

Wates

WATES
RETROFIT

RETROFIT SERVICES.



RETROFIT.



In 2020, we launched our social housing retrofit service, an end-to-end, fully PAS 2035 compliant, whole-house retrofit service to enable social housing landlords to meet the Government's target for all social housing to achieve an EPC rating of C and above by 2030.

At Wates we have over 30 PAS 2035 compliance projects either completed or ongoing, improving the energy efficiency of over 5000 homes, with further projects anticipated through Social Housing Decarbonisation Fund Wave 2..

Our Wates Retrofit service is designed to guide customers through every step of their retrofit journey, from initial stock analysis and design, through to final install and monitoring.

We work collaboratively with our customers and consultant partners through every stage of the journey, including accessing funding, where we have supported customers secure over £100m of funding through the Social Housing Decarbonisation Fund.

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Our aim is to help customers reduce their carbon emissions, but within this vital objective is another pressing issue: families are facing rising energy costs. Helping to address this makes our retrofit work even more important.

BEN WILLIAMS

Head of Zero Carbon Retrofit



CURRENT PROJECTS.

	ORGANISATION	PROJECT VALUE	NO. OF HOMES	FUNDING SOURCE
1	 Brent Brent Council	£3m	124	SHDF Wave 2
2	 CLARION HOUSING GROUP Clarion	£7m	363	SHDF Wave 2
3	 L&Q L&Q	3.5m	135	SHDF Wave 2
4	 Stevenage BOROUGH COUNCIL Stevenage Borough Council	£7m	237	SHDF Wave 2
5	 settle Settle	£11m	677	SHDF Wave 2
6	 Riverside Riverside Group	£3m	150	SHDF Wave 2
7	 Crawley Borough Council Crawley Homes	£7m	200	SHDF Wave 2
8	 WOLVERHAMPTON HOMES Wolverhampton Homes	£5m	100	SHDF Wave 2
9	 Bromford. Bromford Housing	£8m	257	SHDF Wave 2
10	 STONEWATER Stonewater	£7.5m	434	SHDF Wave 2
11	 the guinness partnership Guinness Partnership	£2m	50	SHDF Wave 2
12	 Bassetlaw DISTRICT COUNCIL North Nottinghamshire Bassetlaw District Council	£1,5m	26	SHDF Wave 1
13	 Mansfield District Council Mansfield District Council	£1,5m	26	SHDF Wave 1

COMPLETED PROJECTS.

	ORGANISATION	PROJECT VALUE	NO. OF HOMES	FUNDING SOURCE
1	London Borough of Brent	£150k	3	Direct funding
2	Stevenage Borough Council	£500k	330	LAD 1b
	Stevenage Borough Council	£2,7m	399	SHDF Wave 1
3	London Borough of Enfield	£3,2m	118	LAD 1b
	London Borough of Enfield	£1,3m	70	SHDF Wave 1
4	Northampton Partnership Homes	£4,1m	80	SHDF Demonstrator
	Northampton Partnership Homes	£9m	250	SHDF Wave 1
5	Citizen Housing and Rooftop Housing Group	£3,4m	80	SHDF Demonstrator
6	Nottinghamshire County Council	£1,5m	26	SHDF Demonstrator
7	Leeds City Council	£10,1m	750	European Regional Development Fund (ERDF)
8	Stonewater	£1,8m	130	Direct funding
9	Wrexham County Borough Council	£200k	2	Other
10	Berneslai Homes	£50k	2	Direct funding
11	Thurrock Borough Council	£3,45m	75	Direct funding
12	Dacorum Borough Council	£500k	22	SHDF Wave 1
13	The Guinness Partnership	£1,2m	52	SHDF Wave 1
14	The Community Housing Group	£500k	22	SHDF Wave 1
15	Midland Heart	£2m	71	SHDF Wave 1
16	St Leger Homes	£2,5m	115	SHDF Wave 1

OUR OFFER.

The service includes:



STOCK ANALYSIS



We support our clients by identifying suitable homes within their portfolio for retrofitting, whilst also identifying appropriate funding streams.

FUNDING SUPPORT



We support clients identify and access available Government funding including The Social Housing Decarbonisation Fund (SHDF) and Energy Company Obligation (ECO) and provide dedicated teams to support with bid applications.

PAS 2035 SERVICES



We provide an end to end PAS 2035 compliant service including retrofit assessments, retrofit coordination and retrofit design.

ENERGY AND BIM MODELLING



We ensure homes achieve specific heat targets, including 90kWh/m²/pa for SHDF Wave 1, whilst also providing customers with a BIM model to integrate into asset management systems.

DELIVERY



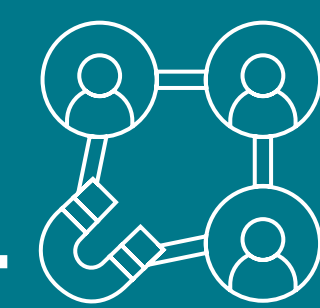
We have highly experienced and trained delivery teams that work alongside Wates' leading quality management processes to ensure effective delivery of a successful project.

ACCREDITED SUPPLY CHAIN



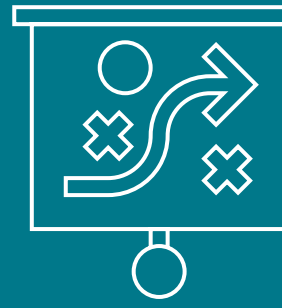
We have developed partnerships with local and national supply chain partners, accredited to PAS 2030/ MCS to deliver quality at scale.

RESIDENT ENGAGEMENT



Our dedicated team of Customer Service Managers ensure we deliver a world class end to end customer journey, keeping residents both engaged and informed throughout the project.

ASSET MANAGEMENT STRATEGIES



We have extensive experience in developing retrofit strategies and projects alongside other planned investment works, generating efficiencies and minimising disruption for residents.

REPORTING AND EVALUATION



We implement innovative and smart technologies to ensure we understand how the properties are performing – pre and post project, linking into customers asset management systems.

COMPLIANCE



We have dedicated teams and partners to manage the strict compliance requirements of PAS 2035, including satisfying Trustmark and BEIS.

FUNDING SUPPORT.

With decarbonisation costs having to be factored in with the substantial investment already needed to meet other key legislation such as the Building Safety Act 2022, securing external funding is critical to support social housing landlords on the path to zero carbon.

The Government has already earmarked £3.8 billion over a 10 year period of funding for energy efficiency upgrades through a Social Housing Decarbonisation Fund (SHDF)

We have supported housing providers secure over £100m Social Housing Decarbonisation Funding through Wave 1 and Wave 2.

Our experienced and dedicated team, which works alongside external consultant partners to support with funding applications, can support in the following areas:

- Stock analysis and eligibility
- Pre-bid surveys and archetype design
- Bid management

- Bid writing and method statements

- Pricing/cost information

We also have experience and partnerships across a range of other funding schemes including:

- The Energy Company Obligation
- Green Homes Grant Local Authority Delivery Scheme
- The Sustainable Warmth Competition

We can work with you to ensure all funding avenues are explored and maximised according to the eligibility criteria of your homes and residents.



£100 BILLION

Estimated cost of retrofitting
all UK social housing to
Government targets

EASE OF PROCUREMENT.

Customers can use a number of these frameworks to direct award Social Housing Decarbonisation Fund projects due to the tight delivery timeframes.

The benefits include:

- OJEU compliant
- Cost and quality certainty
- Quick route to market
- National coverage across the UK
- Direct award option to meet tight project timescales.
- Open to all public sector bodies



QUICK AND COMPLIANT

We are on several procurement frameworks, which offer social housing providers quick and compliant routes to market to deliver whole house retrofit and asset management programmes.

FUSION²¹

South East Consortium

pfh PROCUREMENT FOR HOUSING

COMMUNITIES + HOUSING INVESTMENT CONSORTIUM

EEM Efficiency East Midlands Ltd

gfp GREENER FUTURES PARTNERSHIP

LHC Trusted procurement for better buildings and homes

EN:PROCURE BUILDING COMMUNITIES IN NORTHERN ENGLAND

EN:EFFICIENCY NORTH BUILDING COMMUNITIES IN NORTHERN ENGLAND

Procure PLUS

Procure Partnerships FRAMEWORK

OUR WORK IN PRACTICE.

CASE STUDY 1 WYCHAVON

CLIENT ROOFTOP HOUSING & CITIZEN HOUSING



TAKING A FABRIC FIRST APPROACH

This vital Social Housing Decarbonisation Fund (SHDF) Demonstrator project took a fabric first approach to bring the properties in line with the Government's targets for social housing to achieve Energy Performance Certificate (EPC) ratings of C while also achieving the heat outputs in accordance with the Department for Business, Energy and Industrial Strategy's (BEIS) SHDF targets. A project designed to achieve warm, energy efficient homes with reduced carbon emissions that ultimately help to tackle fuel poverty, this project began with the fabric of the homes to find the most effective and cost efficient measures to achieve the project's objectives. Designed to prevent property heat loss, the retrofit of the 80 homes incorporated a range of energy efficiency measures, including external wall insulation, new windows, new ventilation and air source heat pumps to some properties.

DELIVERING RETROFIT IN RURAL LOCATIONS

Due to the rural location of the properties, the Wates Living Space team overcame challenges along the way to ensure the important retrofit

investment was taken forward for as many properties as possible. This included the submission for planning permission for the external modification to some houses to accommodate the installation of external wall insulation. The project team balanced the views and requirements of multiple planning departments and coordinated a full planning application to the local planning authority, the result of which was the installation of an external wall insulation system of up to 150mm thick, which was finished with brick effect render to ensure a close match to the existing exterior wall finish.

Delivering social housing retrofit within a rural location, the team were also required to undertake bird and bat surveys as well as ensuring property suitability due to overhead power lines. Also integral to the programme was ensuring that the requirements of rural off-grid properties were considered to account for a lack of gas supply or access to solid fuel. Taking each property on a case-by-case basis, the team was able to design and install retrofit measures that were suitable to the home, which resulted in the adoption of air source heat pumps where required.

ACHIEVING VALUE FOR MONEY

As experts in social housing retrofit, Wates Living Space understands the constraints on project budgets and that every penny spent must demonstrate value for money. Extensive value engineering was undertaken on the project to maximise budget. This was made more challenging by the rural location of the project, which resulted in poor accessibility for large parts of the retrofit supply chain. As a result, Wates Living Space has developed a new retrofit supply chain strategy throughout its SME partner network to help boost the availability of suppliers and subcontractors in rural locations to facilitate the efficient delivery of retrofit work.

Ensuring value for money also extends to the evidence of impact for social housing retrofit, and social landlords understandably want to monitor and report on the outcomes of their investment. This project saw the installation of Switchee landlord hubs, which have been installed to feed vital information to landlords, enabling them to track, monitor and take action on the energy use and heat outputs to ultimately help with residents' energy bills.

Number of homes:

80

Project value:

£3M

OUR WORK IN PRACTICE.

CASE STUDY 2 SHDF DEMONSTRATOR

CLIENT NORTHAMPTON PARTNERSHIP HOMES



NORTHAMPTON
PARTNERSHIP HOMES

**73% REDUCTION IN SPACE
HEATING DEMAND**

Number of homes:

80

Contract value:

£4.1M

In Spring 2022, we completed our first Social Housing Decarbonisation Fund (SHDF) Demonstrator projects on behalf of Northampton Partnership Homes (NPH).

This included the retrofit of 80 properties, which took the properties' Energy Performance Certificate (EPC) ratings from D/E to B/C, putting NPH on the front foot in achieving the Government's target for UK social housing to be rated as EPC C by 2030.

Taking a whole house fabric-first approach, the project aimed to reduce space heating demand from a pre-retrofit average of 208 kWh/m² to no greater than 50 kWh/m². A range of energy efficiency measures were installed, including loft insulation, ventilation, new windows and doors, and external wall insulation. As a result, the project has achieved a 73% reduction in space heating demand, achieving a 70% reduction in carbon emissions while successfully reducing energy consumption and protecting households from rising energy costs.

The NPH SHDF Demonstrator project saw the our team source the most effective solutions to suit property type, broadening the scope of the project to embrace innovation. This included

the installation of Switchee Landlord Hub and Dashboard systems to enable NPH to measure performance and identify potential inefficiencies. An Internet of Things (IoT) solution has also been installed to measure performance, measuring temperature changes as well as metrics to assess internal ventilation.

One of the greatest successes of this project is its wider application to future retrofit work. NPH matched its SHDF funding to invest in wider energy efficiency measures, including Air Source Heat Pumps and Photovoltaic panels, to review suitability for larger programmes to retrofit its estate of 12,000 homes. Informing NPH's future investments in energy efficiency measures is also reliant on the lessons learnt from the programme. By working collaboratively, NPH and Wates Living Space have shown the concept works, that even 90-year-old homes can be converted to zero carbon. This achievement is now being scaled up for SHDF wave 1, with the retrofit of a further 400 homes.

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This project targeted homes built in the early 1900s, which were some of the least energy efficient we manage, so we're absolutely delighted with these outcomes. We've spoken to residents who have complimented Wates Living Space for their communication and professionalism throughout the works on their home.

They're extremely pleased with the results and have told us how much easier it is to heat their homes and keep warm. Saving money on energy bills is another advantage, especially in the current climate of rising living costs. We look forward to continuing our partnership with Wates Living Space and bringing these benefits to more residents.

WINSTON WILLIAMS

Director of Asset Management at NPH

OUR WORK IN PRACTICE.

CASE STUDY 3 ARMTHORPE, WHEATLEY & INTAKE

CLIENT ST LEGER HOMES

SCOPE OF WORKS SCAFFOLDING; RE-ROOFING INCLUDING FASCIA, SOFFIT, AND GUTTERS; CAVITY AND LOFT INSULATION; EXTERNAL WALL INSULATION



DECARBONISATION IN PRACTICE

Doncaster-based housing provider, St Leger Homes, recently appointed us to deliver a planned programme of retrofit works to 125 homes, facilitated in-part through the Social Housing Decarbonisation Fund (SHDF). Our shared goal for providing homes that people are proud to live in saw us significantly upgrade homes to bring them in line with the Government's targets for all social housing to achieve Energy Performance Certificate (EPC) ratings of C by 2030.

To date, each of the homes has received a series of retrofit measures to enhance efficiency, including re-roofing with fascia, soffit and gutters, cavity and loft insulation and external wall insulation. The client was granted £700,000 funding from the Government through the SHDF after we reached the deadline of 100 completed homes by the end of June.

ASSESSING AND OVERCOMING CHALLENGES

Keeping to programme was essential to comply with SHDF funding, so managing logistics was vital during this project. Accessing properties to carry out detailed surveys was a challenge throughout; at least four surveys were included in the assessments and it was difficult at times to coordinate all surveys street by street, requiring us to re-sequence the pattern of works across different estates to progress the retrofit programme.

As a business committed to continual learning, we know that a project can often teach us far more than we first expect. This retrofit project demonstrated the importance of surveying as soon as possible to allow time for non-access and design discussions to take place, and this is a key learning that we will take into future project planning.

Securing a fully-compliant supply chain is a challenge seen across the industry, and one we were faced with during our project with St Leger Homes. We were able to overcome this by working closely with our supply chain partners (High Scaff, Tickhill Roofing, Thomas and Niamh, Axal Services and Dyson Energy Services), assisting them with SHDF compliance through PAS 2030.

CREATING BIODIVERSITY

When undertaking projects, we strive to leave a lasting positive impact on the local community. For this project, we have engaged with a local allotment society to provide seeds and labour for vegetables. The local allotment is extremely important to the community; not only does it provide a healthy activity for people to connect with nature and enhance their mental health and wellbeing, it provides fresh, seasonal produce for local people. This highlights the importance of our investment in the allotment to allow it to flourish for the benefit of residents in the future.

Number of homes:

125

Project value:

£3M

£700k SHDF funding



CONTACTS.

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