

Appendix 2 - High level delivery plan for Sustainable Warmth

Funding provided to Solihull

	Capital	Administrative Allocation (Admin and Ancillary)
Home Upgrade Grant (HUG) Phase 1	£320,000	£32,000
Local Authority Delivery (LAD) Phase 3	£830,000	£83,000
TOTAL	£1,150,000	£115,000

Project delivery and key roles

	SMBC	SCH
Responsible officer	Austin Rodriguez (Head of Stronger Communities)	Mark Pinnell (Executive Director for Asset Management and Development)
Project Team	Paul McGrath (Housing Strategy Officer for Climate Change and Fuel Poverty), David White (Contracts Grants and Projects Officer) and Project Manager to be recruited (0.2 FTE)	Ed Roper (Strategic & Energy Projects Officer)
Third party support	Act On Energy as the Council's contracted energy efficiency partner and contracted partner to deliver the Customer Journey for Sustainable Warmth on behalf of the Midland Energy Hub	

Third party delivery

Providers to be procured to deliver the following on behalf of SMBC and SCH:

Requirements	Options
<ul style="list-style-type: none"> Retrofit assessor(s) Retrofit coordinator(s) Fabric installer*, including doors, windows, insulation Electrical installer*, including solar, heat pumps, storage heaters 	<ul style="list-style-type: none"> Via current SMBC and SCH contracts or frameworks Via SMBC procurement policies and procedures (open competition or direct awards) Via Midland Energy Hub Direct Purchasing System

* installers must be Trustmark accredited

Household and property eligibility

	LADS3 criteria	HUG criteria
Household eligibility	<ul style="list-style-type: none"> Lives in a postcode with a high prevalence of free school meal eligibility (first five digits of postcode – approximately 7,500 properties in scope) Or is a SCH tenant Or is in receipt of means tested benefits Or can provide evidence of an annual income of less than £30,000 	
Property eligibility	<ul style="list-style-type: none"> EPC rating of D to G Total number of Ds capped at 30% of total programme Total number of social housing properties capped at 10% of total (and "in-fill" for overall programme) 	<ul style="list-style-type: none"> As per LADS3, plus must be off-gas grid
Landlord eligibility	<ul style="list-style-type: none"> Must contribute up to 50% of the LADS3 grant up to a maximum of £2,500 per property (and LADS3 grant of £5,000) 	<ul style="list-style-type: none"> Must contribute one third of the cost of upgrades up to a maximum of £12,500 (based on a HUG grant of £25,000)
Available funding	<ul style="list-style-type: none"> Average investment per property set at £5,000 of socially and privately rented properties and £10,000 for owner occupiers (low-income owner occupied with no requirement to contribute) 	<ul style="list-style-type: none"> Dependent on fuel type and EPC, with ranging from £10,000 for D rated properties with electric heating, up to £25,000 for F/G rated properties with oil/coal/LPG/solid fuel types

Outline delivery plan

Category	Activity	Details	Estimated financial commitment
Admin and ancillary	Employee costs (project team)	<ul style="list-style-type: none"> Project team 	£45,000
	Communications and marketing	<ul style="list-style-type: none"> Raising household awareness and engagement with domestic energy efficiency Encouraging expressions of interest from eligible households Directed activity in Chelmsley Wood and Elmdon 	£10,000
	Training and development	<ul style="list-style-type: none"> Funding of accredited training for local workforce in understanding retrofit, retrofit advice, assessors and coordination 	£15,000
	Retrofit assessments and coordination	<ul style="list-style-type: none"> Preparatory work with households and properties Directed activity in Chelmsley Wood and Elmdon Provision of retrofit assessments to private rented sector and social housing properties 	£45,000
Capital	Social Housing	<ul style="list-style-type: none"> Solihull Community Housing asset management programme – up to 10% of total capital spend (as “in-fill” within wider programme) 	£115,000
	Home Owners	<ul style="list-style-type: none"> Via expressions of interest from eligible, low-income households Via directed programme in Chelmsley Wood and Elmdon Households can choose between SMBC facilitated delivery or the awarding of a grant to organise and undertake works independently 	£920,000
	Private rented sector	<ul style="list-style-type: none"> Via expressions of interest from eligible, low-income households Grants awarded to landlords to organised and undertake works independently (SMBC provides the retrofit assessment, coordination and assurance on completion) 	£115,000