



BUILDING HOMES
MAKING PLACES
ENHANCING LIVES

Shaping Optivo's Retrofit Journey

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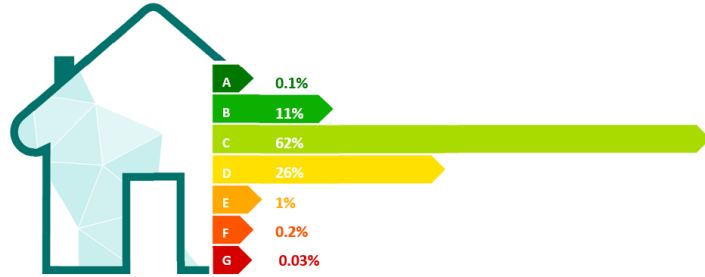


Targets and baseline



72.5%

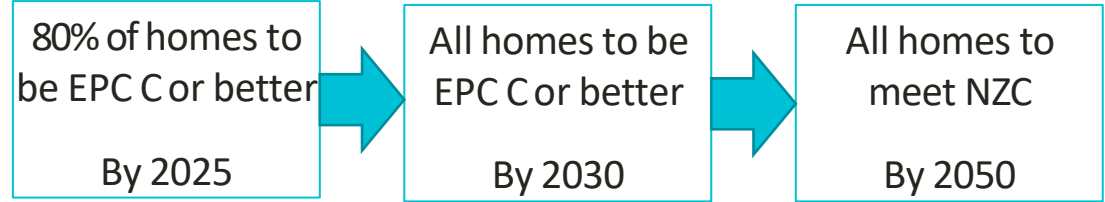
of our homes meet EPC Band C and above



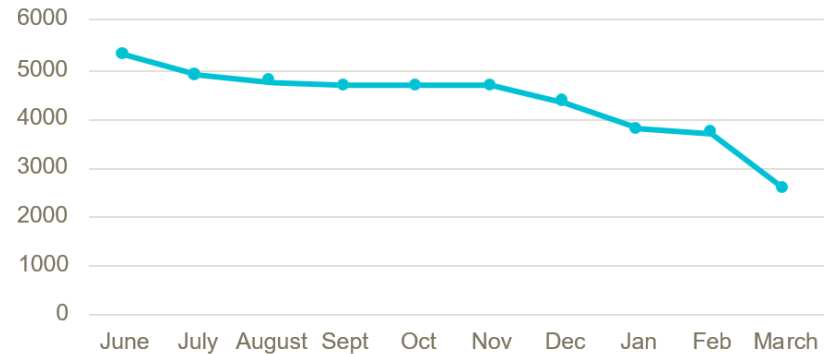
99.5%

of our new homes met EPC Band B and above

	Homes	%
A	5	0.8%
B	657	98.6%
C	3	0.5%



Closing the data gap





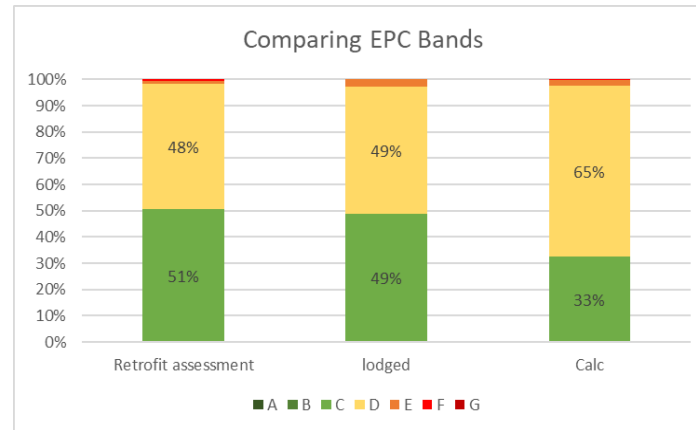
Our recent data refresh has highlighted the importance, but also risks of improving our data. We're working to increase and improve our *actual* data and reduce reliance on extrapolated data, ensuring calculated SAP scores and lodged EPC are consistent and accurate.

But, with so much of the data changing, so many variables to consider and inconsistencies in surveys (EPC Surveys and Stock Condition Surveys), it can make it difficult to predict what our energy profile will look in the future. As we move away from extrapolated data, it could make our performance go up or down.

We received external feedback that the approach energy surveyors take has changed over the years, with surveyors assuming poor performance, where in the past they may have assumed better performance. While this is the correct approach, it does mean as we refresh older or expired EPCs, we're finding the SAP score is lower.

Questions to consider

With the SAP methodology due to change to SAP 10, what impact will this have on EPCs?
Will comparison with old and new EPCs be valid?



Data improvements



- Ensuring asset management system is kept up to date with all retrofit/ reinvestment works,
 - Uploading additional information into energy modelling tool e.g. boiler data,
 - Increasing the volume of stock condition surveys,
 - Targeting EPC surveys at the c1,500 remaining homes where we have a data gap,
 - Completing over 1,000 retrofit assessments,
 - Increasing scrutiny on data collected from EPCs, stock condition surveys and retrofit assessments,
 - Using UPRNs (Unique Property Reference Numbers) to extract data from lodged EPCs, particularly important as the data retrieval service is not available.
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Scenarios and forecasting



Baseline (as existing)			L1(a) U-values			Improved U-values			RAG rating (based on target heat demand of 90 kWh/m2)
Annual Heat Demand kWh	Heat Demand kWh/m	Baseline EPC Score (Full SAP file)	Proposed Annual Heat Demand kW	Proposed Heat Demand	Proposed EPC Score	Proposed Annual Heat Demand kWh	Proposed Heat Demand	Proposed EPC Score	
7688.87	197.15	62 D	4215.49	108.09	69 C	3441.25	88.24	71 C	
12868.57	160.86	62 D	6330.89	79.14	70 C	n/a	n/a	n/a	
12271.63	138.29	65 D	7169.13	80.79	70 C	n/a	n/a	n/a	
8647.92	107.80	71 C	6941.83	86.53	71 C	n/a	n/a	n/a	
10758.82	134.12	68 D	6120.02	76.29	73 C	n/a	n/a	n/a	
7756.82	92.67	73 C	6376.08	76.18	72 C	n/a	n/a	n/a	
7045.41	161.52	59 D	4622.16	105.96	65 D	3661.40	83.94	68 D	
9511.51	111.12	67 D	7167.53	83.73	68 D	n/a	n/a	n/a	
12784.92	142.63	65 D	7150.72	79.77	71 C	n/a	n/a	n/a	
14049.51	149.34	64 D	7617.31	80.97	71 C	n/a	n/a	n/a	
14969.41	159.11	63 D	8116.06	86.27	70 C	n/a	n/a	n/a	
14969.41	159.11	63 D	8116.06	86.27	70 C	n/a	n/a	n/a	
14301.46	189.60	60 D	7399.76	98.10	70 C	6180.26	81.93	72 C	
14599.66	219.41	56 D	7423.04	111.56	67 D	6183.31	92.93	70 C	
13449.06	222.15	57 D	6402.91	105.76	68 D	5250.47	86.73	71 C	
13191.64	199.00	60 D	6543.81	98.71	70 C	5358.00	80.83	72 C	
12494.64	188.48	28 F	5640.16	85.08	49 E	n/a	n/a	n/a	
14220.67	214.52	57 D	7040.55	106.21	68 D	5760.01	86.89	71 C	
5326.89	136.59	68 D	4208.33	107.91	69 C	3435.77	88.10	71 C	
4859.9	124.61	64 D	3787.5	97.12	66 D	3092.20	79.29	68 D	
12529.94	203.97	59 D	6292.37	102.43	69 C	5102.35	83.06	72 C	
17247.91	147.17	64 D	7475.55	63.78	74 C	n/a	n/a	n/a	

- Procured and mobilised PAS2035 professional services.
- Completed over 1,000 Retrofit Assessments
- Cost estimations using Fusion 21 pricing framework with Retrofit Installer
- Assessed homes to move through to detailed design with appointed architects.



Retrofit Roadmap

Setting out our overall approach to retrofitting our homes between now and 2050.

Retrofit Programme Board

Ensuring the delivery of the strategic objectives through a variety of workstreams

Sustainability Champions

Placing residents at the heart of our strategy and roadmap, ensuring they are part of the co-creation and delivery.





Resident engagement plan

Resident comms plan includes key stages:

- Awareness
- Assessment
- Further engagement
- Install
- Completion
- Monitoring

Other engagement

- Sustainability co-creation workshop
- Resident group presentations
- Updates given at area Strategy Panels
- Recruitment of Sustainability Champions
- Resident comms plan 'visual journey'





Progress so far

- Retrofitted over 1000 homes
- Awarded SHIFT Gold for 4th year
- Sustainability Strategy 2021-25
- Asset Management Strategy 2021-2025
- Providing formal training of colleagues for PAS 2035 certification
- Procured a robust procurement framework for delivery of retrofit works
- Appointed a provider of PAS 2035 services and retrofit coordination
- Procured an end to end retrofit installer

Now Planning

- Trial fabric-led retrofit projects
- Build our skills base and improve data and modelling
- Launch the resident engagement and communications plan
- Define the retrofit approach for leaseholders
- Identify sources of internal and external funding
- Update the assumptions in the Long Term Financial Plan
- Upgrading properties via ECO4 and ECO+

By 2025

Build up capacity

- Focus on priority geographic areas and property archetypes
- Expand the trial delivery of our retrofit programme
- Secure internal resource capacity and capability
- Procure longer term partnering contracts
- Secure additional resources from external sources

2021

2022

80% of homes at least EPC Band C

2025

By 2030 Realignment

- Evaluate actual energy performance of retrofitted homes
- Understand technology innovations
- Decide on the approach for procurement long term
- Update the retrofit plan for lessons learned
- Update the retrofit plan for government policy developments and funding schemes
- Update assumptions in the Long Term Financial Plan

- Ongoing EPC update programme
- Targeting missing energy performance data
- Amended our retrofit modelling scenarios and cost assumptions
- Submitted SHDF bid
- Identifying target retrofit properties - location, archetype, condition, clusters
- Upgrading cavity wall insulation with ECO3 funding

All homes at least EPC Band C

2030

By 2050 Full roll out

- Rollout the investment programme to have all properties retrofitted by 2050.

All homes are net zero carbon

2050



Take aways



- Upskill internally
- Consider different form of contracts
- Delve into data
- Improve data: better data, better decisions
- Don't underestimate the costs
- Communicate early with residents
- Resident engagement is key
- Don't wait for a 'silver bullet'
- Share best practice and lessons learned





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Thank you

