

SHAP CONFERENCE 2016

**SHAP Sustainable Finance Task and
Finish Group**

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European Union
European Structural
and Investment Funds



Sustainable Finance T&F Group – 2016/17

NEW PARTNERS WELCOME!

- Objectives:
 - Whole house approach to retrofit to achieve minimum running cost/ CO2
 - Subsidy and policy autonomous financial model
 - A delivery model that *enables* collaboration
- Activities:
 - Pursue key lines of enquiry to achieve scale, reduce delivery costs, attract better finance and ensure engaged consumers e.g.
 - Develop evidence base – Existing and new DATA
 - Develop evidence base – PARTNERS and PILOTS
 - How to ‘unlock’ low cost finance e.g. capital contributions from HA, PWLB, EIB
 - Identify preferred delivery approach (HA, contractor, ESCo, other?)

Brief scope of works

Develop evidence base – existing and new DATA

- Activity needs to be directed by outcomes of Data workshop BUT might include:
 - Using NEF guidance from their Asset Information Project to consolidate key data sets from multiple HA's (est. £15k, 8 weeks)
 - Commission Parity Projects CROHM stock assessment on key common archetypes (est. £20k, 6 weeks)
 - Developing whole house retrofit plan, with high level costs and timescales using Beyond Decent Homes principles. (est. £8k, 4 weeks)
- **OUTCOME:** Database of common asset information and retrofit plan for key common archetypes on which to kick start a collaborative whole house retrofit delivery model.

Develop evidence base – Partners and Pilots & Identify preferred delivery approach

- Develop delivery programme with HA partners based on key archetypes/ whole house retrofit plan identified above e.g. consider wider asset management considerations (life of asset, timing with other planned works etc.) (est. £8k, 4 weeks)
- Identify whole life costs over life of retrofit plan (or optimum timescale agreed with the HA), revenue potential and contributions needed (HA capital, finance etc.) (est. £6k, 4 weeks)
- Undertake SWAT analysis of suitable delivery method e.g. HA with contractor framework, contractor led (insurance backed warranties?), ESCo., CIC? (est. £20k, 8 weeks)
- Plan programme to procure delivery method, secure HA partners/ properties, identify potential financiers (est. £4k, 4 weeks)
- **OUTCOME:** Fully worked up whole house retrofit model with whole life costs, preferred delivery method, and programme that can be used to secure HA commitment and financial backing (HA, PWLB, private etc.).