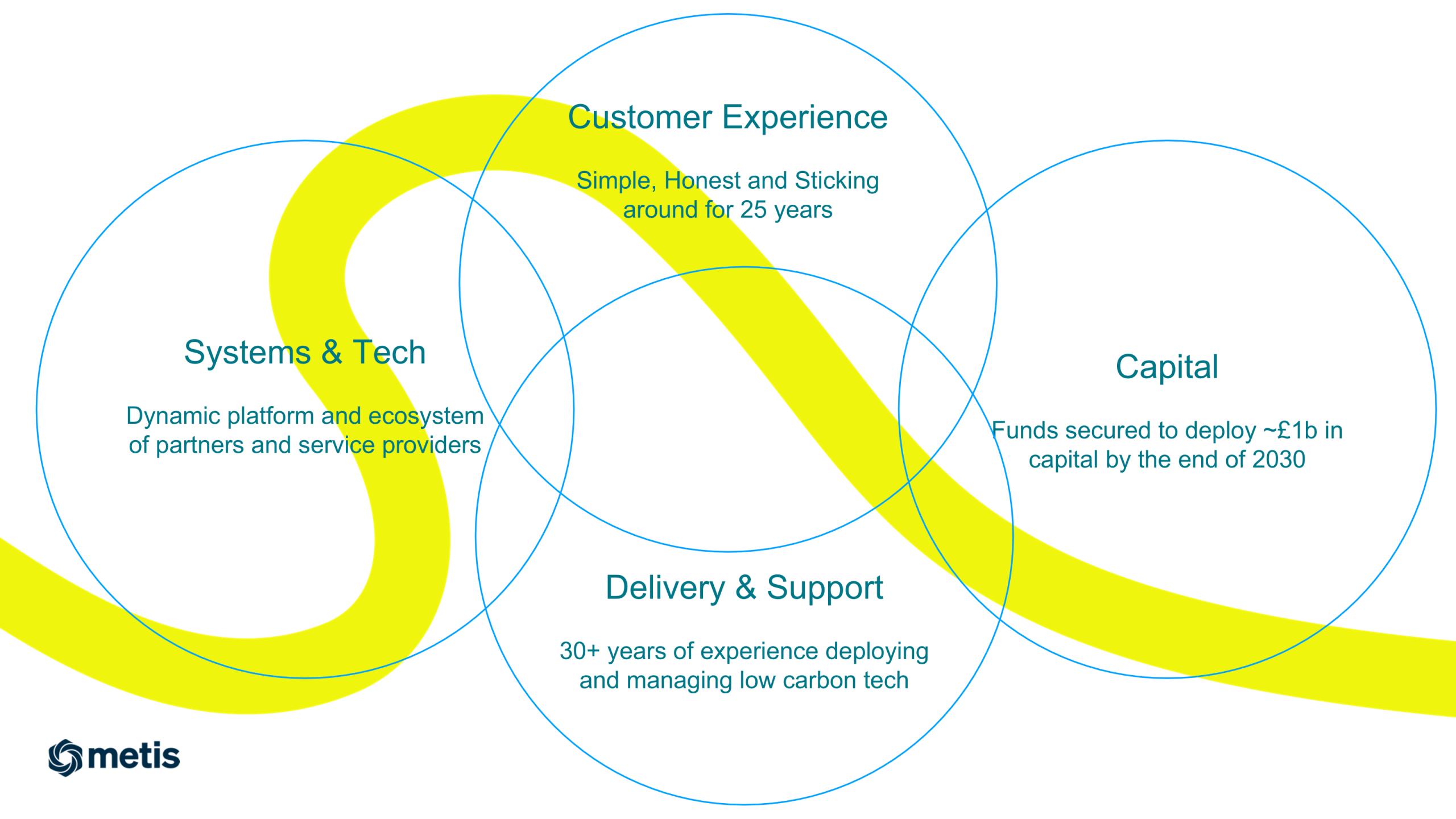
Solo Power launched into housing associations, fully funded solar and storage.

**2023**

Consumer and industry research on the challenges facing the energy transition, home owner, social landlords, tenants and businesses.

**2024**

SMS acquired by KKR, unlocking our ability to scale.



# Why's it hard, Why Metis?

## Lack of Interest, trust, understanding, money, support, simplicity

Developed & Learnt from Solo Power

Looked at funding other models

This experience and research led to the creation of Metis

We've the ability to be patient and then scale

Backing ourselves that this is an area private capital can be deployed

## How Metis was developed to address these challenges -

- Solutions based business in control of the full value chain for 25 years
- Addresses consumer engagement and trust with data led, honest calculations on the benefits driving consumers "buy-in"
- Metis and SMS control over governance and subcontractors
- Stays Energy Supplier Agnostic - delivers net savings of ~25%
- Market leading digital tools with the Metis platform and its Ecosystem of partners create a seamless and highly effective customer journey

# 5 Simple Stages

Metis supports every step of the energy transition journey and how we address industries challenges

**1**

Making sense of the energy data. Driving engagement and education.



**2**

Assessing your energy transition options. Uniquely honest simulation of a low carbon tech retrofit modelled against a competitive energy market.



**3**

Make it affordable! Flexible financial models to create win-win scenarios.



**4**

National high-quality workforce to survey, support install and support controlled by SMS's industry leading compliance and H&S teams.



**5**

Ongoing asset management & optimisation. Home energy management consumer apps and portfolio dashboards. Remaining energy supplier agnostic.

- ✓ Off Balance Sheet – Fully or Partly funded
- ✓ No Air Space Lease
- ✓ Optimisation and O&M Included
- ✓ Consumer Engagement – Honest & Data Led Savings
- ✓ Simple Fixed, Known Monthly Costs – No more complex than a mobile phone subscription
- ✓ Win-Win Commercial Model for Landlord/LA and Consumers

- ✓ Asset Replacement and Service in line with PV lifetime
- ✓ Consumers still in the Domestic Energy Market
- ✓ Protected by Price Cap, Eligible for Grants, 5% VAT on Grid supplied Energy
- ✓ Energy Supplier Agnostic
- ✓ Metis controls the full value chain
- ✓ Grid Flexibility Revenue is upside – not critical source of revenue

# Indicative *Financial Flow*

Example 8 panel and 5.2kwh System	Impact
Tenant	
Energy Bill Cost	85% Lower
Energy as a Service Cost	£53 (per month)
Net Energy Savings	25% Lower
Landlord (Per Anum)	
Export Revenue	£65
Flexibility Revenue	£140
Energy as a Service Revenue	£636
Total Revenue	£841
Cost to Metis	£627
Total Impact on Landlord	£214

## Creating win-win solutions

**Tailored portfolio calculations provided as part of the customer journey. Bespoke Customer Journey based on the Tenants historical data, with honest, clear and conversative expected savings**

- Tenant keeps a personal Energy bill, recommended and switched to the best in the market by Metis
- Keeps a domestic energy account. 5% VAT, Price Cap, Benefits, any dual fuel discount. Switched by Metis to best tariff on market
- Tenant gets 100% of generation and optimisation to tariff (Arbitrage) value)
- Tenant Energy Bill reduced by ~85%
- Tenant pays landlord a fixed monthly home comfort charge
- Metis collects Export and Grid Flexibility Revenue and passes 100% to Landlord
- Tenant expected to see Net Annual Savings of 25% compared to their previous bill (not compared to national price cap)
- Landlord makes net profit, which is used as required by Landlord

# Case Study: Oxfordshire County Council

1



## Launched the Energy Saver App

Metis and Oxfordshire County Council successfully launched the Energy Saver App

Free energy insights app using smart meter data via n3rgy. Established engagement, trust and natural behaviour led savings

App developed and white labelled by Eliq. Marketing funded by government and executed by OCC

→ 9% reduction in energy usage



2

## Metis calculated savings for PV & Battery

Metis platform consumes HH Data, information about the house and existing tariff detail to simulate the impact of PV and Battery for the consumer  
→ Honest, MCS and Ofgem Code savings

Consumers can understand the impact clearly and book a virtual survey with the Metis team using an in app booking system for a time that works for them

3

## Simple – fixed monthly subscription

In app experience to understand the impact of a Metis led retrofit

Self serve appointment, in app for virtual survey

“As simple as getting a mobile phone”



5



4

## Best in class install

Metis, with its partners, finalise the design, complete onsite survey and arrange scaffolding and full installation

Typically, half a day onsite install, scaffolding removed in the following days

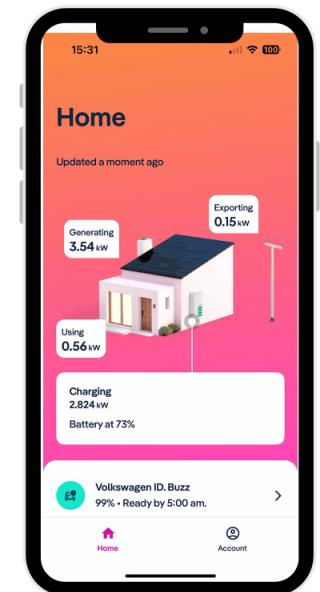
## Ongoing support, app and optimisation

Post install support with SEG application, tariff monitoring

### Metis Home Energy Management App

Residents use a simple app that helps them to understand the impact the assets are having

Their assets are optimised automatically around how the resident wants to run their home (e.g. charging an EV overnight), maximising savings and flexibility revenue.



# Oxford – the statistics

**Over  
9,600**

app downloads in 9 months,  
connecting smart meters and  
gaining energy insights

**75%**

Of users spend more than 5  
minutes a week in the app

**65%**

Overall conversion rate from  
seeing proposition to installation

**£375**

Average annual savings after  
monthly charge applied

**266**

Completed installations

**303**

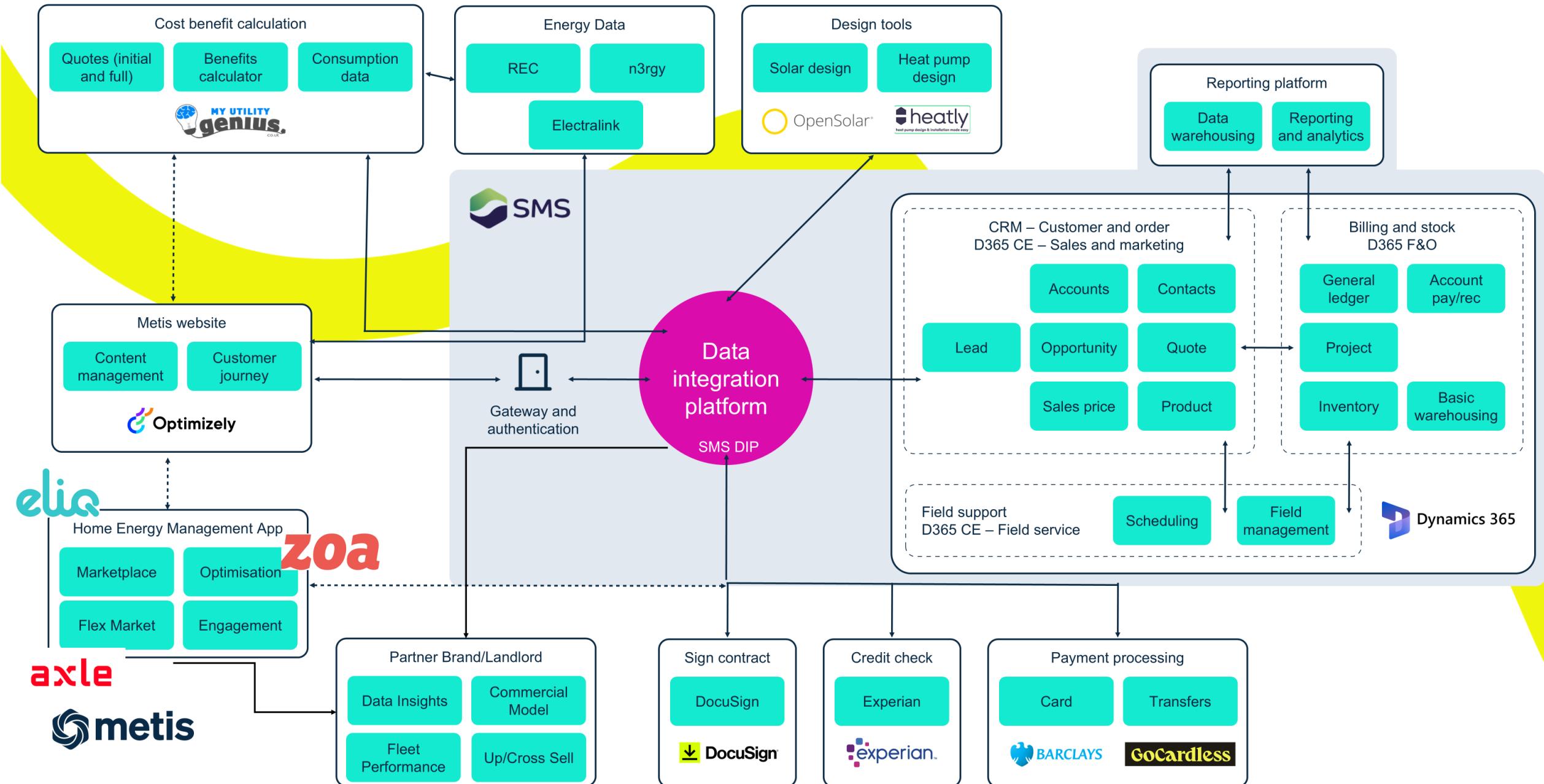
Contracted customers

**>150mwh**

Generation to date  
from installed PV

# Solution design and data workflow

High quality, modularised partners and integration, with one seamless customer journey



# Get in touch today and unlock solutions for your portfolio

[Sales@metis.co.uk](mailto:Sales@metis.co.uk)



Metis Energy Ltd is a wholly owned subsidiary of SMS Energy Ltd, an energy services and asset provider for 30 years

Collaboration across the  
retrofit supply chain  
Energy Capital conference  
10<sup>th</sup> September 2025



# Introduction to Daikin

- Daikin Europe NV & part of Daikin Industries, headquartered in Japan, Worldwide T/O \$24Billion
- UK Manufacturing facilities in Belgium, Germany & Poland
- UK warehouses Kent & Manchester, Daventry
- Europe's number one player in the HVAC market



# Supply chain, training and show rooms in the Midlands

Daikin Sustainable Home network across the Midlands

- Bell Plumbing Supplies- Worcester & Stourbridge
- Farr & Harris- Shrewsbury
- Jones & Shuffs- Stoke on Trent

- Renewable Energy Warehouse in Stirchley, Birmingham B30
- Daikin heating hub and training centre also in Birmingham



# Innovation project case study- air to air heat pumps

Daikin supplied air to air heat pumps to a sheltered housing scheme in Hinckley, to replace an old inefficient communal system

- 60 Daikin multi Split outdoor units and 129 indoor units for heating and cooling
- Projected annual carbon reduction 43.4 tonnes of CO<sub>2</sub>e
- Significantly enhanced resident comfort and lower individually controlled energy bills



<https://www.robertheath.co.uk/armada-court-case-study>

43.4 tCO<sub>2</sub>e   
Annual Carbon Reduction

Achieved at Armada Court: Transforming a sheltered housing scheme with Air Source Heat Pumps for sustainable comfort.



Equivalent to:  
Carbon absorbed by  
over 2350 mature trees  
annually.



Equivalent to:  
Offsetting the annual  
heating emissions of over  
20 average UK homes!



Equivalent to:  
Offsetting 45 London-  
NYC round-trip flights!



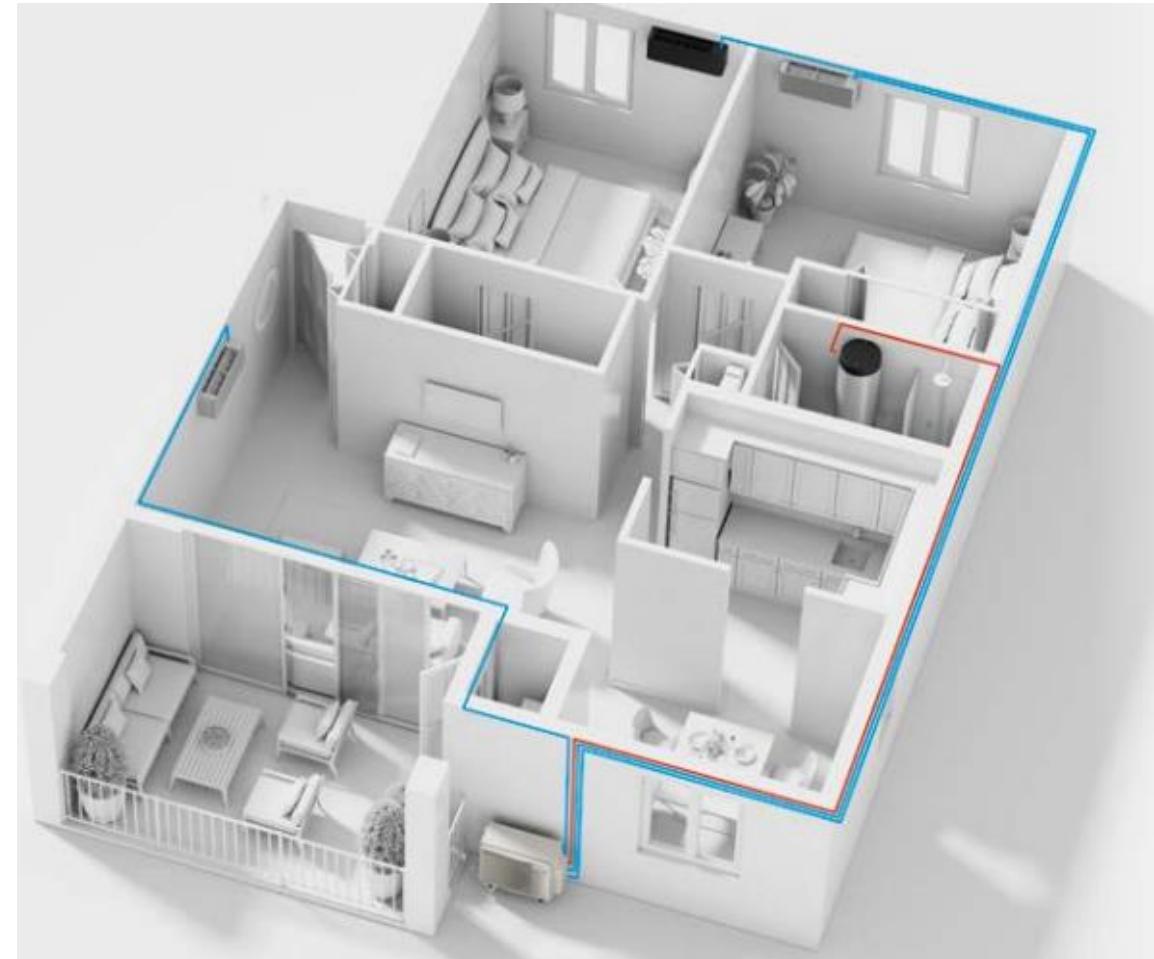
Equivalent to:  
Taking 20 petrol cars  
off the road for a year!



# Innovation product- heating cooling and hot water

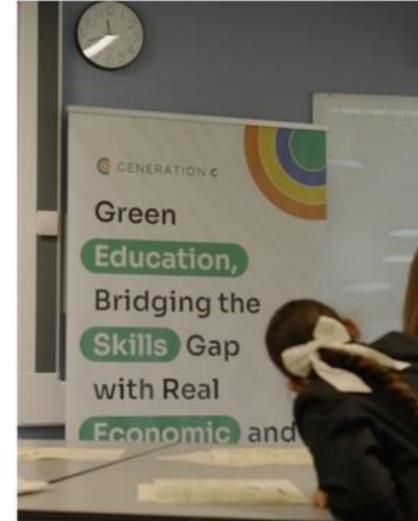
Daikin Multi + air to air heat pump with hot water

- ✓ Solution for smaller properties
- ✓ More efficient solution to storage heaters and direct hot water systems
- ✓ Suitable for vulnerable residents with simple controls
- ✓ Reduce risk of overheating
- ✓ Easy to install and maintain
- ✓ Smaller outdoor unit
- ✓ Less floor/ wall space required compared to traditional heating systems
- ✓ Remote monitoring enabled



# Resident engagement and community projects

- Local events in the community
- Assist with resident home visits/ surveys
- Easy to use guidance
- Training and support for all key stakeholders
- Support local colleges and schools



## Inspiring green careers

Daikin UK and Generation C are joining forces to inspire the green careers of tomorrow.



# Thank you





HOT WATER IS AT THE CENTRE OF  
ENERGY MANAGEMENT

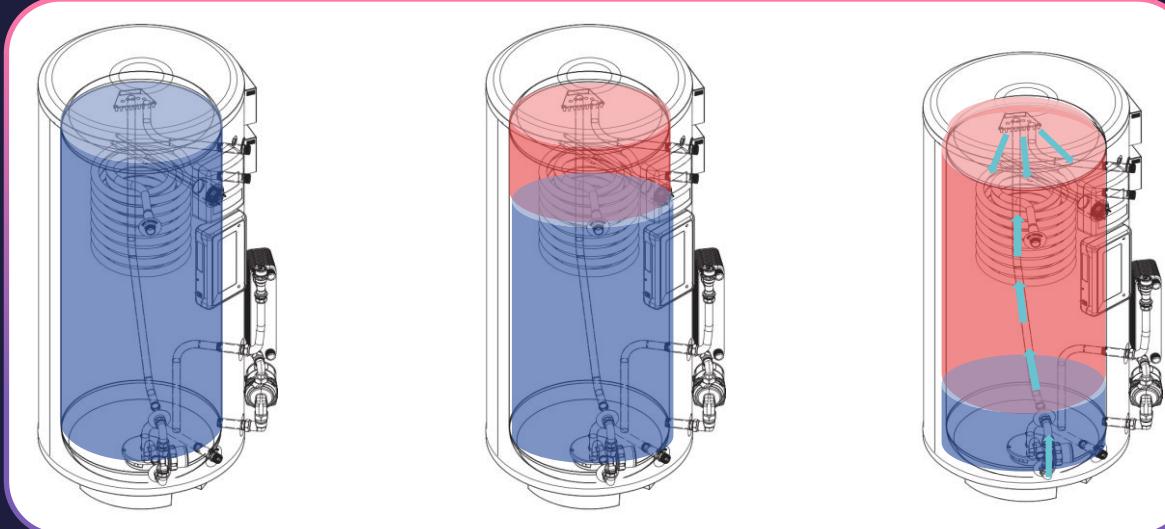
mixergy<sup>®</sup>

MIXERGY TRANSFORMS HOT WATER  
STORAGE INTO AN INTELLIGENT,  
CONNECTED ENERGY ASSET

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# HOW WE TRANSFORM HOT WATER



TRADITIONAL HOT  
WATER STORAGE

## Patented Top-down Heating

Heats only what you need, up to 40% more efficient than traditional tanks.

## Precision-Level Sensing

Our sensor sees exactly where hot water is. No guessing. No waste.

## Grid-Ready Intelligence

Supports demand shifting, smart tariffs, and dynamic scheduling.

## Smart, Modular Controls

Built-in flexibility for any heat source-gas, electric, solar, or heat pump.

# DESIGNED TO SAVE ENERGY



## Lower Bills by Design

We reduce hot water bills—saving up to 60% when paired with solar PV and Octopus Agile.

## Cut Carbon, Not Comfort

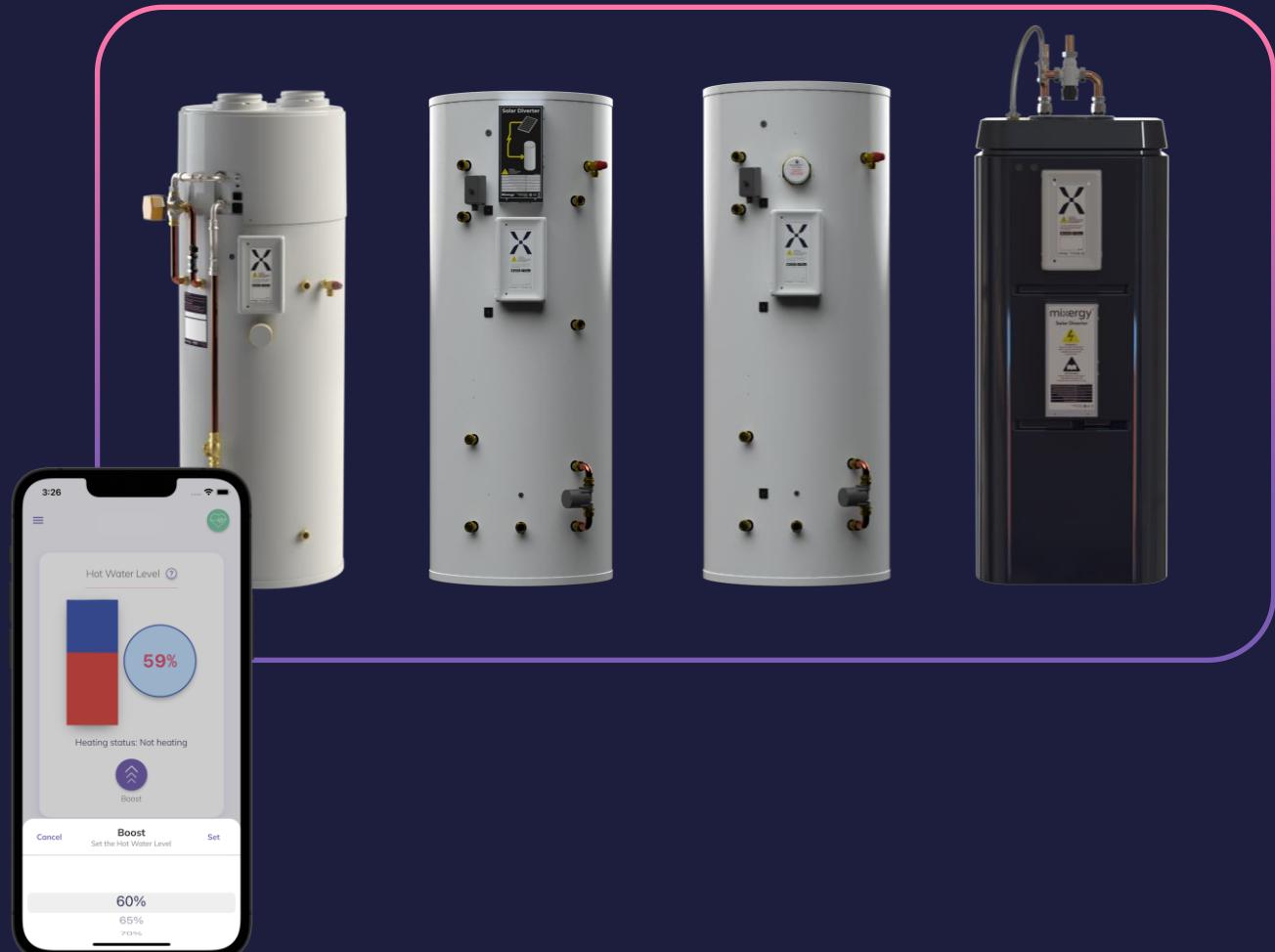
Uses less energy while enabling smart load shifting, reducing building carbon emissions without compromising performance.

## Smarter Compliance

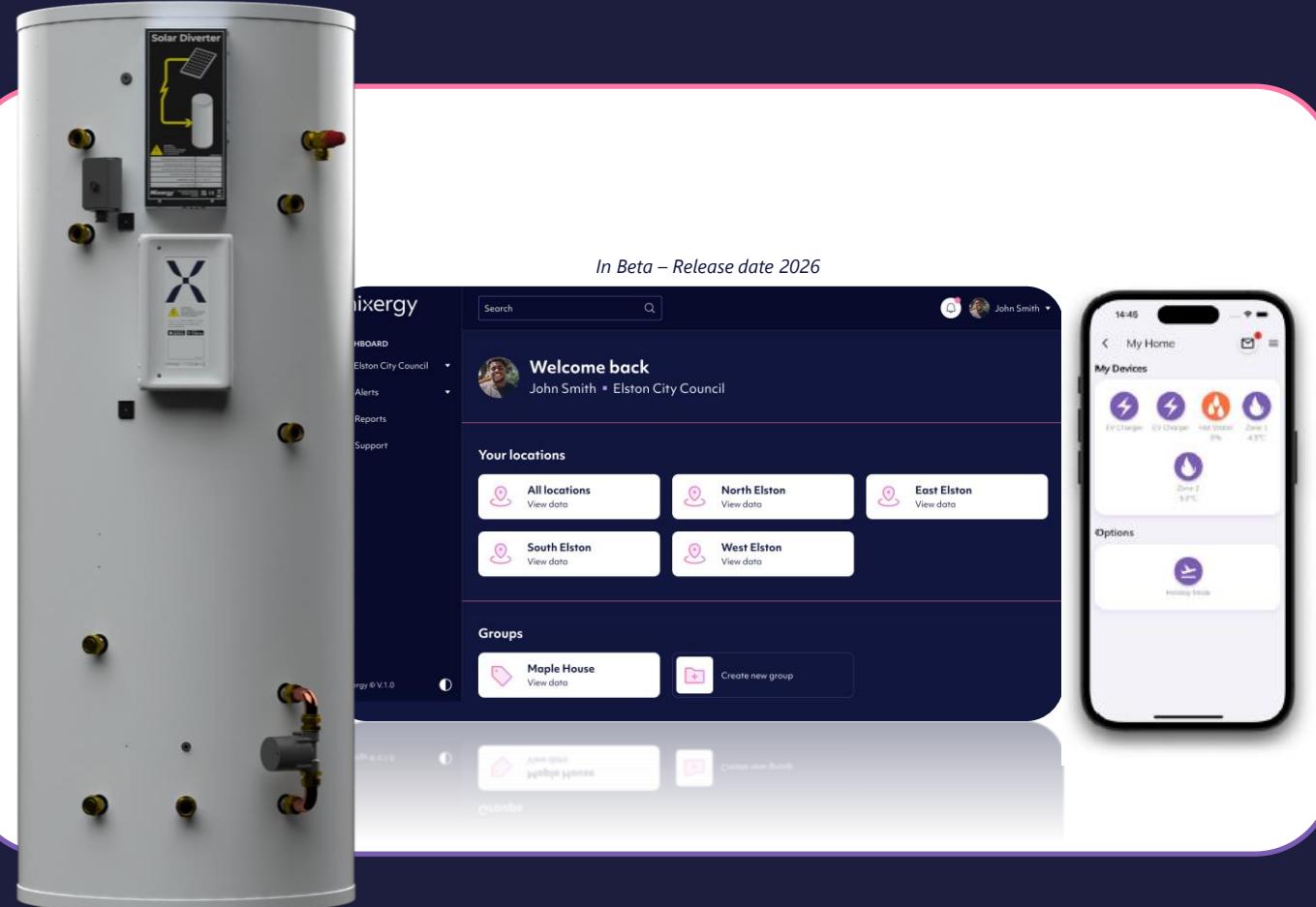
Our SAP-optimised tech improves ratings and helps boost EPC scores, reducing the need for additional solar.

## Built for Net Zero

We're #1 in our product category and already recognised in the Home Energy Model.



# TRANSFORMING HOT WATER FLEET & HOME MANAGEMENT



## Connected Hot Water Control

Optimises heating using smart sensors and real-time tariffs.

## Integrated Tariff Engine

Shifts usage to cheaper times to cut running costs.

Coming soon...

## Smart Zone & Ventilation Control

Controls heating and airflow room by room for comfort and air quality.

## Whole-Home Energy Monitoring

Tracks energy use across the home to drive efficiency.



# BIG SAVINGS, BIGGER IMPACT

## HAVEBURY HOUSING



185 days without oil

3x lower carbon emissions

837 kWh of free solar energy used

## BIRMINGHAM CITY COUNCIL



325,587 kWh saved

£286,000/year saved

172 tons CO<sub>2</sub> cut

## BARCUD HOUSING



£19 a week saving

30% reduction in hot water bills

10x faster hot water heating

## LEARN MORE



Data and savings are accurate at the time of each case study, based on the price cap in effect then. Hot water consumption figures come from the Mixergy iO platform. See individual case studies for supporting evidence.



# MIXERGY HAS TRANSFORMED HOT WATER STORAGE

## CONNECT

Warren Knowles, Business Development Manager

[Warren.Knowles@mixergy.co.uk](mailto:Warren.Knowles@mixergy.co.uk)

07385 474115



**mixergy**<sup>®</sup>

# SHAP Retrofit Success Guide

15:00-15:15



# Retrofit Success Guides

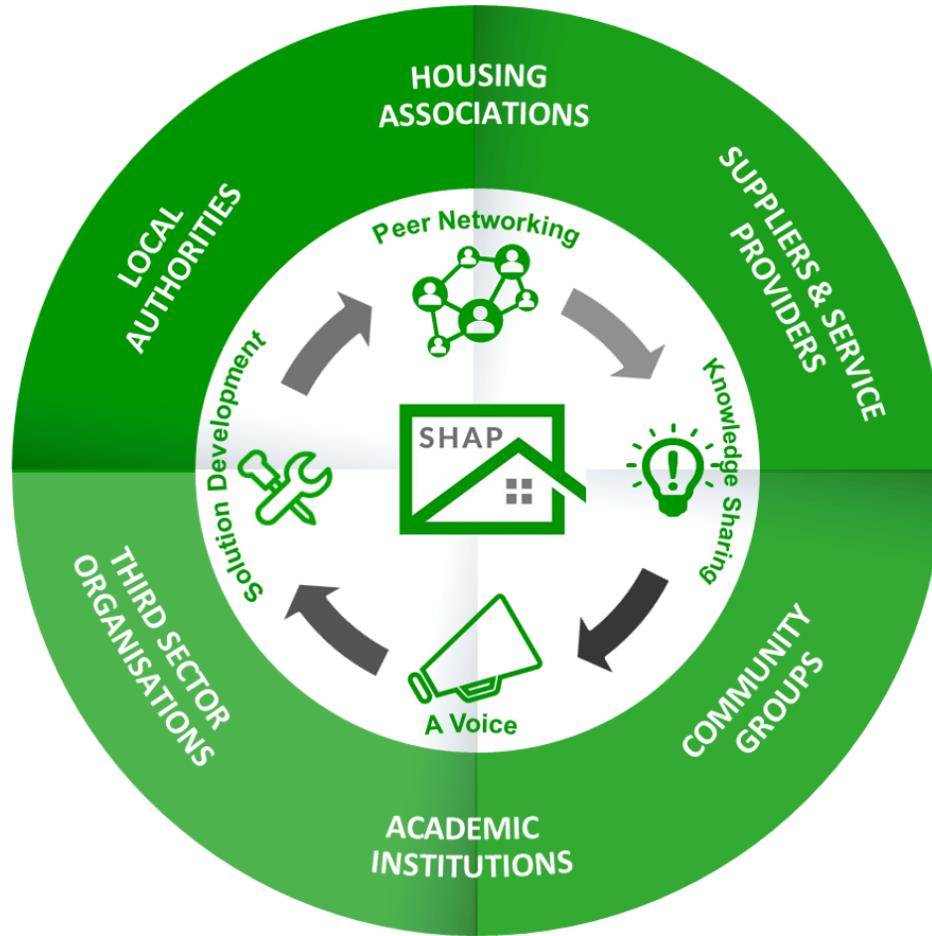
Energy Capital - Autumn Conference

10.09.25



**LOVELL**

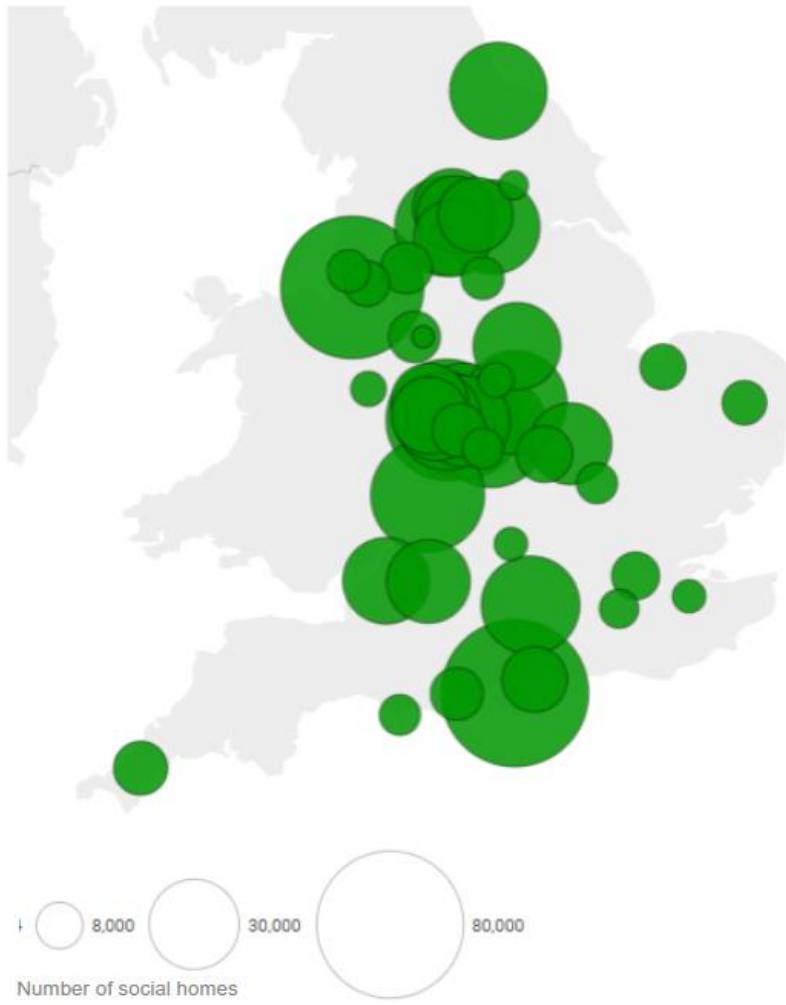
# Sustainable Housing Action Partnership (SHAP)



-  **PEER NETWORKING**
-  **KNOWLEDGE DISSEMINATION**
-  **A VOICE**
-  **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



Gemma Brookes  
Orbit



Gordon Watts  
Energy Saving Trust



Gemma Voaden  
Together Housing



Monica Mateo-Garcia  
Birmingham City  
University



Peter Harte  
Turner & Townsend

# Rethinking Retrofit: Transforming Retrofit Delivery Through Devolution

- Retrofit programmes continue to face recurring challenges

**30,000 homes fitted with botched insulation under government schemes, ministers admit**



Government finds 'systemic failure' with solid wall insulation fitted under official schemes – here's updated info if your home's affected



# Rethinking Retrofit: Transforming Retrofit Delivery Through Devolution

- There are resources available to tackle this but SHAP's network called for more practical guidance rooted in real world experience
- Earlier this year, SHAP held a series of workshops to gather perspectives from across the sector on the **issues, underlying causes, solutions, and opportunities for innovation before, during, and after retrofit delivery.**



# Rethinking Retrofit: Transforming Retrofit Delivery Through Devolution

- Approx 100 contributors representing 70 organisations have been a part of this work

**energy  
saving  
trust**



**Amplius**



**together  
housing**



**lendology.cic**

**JRHT** JOSEPH  
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**LOVELL**



**Sanctuary  
Housing**



**InstaGroup**

**Westdale**



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**West Midlands  
Combined Authority**



**Wates**

**SOLAR CITY  
smart generation**



**NOVUS  
Property Solutions**

**The Wrekin  
Housing Group**



**EQUANS**



**DESIGNSPECIFICS  
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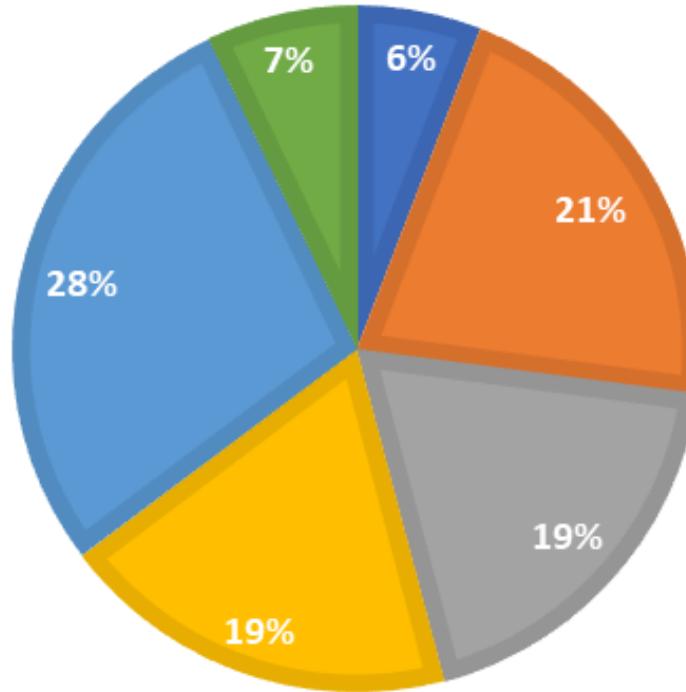
**BRIGHTER  
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Unlock your organisation's potential

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GROUP**

**surefire**

**LIVERPOOL  
CITY REGION  
COMBINED AUTHORITY**

## Actors/Sector Representation



■ Academic

■ Local/Combined Authority

■ Third Sector

■ Contractor/Supplier/Manufacturer

■ Housing Associations

■ Consultancy

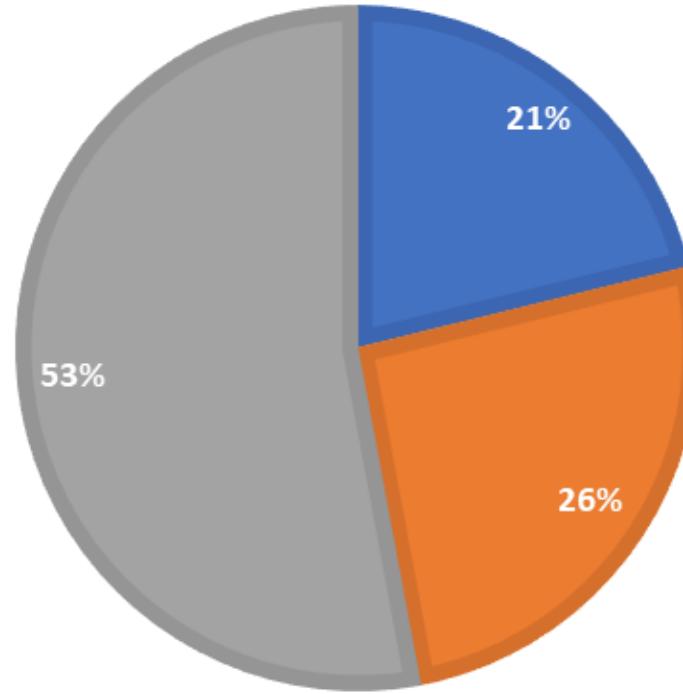
 **EQUANS**

  
West Midlands  
Combined Authority



**LOVELL**

## Roles/Seniority Representation



■ Operational ■ Middle Manager ■ Senior Manager



# Feedback

- Over 800 responses were captured across the workshops
- The guidance has been distilled and synthesised into a 'Retrofit Success In Summary' document, accompanied by 8 thematic 'retrofit success' guides:
  - Communicating retrofit effectively
  - Community and resident engagement
  - Data and digitalisation
  - Financing and procurement for retrofit
  - Governing and managing retrofit delivery
  - Retrofit evaluation and improvement
  - Skills and workforce development
  - Strategic planning for area-based retrofit

# Feedback from workshop contributors and reviewers of the drafts has been hugely positive

There's an incredible amount of informative insight here

there was some **excellent detail captured** from the day and a reflection of what is saw and heard in the room

It really is **an excellent document** and helps to focus where we can really move forward with some key actions.

I think the way the insights have been structured around the 'Before', 'During', and 'After' stages is really helpful. It reads clearly and reflects a lot of the real-world challenges and opportunities I've seen in practice.

I think you've done a cracking job of capturing a lot of the points that were made, certainly spot many of mine. I really like the way that this is outlined - and I am looking forward to sharing more widely to internal stakeholders when published

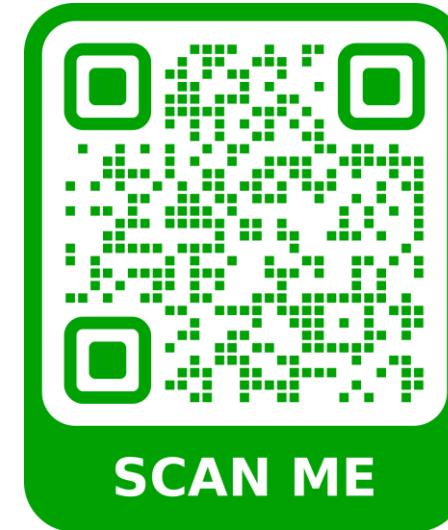
it is a really great piece of work and will offer the sector (and DESNZ!) some true and honest feedback

The workshops were very worthwhile, and I was impressed that there was representation from the fund recipients. I have attended other workshops where there was complete non-attendance by Councils or HAs and therefore the value and outcomes were impacted.

I thought the session was really insightful and the themes captured reflect challenges and opportunities echoed across the sector. It was **encouraging to see alignment between local authorities, contractors and retrofit professionals** around key issues like funding uncertainty, data quality and resident engagement.

## The Guidance

- The Retrofit Success Guides will be disseminated late September/early October
- To access your free copies, keep an eye on:
  - SHAP's LinkedIn page: [linkedin.com/in/shap](https://linkedin.com/in/shap)
  - or website - [www.shap.uk.com](http://www.shap.uk.com)
- We're also building a live repository of 'Retrofit Success' case studies. Get in touch if you want to share yours: [comms@shap.uk.com](mailto:comms@shap.uk.com)



# The Guidance

## COMMUNITY & RESIDENT ENGAGEMENT

### Best practice now:

- Centre retrofit messaging on lived benefits, not technical ambition.
- Involve residents in shaping what success looks like.
- Support residents in adjusting to their upgraded homes - don't assume the job ends at installation.

### How we can be bolder

- Create a shared, cross-sector protocol for dealing with disengagement.
- Mechanisms for resident voice in programme governance.
- Inclusion of resident satisfaction as a delivery performance measure.



# The Guidance

## GOVERNING & MANAGING RETROFIT DELIVERY

### Best practice now:

- Include delivery partners in early programme shaping.
- Coordinate dependencies across workstreams and partners.
- Evaluate governance effectiveness alongside programme outcomes.

### How we can be bolder

- Introduce cross-sector delivery boards with resident voice.
- Create structured escalation protocols that empower delivery teams.
- Formalise continuous improvement loops across programmes.

# The Guidance

## RETROFIT EVALUATION & IMPROVEMENT

### Best practice now:

- Define what 'success' means — beyond technical compliance.
- Involve residents in identifying what should be measured.
- Track early indicators of long-term success.

### How we can be bolder

- Link evaluation to supply chain learning and accountability.
- Develop longitudinal evaluation to track performance over time.
- Open up evaluation data to enable sector-wide learning.

# The Guidance

## SKILLS & WORKFORCE DEVELOPMENT

### Best practice now:

- Engage training providers at the design stage
- Enable contractor feedback to shape future training needs
- Evaluate skills gaps that emerged during delivery

### How we can be bolder

- Mandate local employment and training commitments in procurement
- Make retrofit training flexible, inclusive, and grounded in real-world service needs.
- Create shared delivery hubs that double as training sites

*The West Midlands Combined Authority is proud to be at the forefront of driving change in retrofit delivery through devolved funding and local leadership. The Retrofit Success Guides are an essential resource born from collaboration across the sector and grounded in the practical experience of those delivering retrofit on the ground. They represent a shared commitment to innovation, high standards, and putting residents at the heart of every programme. By leading the transformation of retrofit across the region, we are helping to create warmer, healthier homes that reduce carbon emissions and energy costs, tackle fuel poverty, and deliver lasting, positive outcomes for communities – all essential to achieving our net zero ambitions.*



West Midlands  
Combined Authority

*Equans and Lovell: We recognise that delivering retrofit at scale while meeting the real needs of residents and communities is a challenge the sector must rise to. The Retrofit Success Guides provide clear, practical guidance drawn from deep expertise across the sector, helping to raise standards and foster effective collaboration. As retrofit accelerates, these resources will equip the sector with the insight necessary to navigate complex challenges, ensuring delivery is efficient, effective and always resident-focused. We are united in our commitment to supporting this work, which lays the foundation for lasting, positive impact across communities nationwide. We are proud to support this series and its vital role in shaping the future of retrofit delivery.*

## A Reminder...

- The Retrofit Success Guides will be disseminated late September/early October
- To access your free copies, keep an eye on:
  - SHAP's LinkedIn page: [linkedin.com/in/shap](https://linkedin.com/in/shap)
  - or website - [www.shap.uk.com](http://www.shap.uk.com)
- We're also building a live repository of 'Retrofit Success' case studies. Get in touch if you want to share yours: [comms@shap.uk.com](mailto:comms@shap.uk.com)



# Q&A

15:15-15:30



# Coffee Break

15:30-15:50



# Panel: Local Delivery of Net Zero



15:50-16:30

# Panellists



**Chair: Louise Marix Evans – Quantum Strategy & Technology**

**Perminder Balu**

Wolverhampton City Council

**Tim Fawcett**

Coventry City Council

**Anne Marie Attfield**

Solihull Council

**Ellie Horwitz-Smith**

Birmingham City Council

**INSERT SNAPSHOT OF  
VISUAL MINUTES HERE**

# Upcoming Events



## West Midlands Retrofit Networking Drinks

- Next one: 2<sup>nd</sup> October – Primitivo Bar, Birmingham



## Monthly Collaboration Days

- Next one: 14<sup>th</sup> October – Shoosmiths, Birmingham



Thank you for all  
your contributions