



The Sustainable Housing Action Programme (SHAP) 2005-2006

Final Report for Sustainability West Midlands

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Executive summary

Introduction to SHAP

The aim of the Sustainable Housing Action Programme was to demonstrate how, through the promotion of existing best practice and identification of pathways and decision points particularly in the planning system, high specification energy efficiency and renewable energy measures could be mainstreamed into existing regional housing new build and refurbishment programmes.

The Programme was commissioned in August 2005 by Sustainability West Midlands, in partnership with Energy West Midlands and the Energy Saving Trust, in response to the Sustainability Commentary produced by Sustainability West Midlands on the Regional Housing Strategy.

Key aims and outcomes of the SHAP programme

A series of research projects and events were commissioned as part of the SHAP programme, the aims and outcomes of which are as follows:

Research on National and Regional Energy Efficiency Best Practice – August to October 2005

Identified projects that could be showcased at the Best Practice Case Study event and developed a practical database of projects and resources for housing professionals.

Best Practice Case Study Event – 25 October 2005

Hosted by Advantage West Midlands and Chaired by RegenWM, the event highlighted the drivers and barriers to implementing sustainable energy best practice into housing new build and refurbishment projects.

Research into the provision of advice to Housing Associations and Private Developers and the barriers to incorporating sustainable energy measures in new dwellings – November to January 2006

Conducted by Hestia, the research explored in detail the extent to which advice on best practice is being provided to housing professionals across the region and the barriers to the more widespread implementation of sustainable energy measures. The results informed the planning of the 21 February workshop.

Identification of demonstration showcase sites and the hosting of three Best Practice Open Days – January to March 2006

Hosted by exemplar regional Housing Associations, the Open Days provided housing professionals with an opportunity to see sustainable energy technologies in action, learn from project partners and hear feedback from tenants.

Workshop to identify procedures for imposing Best Practice – 21 February 2006

Hosted by RENEW North Staffs and Chaired by Martin Willey, the event brought together best practice and the results of SHAP's research into barriers in order to

explore how the region could ensure more widespread adoption of sustainable energy best practice in housing projects.

1. The Sustainable Housing Action Programme (SHAP)

Introduction to SHAP

The Sustainable Housing Action Programme (SHAP) was commissioned in August 2005 by Sustainability West Midlands, in partnership with Energy West Midlands and the Energy Saving Trust. The programme was initiated in response to the Sustainability Commentary produced by Sustainability West Midlands on the Regional Housing Strategy. The following aim was subsequently incorporated into the Strategy as a result of this Commentary:

“...provide examples of best practice in sustainable construction in parallel with the SWM Sustainable Construction Project, SWM Climate Change Programme and the Regional Energy Strategy.”¹

The aim of the Sustainable Housing Action Programme was to demonstrate how, through the promotion of existing best practice and identification of pathways and decision points particularly in the planning system, high specification energy efficiency and renewable energy measures could be mainstreamed into existing regional housing new build and refurbishment programmes. The Programme included a series of research projects and events. Hestia, a West Midlands based consultancy with expertise in the sustainable energy and housing sectors, provided both research and event management support throughout.

A steering group of key regional agencies and organisations were responsible for driving the programme of SHAP projects and events (outlined below). Further details of steering group members are included in Appendix A.

The SHAP programme of projects and events

The SHAP programme included a series of research projects and events that aimed to promote best practice demonstrated by existing local and national schemes and identify how these standards could be mainstreamed and or imposed through planning and development requirements.

The SHAP series of research projects and events were as follows. Please select the individual links below to access a summary and/ or the key findings of each project or event, or alternatively view Sections 5, 6 and 7 of this report:

Research on National and Regional Energy Efficiency Best Practice:

This research was carried out between August and September 2005 and identified projects that could be showcased at the Best Practice Case Study event planned for October 2005 and developed a practical database of projects and resources for housing professionals. The database is available online via both the SWM and Hestia websites. See www.sustainabilitywestmidlands.org.uk or www.hestiaservices.co.uk for further information.

¹ West Midlands Regional Housing Strategy, Chapter 7: Sustainable Communities, page 134, 7:50

Best Practice Case Study Event:

Held on 25 October 2005 at Advantage West Midlands and Chaired by RegenWM, the event was attended by housing professionals from across the West Midlands and highlighted the drivers and barriers to implementing sustainable energy best practice into housing new build and refurbishment projects.

Research into the provision of advice to Housing Associations and Private Developers and the barriers to incorporating sustainable energy measures in new dwellings:

Building on discussions at the Best Practice event, this research was conducted November 2005 to January 2006 and explored in detail the extent to which advice on sustainable energy best practice is being provided to housing professionals across the region, and the barriers to their more widespread implementation of measures. The results informed the development of a workshop planned for February 2006.

Identification of demonstration showcase sites for Best Practice Open Days:

Following on from the Best Practice event in October, showcase projects were identified as possible Open Day locations and the partners involved approached.

Best Practice Open Days (various locations):

Housing professionals from across the region visited best practice project sites between January and March 2006. Emily Street, a Victorian terrace refurbishment was the venue for an open day on the 18 January, attendees visited the new build development Francis Court on 8 February and Station Crescent in rural Shropshire on the 14 March. These projects were all featured in the Best Practice event in October 2005.

A report and/ or summary of the key findings of the above projects and events are provided in Section 5.

Workshop to identify procedures for imposing Best Practice:

Hosted by RENEW North Staffs on 21 February 2006, this workshop aimed to identify key activities that the region could undertake to help ensure more widespread adoption of sustainable energy best practice in housing projects. A key focus was on the use of existing planning and development systems, the regional market for sustainable energy technologies and better use of existing funding streams.

The key outputs from this workshop are reported in Section 6 and 7.

Final Report:

This Final Report draws together the SHAP project strands and based on the findings, seeks to recommend activities that could be used to support the more widespread implementation of sustainable energy technologies in housing across the West Midlands.

2. Housing in the West Midlands

The West Midlands region is home to 5.3 million people. At its heart lies the conurbation (Birmingham, the Black Country, Solihull and Coventry) one of the most densely populated areas of the country with a population of 2.25 million. More than 80% of the land area of the West Midlands is rural or semi rural, with more than half of this containing isolated settlements. However, such settlements account for less than 3.5% of the region's housing stock. The vast majority (85%) of dwellings are located in urban areas with a population of more than 10,000 people.

The number of households in the region is expected to increase by about 250,000 between 2001-2021, with the majority of this growth taking place in the Central Housing Market Area (around 156,000 households) where almost two thirds of the region's population (64%) and households (63%) reside. In terms of Affordable Housing (based on Regional Spatial Strategy household forecasts), there is a need for nearly 78,000 affordable housing units 2001-2021 and almost 47,000 social housing units in the same period.

14,153 new homes in total were built in the West Midlands during 2004-2005 with the majority of these (12,997) being built by private enterprises and the remaining 1,156 by social landlords. This growth accounted for 8.4% of the total new housing in England and for 9.4% of private and 6.9% of social landlord new build². Between the years 2001-2002 and 2004-2005, 8181 affordable housing units have been built in the West Midlands through the Housing Corporation's Approved Development Programme. 2144 of these were built during 2004-2005.

In terms of housing refurbishment the total number of homes undergoing works is not so easily measured, however the West Midlands has two Housing Market Renewal Pathfinder areas within which major housing regeneration is taking place and a number of other area based Neighbourhood Renewal programmes underway. The two Pathfinder areas are RENEW North Staffordshire, which will involve the refurbishment or modernisation of 36,000 properties; and Urban Living in Birmingham and Sandwell whose long term plans include the refurbishment of over 15,000 homes and environmental works to a further 12,800. Area based programmes include the government's New Deal for Communities initiative in Wolverhampton, Sandwell, Coventry, Aston, Kings Norton and Walsall. Approximately 4,000 households are involved in each of these areas. The Decent Homes 2010 target for housing association and local authority managed dwellings and vulnerable households in the private sector is also driving significant investment in housing improvement works.

² ODPM Statistical Release, 16 February 2006.

3. Research methodology

The research methodology used for the SHAP projects and events outlined above combined desk research, direct mailing, telephone based research and telephone interviews. Further details are available from Hestia, on request.

Events were targeted at all housing sector professionals as well as those involved in planning and development, and utilised local and regional networks as a means of promotion. Networks included the West Midlands HECA Forum, Sustainable Housing Partnership (SHOPAR) as well as those of regional agency SHAP partners (SWM, Energy West Midlands, Advantage West Midlands, Government Office and the Regional Assembly).

4. Communication & PR

Communication and PR support was provided to the SHAP project by Camargue PR, as part of its ongoing work with Energy West Midlands.

For each SHAP best practice open day, media relation activity was provided to ensure the successes of each individual project was effectively communicated to local authority/ social housing trade media and regional press.

A number of media relation techniques were utilised and included the development of post-event press releases, case studies and one-to-one journalist telephone briefings.

Activity highlights

A press release on the successful refurbishment of Emily Street was drafted and issued to the Birmingham Post and a phone press briefing coordinated between Sustainability West Midlands and the Birmingham Post environment report, Sarah Probert.

To support the open day at Accord Housing Association's Francis Court, a 1400 word case study was developed in partnership with Accord and Sustainability West Midlands. the feature is scheduled to appear in the April edition of Local Government News, the monthly trade title for local authority officers.

A press release was developed on South Shropshire Housing Association's Station Crescent development and has generated a sizable article in the Shropshire Star. An 800 word case study on the project has been agreed with Housing Association Building and Maintenance, and is scheduled to appear in its July 2006 edition.

5. Summary of key findings from each research area

Research on National and Regional Energy Efficiency Best Practice

The SHAP national and regional best practice case study research highlighted the wide range of best practice housing projects already active across England and the West Midlands. However, whilst many housing associations are building or refurbishing to increasing environmental standards, few private housing developers are yet to go beyond the minimum required by current Building Regulations.

Originally intended to be published in a report format, the results of SHAP's best practice research were developed into an online searchable database that housing professionals can use to support their housing project decision making process. The database provides information on available resources and best practice reports, and practical examples on how to integrate sustainable energy into:

- The design and construction of new housing
- Refurbishment of existing housing
- The adoption of management practices that reduce energy use

The database is available in Excel format via Hestia's website, and will also soon be available on Sustainability West Midlands' website when launched in [month] 2006. Database entries are categorised by three fields for easy access to specific information. These searchable categories indicate whether the entry is a case study or a resource, whether they are UK based, regional or local and the housing project type (new build, refurbishment or management practice).

See www.hestiaservices.co.uk (Resources – Practical Tools) and www.sustainabilitywestmidlands.org.uk for access to the database.

Best Practice Case Study Event

The Best Practice Case Study event took place on the 25th October 2005 and was hosted by Sustainability West Midlands, RegenWM and Advantage West Midlands. The event, highlighted sustainable energy best practice projects from across the West Midlands and offered attendees the opportunity to learn about the drivers, benefits and obstacles faced by partners involved, as well as gain their expert advice and recommendations for implementing similar future projects.

The event was attended by over 50 housing professionals and Chaired by Sophie Churchill of RegenWM, the Regeneration Centre of Excellence for the West Midlands. The programme consisted of introductory presentations followed by two Discussion Panels, with expert practitioners providing case study examples of projects that have integrated sustainable energy technologies or design in the following project types:

- The design of new houses

- Modification and improvement of existing stock to improve energy efficiency
- Management of existing housing stock to reduce energy use

Senior management support and a corporate commitment to protecting the environment, individual enthusiasm and funding were all identified as key drivers to projects presented. The Panel experts discussed how barriers faced by their own organisations were successfully overcome, and highlighted the corporate and individual household benefits to investing in sustainable energy best practice measures.

The SHAP market research into advice provision and barriers to implementation (January 2006) built upon these discussions through in depth telephone interviews with housing professionals from the social housing and private house building sectors.

Identification of showcase sites for Best Practice Open Days

Following on from the Best Practice Case Study Event, three organisations involved in projects demonstrating sustainable energy best practice were invited to host a Best Practice Open Day. The aim of these open days was to enable other housing professionals to see sustainable energy technologies in action, learn in more detail the economic, social and environmental benefits of the project and hear from residents living within the homes. The organisations approached and developments visited were:

Accord Housing Association – Francis Court, Halesowen

Francis Court is a new build housing development by Accord Housing Association designed specifically for those over the age of 45. Homes have been built using up to date environmentally sensitive techniques, and designed to minimise the amount of energy used to provide heating, hot water, lighting and power. The development includes super insulated walls, roof and floors, energy efficient windows and airtight construction. South facing conservatories help maximise solar gain and reduce artificial lighting requirements, wind cowls maximise the use of natural ventilation and a communal biomass boiler provides any heating required. A Sedum green roof has also been planted on the roofs and all homes have kitchens produced out of recycled materials and fitted using environmentally sensitive adhesives.

Black Country Housing Association – Emily Street, West Bromwich

Part of the 'Changing Rooms' project lead by e2S Environmental Consultants, Emily Street is an existing Victorian terraced property altered into a shop and has now been refurbished back into use as a dwelling with lifestyle and environmental sustainability in mind. A variety of sustainable energy technologies and techniques have been integrated into the property's refurbishment, including solar water heating, super insulation in the walls and roof and fuel efficient heating controls. The refurbishment also made use of recycled building materials and upgraded the windows to double glazing.

NB: The Changing Rooms project aims to demonstrate the improvement potential of existing dwellings and encourage 'movers and improvers' to remain part of a community's future, as well as help encourage new inhabitants to an area.

South Shropshire Housing Association – Station Crescent, Craven Arms

An innovative development by South Shropshire Housing Association, Station Crescent consists of 20 low energy homes built in such a style as to form a gateway into the market town of Craven Arms. The low energy rural homes have been built using Modern Methods of Construction and benefit from super insulation in their walls and roofs (improving on Building Regulation standards by 50%), but also renewable energy technology and solariums that capture passive solar energy and circulate air in winter and summer.

Best Practice Open Days

Accord Housing Association – Francis Court, Halesowen

24 delegates attended an open visit to Francis Court on 8 February 2006. Following introductory presentations from Sustainability West Midlands and Accord's Director of Regeneration, Alan Yates, delegates were given a guided tour of the development and an opportunity to network and question those involved in the project.

Discussions at the event included practicalities of managing such a project given limited staff resources, difficulties over the planning permissions required, and the maintenance requirements and skills of staff to carry out such maintenance works.

Black Country Housing Association – Emily Street, West Bromwich

Held on 18 January 2006, the open morning at Emily Street saw 22 visitors in three small groups. The number of visitors was limited only by the size of the property. Attendees were given a guided tour of the refurbished dwelling and also opportunity to ask questions of the key partners involved. One of the key issues raised related to the cost effectiveness of payback periods against upfront capital cost. It was highlighted that as a property's energy performance improves, the payback period for measures increases and therefore makes the incorporation of measures less cost effective. With the introduction of stricter Building Regulations from April 2006, this will become more the case with new build developments. Whilst new build measures are important, a much greater energy saving impact can be delivered by the incorporation of some Emily Street features into the refurbishment of the existing housing stock. The drivers to achieve this will be the availability of grant support and the increasing cost of energy.

South Shropshire Housing Association – Station Crescent, Craven Arms

45 attendees from the planning, building contractor and technology sectors came together on 14 March 2006 to visit the Station Crescent development in Shropshire. The open morning included presentations from both the lead partner, South Shropshire Housing Association, and Paul Rochester from the Department for Trade & Industry. The latter provided details of the Low Carbon Buildings Programme, to be launched in April 2006, to replace the former government renewable energy grant programmes: Clear Skies and Solar PV.

Research into the provision of advice to Housing Associations and Private Developers and the barriers to incorporating sustainable energy measures in new dwellings

Provision of advice

An increasing number of housing associations in the West Midlands are joining regional or sub-regional partnerships, and accessing advice and support from local and national Energy Saving Trust programmes or those offered by related organisations and professional bodies such as National Housing Federation and the Chartered Institute of Housing. The drive to be involved in sustainable energy projects is also demonstrated in the number and variety of best practice case studies contained in the SHAP case study and resource database, produced in November 2005.

However, private developers operating in the region do not yet appear to be seeking information or support on sustainable energy technologies, other than what is provided through professional bodies or trade associations. This may be due to lack of knowledge of the support available, or because Energy Saving Trust programmes have to date, focused support at local authority or housing association partners, with targets for improving the energy efficiency or thermal comfort of homes e.g. HECA³. However, with their being no legislative (or in many cases) local requirements for private developers to build new homes which incorporate sustainable energy measures above Building Regulation standard, there also exists no commercial advantage.

Barriers to implementation

At present, new build developments by housing associations are the main route through which best practice in high specification energy efficiency and renewable energy technologies are being incorporated into regional new build housing projects. The drivers behind these best practice projects are often legislation and funding based, with the Decent Homes Standard providing a minimum platform and capital funding requirements of the Housing Corporation providing an incentive.

However, there are regional examples of housing associations integrating environmental sustainability into internal corporate policy and housing management (e.g. South Shropshire Housing Association) above and beyond that required by government. Many have also founded exemplar sustainable energy projects (e.g. Accord Housing Association, Black Country Housing Association). These exemplar projects and organisations are providing a regional platform from which others are keen to learn. However, improved access to funding, greater corporate commitment and senior management support, and education and training of staff and tenants will be essential to their more widespread implementation.

³ The Home Energy Conservation Act requires all Energy Conservation Authorities, ECAs (those with responsibility for any tenure of housing) to submit a report to the Secretary of State on how they will cost-effectively reduce the energy used in homes across their area. ECAs have a target of 30% reduction in carbon dioxide emissions from a 1996 baseline within 15 years across all housing tenures.

Whilst smaller in number, private developers are beginning to engage in the sustainable energy in new housing agenda. However the driving force is predominately government or landowner minimum requirements. Private developers are driven by competition and end user demand, so until a significant commercial advantage in investing in sustainable energy technologies is demonstrated, end user demand for energy efficient homes increases, or minimum standards are raised, it will prove difficult to encourage more widespread private developer investment.

Local planning authorities have a number of routes available to them, through which sustainable energy standards can be required. However, although some routes are being utilised, few authorities across the UK, and none in the West Midlands, are taking advantage of their planning policy power to require standards above Building Regulations in all new dwellings. Implementation routes available to local authorities include:

- Adopting a planning policy that requires minimum renewable energy on-site generation e.g. London Borough of Woking use of PPS22
- Requiring a higher than minimum standard as part of a Section 106 Agreement
- Developing Supplementary Planning Guidance to encourage more widespread consideration of sustainable energy technologies/ design
- Requiring a higher than minimum requirement on the use/ sale of local authority owned land e.g. similar to the minimum EcoHomes rating required by English Partnerships
- Requiring higher than minimum standards in all new housing Design Briefs

Workshop to identify procedures for imposing Best Practice

A workshop bringing together regional best practice and the results of earlier research took place on 21 February 2006. The workshop aimed to explore how, through the better use of existing carrots (e.g. funding), sticks (e.g. planning policy) and better knowledge of and markets for existing technology, sustainable energy best practice could be more widely integrated into regional housing projects.

The outputs from the workshop are summarised in the following two Sections – 6 and 7. The key outputs identified in Section 6 will steer the activities of Sustainability West Midlands in 2006-2007, and focus on implementing sustainable energy best practice through the use of existing planning powers, land development requirements and through forging partnerships with key regional regeneration agencies. Section 7 summarises the additional key outputs from the event in which Sustainability West Midlands, the regional agencies and also local partners will play a key delivery role.

6. 'Delivering the climate change challenge through planning and development'

Outputs from workshop to identify procedures for imposing Best Practice

'Delivering the climate change challenge through planning and development' took place on 21 February 2006. Over 50 delegates from a range of housing, planning and development backgrounds came together at this focused event, to consider ways in which barriers to more widespread use of sustainable energy best practice in housing could be overcome. Also, to discuss the way in which adaptation to a changing climate in the West Midlands should be built into all new building decision making processes.

The event was Chaired by Martin Willey (FRTPI, FCIS) of YTP – Strategic Regeneration and Partnership Consultants, and hosted by RENEW North Staffs – one of the two government funded Housing Market Renewal Pathfinder Areas within the West Midlands.

The event programme was of two halves, with the morning focusing on key activities for 2006-2007 to enable the more widespread delivery of sustainable energy through housing activities. Afternoon presentations highlighted the activities of the Sustainability West Midlands Climate Change Partnership supported by Severn Trent Water, key drivers for integrating adaptation as well as mitigation measures into regional decision-making processes, and projects in which adaptation considerations are already being implemented.

Three morning breakout sessions focusing on the *Carrots, Sticks and Technology* opportunities for mainstreaming exemplar activity, enabled discussions to be focused on key resolutions that could be implemented, or significant progress made upon, within one year. Delegates were advised that these resolutions would feed into Sustainability West Midlands' Business Plan for 2006-2007, and also help in structuring regional and local activities to support the integration of sustainable energy best practice into planning and development activity. The key activities to be led by Sustainability West Midlands into 2006-2007 are outlined below.

Sustainability West Midlands key activities for 2006-2007

In that a number of local planning authorities across the country have already successfully implemented minimum renewable energy generation requirements on all new building developments through the effective use of their planning powers, it is recognised that there already exists a regulatory framework that local planning authorities can use to impose minimum sustainable energy standards. Also, although no longer involved in building homes, local authorities have significant influence over all new build within their area, particularly on land owned by the council that is to be sold for redevelopment or if involved in government funded regeneration or neighbourhood renewal projects.

Sustainability West Midlands activities in 2006-2007 will aim to ensure more widespread use of planning and development powers to impose sustainable energy best practice in housing.

The Energy Saving Trust has indicated that funding to the value of £35,000 will be made available to each English region in 2006-2007. Sustainability West Midlands and partners will submit a proposal to the Energy Saving Trust to continue the SHAP project, with the key aim being to carry out the activities identified by attendees at the February event that will help embed sustainable energy into planning and development activities, into their 2006-2007 business plan. These activities are as follows:

<i>Key activity 2006-2007</i>
Target activity with those local planning authorities most willing and able to integrate sustainable energy into planning policy/ development activities e.g. Section 106 but require support (staff expertise/ resources or political leadership) to achieve this.
Engage with both Housing Market Renewal Pathfinder areas in the region to explore how sustainable energy and climate change adaptation can be embedded into the design and refurbishment of housing during 2006-2007 as well as future decision-making practices.
Communicate with all regional planning authorities to raise awareness of activities 1. and 2. Disseminate best practice from both activities to all authorities, and all Strategic Housing Authorities within the authority (politicians/ Chief Executive to front line delivery staff). Use case studies to demonstrate cost-benefits and how to overcome barriers.
Develop 'model' planning policy statement(s) that could be adapted for use by all local planning authorities in the West Midlands. Models to include targets/ requirements appropriate to both the rural and urban authority areas.
Develop 'model' Supplementary Planning Guidance for local planning authority adaptation.
Region to provide tools/ resources that will help local authorities 'sustainability proof' their Local Development Framework.
Region to provide guidance that will help local authorities 'future proof' planning policies against predicted climate change in the West Midlands.
Through use of Sustainability Checklist and model planning policies, ensure local authorities across adopt a consistent approach to sustainable energy in the region.
Encourage neighbouring local planning authorities to develop a 'united front' towards planning requirements to eliminate potential for private developers to move business to 'less strict' authority areas.
Organise a series of road shows to promote what planners can do through the best use of existing powers and legislative frameworks.
Enable and encourage neighbouring planning authorities to work together to share understanding of planning policies and best practice.

These activities will aim to overcome the following barriers:

- Lack of expertise or understanding of sustainable or renewable energy technologies

- Lack of drive from the regional level
- Lack of support and backing both politically and from a regional level, meaning that officers do not feel they have an adequate defence on why policies should include sustainable energy requirements
- Fears for the local economy – many areas of land are already not desirable to developers and local authorities are wary of requiring more strict standards
- Planning policy changes to support more widespread sustainable energy technology use need to include cultural change, both in terms of attitudes and working practices

From April 2006, Sustainability West Midlands will also be developing the role of the SWM Climate Change Partnership into one that incorporates climate change adaptation and mitigation activities. SWM's continuing role in SHAP related activities during 2006-2007 will play a key part in ensuring that these key climate change responses are combined into all housing related activities across the region.

Delegates at the February workshop identified a number of additional activities and these are outlined in Section 7, and divided into two sub-sections. 7a details activities for which a potential lead partner has been identified and can be delivered or started within one year, 7b activities are aspirational and may require long term development. The widespread support of professional bodies, agencies, and networks across the region will be vital will be essential to ensuring that a cohesive message is delivered to private companies and the social housing sector on the importance and benefits of sustainable energy best practice to reducing the potential impact of climate change in the West Midlands, ensuring affordable warmth for all residents and securing their commercial advantage now and in the future.

7. Additional key activities to support the more widespread implementation of sustainable energy best practice

A number of activities were identified by delegates at the *'Delivering the climate change challenge through planning and development event'* on 21 February as being key to ensuring more widespread implementation of sustainable energy best practice.

These activities have been divided into two sub-sections. Sub-section 7a activities are those that can potentially be lead by an existing partner or organisation in the region, and delivered or started within one year. 7b activities are aspirational and may require longer term planning and development by a wide range of partners.

Activities will aim to recognise the importance of the following:

- a. That the need for education and training in the use of sustainable energy technologies and their economic, social and environmental benefits has been a common theme throughout SHAP, particularly with local political leaders, Chief Executives and senior housing decision makers.
- b. Local politicians can be a valuable ally in driving key agendas forward but councillors are generally risk adverse, particularly on topics with implications for the local economy and incomes. Chief Executives of housing organisations are also often wary of changes that staff are unsure of or against.
- c. There is a lack of understanding and appropriate information about climate change and sustainable energy technologies, and this has been frequently been highlighted by all housing sectors as a barrier to more widespread implementation of measures. Knowledge transfer from experts and exemplar organisations to colleagues involved in planning and development controls, homebuyers and tenants is fundamental. Best practice should be more widely promoted, and the focus of information provided more appropriately targeted for each housing sector.
- d. Robust and appropriately targeted marketing campaigns can be very effective in promoting key messages. Communication and awareness raising has been identified as a priority to ensure more widespread regional adoption of best practice, and the marketing techniques used to engage priority target groups will be key.
- e. Demonstrating the cost benefits of installing sustainable energy measures and encouraging a move towards using whole life costing in decision-making processes will be vitally important, as will the promotion of case studies already demonstrating sustainable energy best practice within and outside the region.
- f. In order to encourage the more widespread use of sustainable energy technologies, the regional market must also be supported and developed. There are also a number of incentive led initiatives that local authorities and

the region could consider implementing in order to drive this development. As with many recommendations already made, communicating with the appropriate individuals and with appropriate information is of key importance.

- g. Single technology pilots to increase the uptake of the most economically viable energy saving measure for the region could be developed (similar to that developed by the North East region for cavity wall insulation). This could be supported by research into low or zero carbon technologies most advantageous for the region e.g. in areas off mains gas.
- h. Whilst a good option for housing consortia involved in new build or refurbishment projects, large scale purchasing does limit choice and the scale of purchase invokes EU procurement rules that have to be carefully applied if organisations wish to support the local economy by selecting locally produced products that are fit for purpose and best value over those from other EU countries.

Sub-section 7a: Activities to be potentially lead by other regional partners during 2006-2007

<i>Proposed activity</i>	<i>Potential lead</i>
Local authorities involved in government funded regeneration or neighbourhood renewal projects to ensure sustainable energy requirements are integral to housing investment plans for that area – measures could be funded through capital grants schemes e.g. Low Carbon Buildings Programme (from April 2006), Energy Efficiency Commitment etc.	Local authorities/ West Midlands HECA Forum
Region to explore how Local Area Agreements can be used to help combine available funding streams and increase uptake of sustainable energy measures.	Government Office for the West Midlands
Region to support education at councillor and Chief Executive level about the benefits of sustainable energy activities in medium-long term and impact of local climate change on economy, business and housing energy use.	EST local support teams
Region to provide training on the regional impact of climate change.	SWMCCP
Planning ‘task force’ to be set up to consider how to best interpret PPS22 for regional use.	Regional Planning Partnership
AWM to ensure widespread communication and use of WWF regional Sustainability Checklist (currently being developed). AWM to pilot the Checklist	AWM and WMRA

with X local planning authorities and disseminate lessons/ benefits/ outcomes to all local authorities in the region and through regionally based professional institutes and partnerships.	
Develop a Nottingham-esque declaration for all local planning authorities to sign, that will commit them to setting a standard renewable energy percentage target or require minimum energy efficiency standards (above Building Regulation) in all new build.	SWM CCP, LGA, SDON and others
Link communication of sustainable energy best practice to existing regional or local initiatives and activities. Set up pilot projects that will test out use of existing powers at a small scale, local level.	EST local support teams
Organise a councillor and planning officer study tour of a best practice local planning authority area.	EST local support teams
Utilise and promote Energy Saving Trust and other expert agencies free support services and resources.	EST local support teams
Develop more widespread understanding of whole life costings for new build developments, demonstrating the role of environmental costs in the decision making process. Produce easy to use resources that provide examples and evidence.	Coordination role for WMSIE
Use whole life costing as evidence for trade offs between higher upfront capital costs for sustainable energy technologies and the need to adapt to predicted climate change.	Coordination role for WMSIE
Through knowledge building, change the economic drivers currently used in new build decision making to those that take account of the whole life cost of homes and commercial advantages to integrating sustainable energy adaptation measures.	Coordination role for WMSIE
Work with local and regional media to ensure appropriate messages are communicated in all features about climate change and sustainability.	Energy West Midlands, SWM
Distribute AWM's sustainable development policy about future proofing, to all councillors and local political leaders across the West Midlands.	AWM

Region to support the regional microrenewables planning officer seminar, to be organised by the two regional Local Energy Support teams in May 2006.	EST local support teams
Region to develop evidence base providing information on the durability of sustainable energy technologies	Coordination role for WMSIE
Develop local incentives based schemes to encourage more widespread installation of use of energy saving measures e.g. Council Tax rebates (either carbon savings based or on installation of renewable energy systems). NB: Overall this should be a revenue-neutral package for all, with council tax reduction funded out of a higher starting rate from which discounts can be afforded, and that higher rate funding grants to help low-income home-owners to implement the measures necessary to achieve the lower tax rate.	Local Authorities, West Midlands HECA Forum

Sub-section 7b: Aspirational activities, or those requiring longer term planning

- Explore how to greater efficiencies and improved environmental standards can be achieved through combining stock investment programmes within the region.
- Explore how Pathfinder funding levels could be increased.
- Set target date to be set for all construction and housing professionals to undertake Continued Professional Development (CPD) courses on climate change mitigation and adaptation measures. Suggested date March 2007 – to be enforced by regionally based professional institutes.
- Regional professional institutes to start requiring evidence of up to date CPD training on sustainable energy measures as part of letters of appointment and selection process.
- Develop regional marketing campaigns targeted at decision makers in all housing sectors.
- Change the name of those councillors with lead on sustainability within the region's local authorities, to 'the champion for future generations'.
- Use the power of procurement to deliver higher quality, more cost effective sustainable energy technology in the region. This could be done through local authority purchasing consortia or Regional Centre of Excellence in Procurement. Focus could be about specifications, bulk buying, or simply sharing knowledge.
- Encourage local authorities to take strategic view in accepting reduced capital receipts to integrate sustainable energy technologies into new developments

- Use existing building sector networks to develop sustainable energy procurement activities and to deliver training on appropriate use of technologies/ design methods.
- Consider developing a certification scheme that accredits individuals and organisations according to their sustainability credentials. Certificates could be made a requirement for all regional public procurement and then be promoted to private sector organisations as best practice.

Appendix A

SHAP Steering Group members August 2005 – March 2006

Advantage West Midlands Buildings Technology Cluster	Jackie Wellings
E2S Environmental Consultants/ Black Country Housing Group	Richard Baines
West Midlands Centre for Constructing Excellence/ Chase Norton Construction	George Marsh
Energy Saving Trust	Sheila Keating
Energy West Midlands (Chair)	Adrian Smith
Government Office for the West Midlands	Ian Smith
Government Office for the West Midlands	John Horseman
Hestia	Ellie Cooper
Hestia	John Bloxsom
Marches Energy Agency	Richard Davies
Sustainability West Midlands	John Sharpe
Sustainability West Midlands	Wendy Sharpe
Urban Living	Rod Griffin
West Midlands Energy Efficiency Advice Centres	Lynn Melling
West Midlands Regional Assembly	Steve Forrest

Appendix B

Forthcoming legislation

European, UK and National

A number of central government and national movements are currently underway to raise the energy efficiency standards of new buildings. This increasing pressure from National government and commitment to implement legislation that will mitigate and require adaptation to the effects of climate change provides a platform from which regions and local authorities can demonstrate the importance of sustainable energy targets. The expertise of exemplar councils such as those with Beacon Sustainable Energy Beacon Council status should be used to promote the benefits of action now to local politicians, Chief Executives and senior housing decision makers.

European Energy Performance of Buildings Directive

Will require UK-wide introduction of the following: single national energy calculation methodology (SAP), Energy Performance Certificates, minimum energy performance standards, regular inspection system for boilers over 20kW, and inspection of air-conditioning systems over 12kW. The Housing Act and Building Regulations help translate the EU Directive into national law.

Building Regulations for England & Wales (from 6 April 2006)

Approved Documents for new and existing dwellings have been separated into Parts L1A and L1B. L1A, the Regulations for new dwellings, includes new standards for improved external lighting, a minimum boiler efficiency rating (SEDBUK) A or B, the limitation of excessive solar gains, improved airtightness and encourages the use of renewable and low carbon technologies. L1B, for existing dwellings, requires dwellings Energy Performance Certificate to be updated on improvement works, a minimum boiler SEDBUK rating A or B, increased performance standards of extensions and improved lighting standards. In addition, from 1 April 2005, it was mandatory to fit gas condensing boilers when replacing old or installing new central heating systems, and this will also apply to oil-fired condensing boilers from 1 April 2007.

Housing Act 2004

The Housing Act will require all new and existing homes marketed for sale or let from April 2007, to have a Home Information Pack (HIP). The HIP will include a Home Condition Report and Energy Performance Certificate detailing the energy efficiency (SAP) of the property and estimated cost of heating and hot water per year. The Certificate will also suggest cost-effective energy efficiency measures that could be installed to improve the energy performance of the dwelling.

The Code for Sustainable Homes

The Code for Sustainable Homes will be a voluntary initiative by Government and Industry, to actively promote the transformation of the building industry towards more sustainable practices. It builds on the approach of the EcoHomes standard and proposes to set star ratings based on the energy efficiency and environmental

sustainability of new homes. Where there is a relevant building regulation, the minimum Code standard will at least equal or exceed it. Minimum standards will be set for each essential element and all of these that must be achieved if a home is to meet Code standards. A consultation on the proposed Code ended 6 March 2006.

Climate Change and Sustainable Energy Bill

This Bill would require the Government to produce a fiscal and economic strategy to assist with microgeneration and energy efficiency in order to combat climate change and alleviate fuel poverty. It would introduce both UK and local targets for the take-up of microgeneration, and set up a scheme requiring electricity suppliers to buy electricity produced by domestic customers by microgeneration. An amendment to the Bill, suggesting minimum national targets for renewable energy within new buildings and dwellings was introduced early February 2006 but defeated by vote. However, this has led to ODPM calling for an "urgent review" of PPS22.

Microgeneration Strategy & Low Carbon Buildings Programme

Published March 2006, the objective of the Government's Microgeneration Strategy is to create conditions under which microgeneration becomes a realistic alternative or supplementary energy generation source for the householder, the community and for small businesses. The Strategy recognises that Energy policy in the UK is facing a number of challenges including an increasing urgency in the need to tackle climate change, rising energy prices hitting the most vulnerable and the UK becoming a net importer of oil and gas. Microgeneration technologies have the potential to make a significant contribution to the UK's energy policy goals of tackling climate change, ensuring reliable energy supplies and tackling fuel poverty.

The Strategy outlines a number of actions that the Government and other partners will undertake to help increase the use of microgeneration technologies. These actions include:

- Energy suppliers to develop a scheme that will reward microgenerators exporting excess electricity
- DEFRA to look in detail at the possibility of including electricity generating technologies (other than microCHP) into the third round framework of the Energy Efficiency Commitment
- DTI to work with ODPM and planning officers to identify their information needs and if required, develop a specifically designed communication pack
- DTI to lead work with other Government Departments and local authorities to publish a report on measures that local authorities can take to improve energy efficiency and levels of microgeneration installations, reduce greenhouse gas emissions and alleviate fuel poverty
- ODPM to undertake an urgent review of local plans to determine whether there is a problem with emerging plans that do not fully incorporate Planning Policy Statement (PPS) 22 on Renewable Energy

Progress in implementing these and other actions contained within the Strategy, will be assessed on a continual basis with a report published each year as part of the annual report on progress against Energy White Paper objectives, produced under the Sustainable Energy Act 2003.

In April 2006 the Government will also launch the Low Carbon Buildings Programme, which aims to encourage uptake of both energy efficiency and microgeneration technologies in buildings. The Programme replaces the earlier Clear Skies and Solar PV capital grant schemes and will provide £80 million in funding, through two grant streams, between 2006 and 2009. The original fund of £30 million allocated to the Programme by DTI was supplemented by an announcement in Budget 2006 of a further £50 million to help fund the installation of microgeneration technologies in a range of buildings including schools, social and local authority housing, businesses and public buildings. The Programme will be administered by a consortium involving the Energy Saving Trust and BRE.