



EVALUATION OF THE SUSTAINABLE WARMTH FUND (SWF)

Comprising of Home Upgrade Grant (HUGI) Scheme and Green Homes Grant - Local Authority Delivery (LAD3) Scheme in Sefton

2022-2023



THE STORY SO FAR EXECUTIVE SUMMARY

This report presents the findings of the Green Homes Grant Local Authority Delivery (GHG LAD3) scheme and the Home Upgrade Grant (HUG1) in the Sefton borough area.

These Government-led schemes aimed to give low-income households a more sustainable future by increasing the energy efficiency of poorly insulated homes. Delivered by Sefton Council, as part of a consortium of local authorities across the Liverpool City Region (LCR), both initiatives have successfully helped those most at risk of fuel poverty.

The Department for Energy Security and Net Zero (DESNZ) allocated funding to the Liverpool Combined Authority to deliver both projects across the Liverpool City Region. The Home Upgrade Grant (HUG) Phase 1, saw the government allocate over £218million throughout the UK, with just under £500,000 going to the borough of Sefton. While the Local Authority Delivery (LAD) scheme Phase 3, had over £280 million allocated from the government, with just over £3.4million being awarded overall to Sefton.

As part of the HUG1 and LAD3 schemes, residents received a range of energy-efficient measures installed in their homes by local contractors, which included solar photovoltaic (PV) panels, air source heat pumps, external and internal wall insulation, loft insulation, cavity wall insulation, underfloor insulation and window replacements.

The works have not only helped to reduce carbon emissions and tackle rising fuel costs for the most vulnerable residents, but have also generated a boost to the local economy thanks to the creation of over 21 jobs for the delivery of both schemes within Sefton.

Sefton Council helped 386 households in total, with over a 1000 residents expressing interest initially. Sefton's delivery of the scheme accounts for 13% of the LCR targets and LCR accounted for 15% of the national output

of the housing retrofit delivery. Nationally, around 18,000 homes were improved through this funding. Sefton also led the way installing Solid Wall Insulation, as the top performing Local Authority in the LCR and within the top 3 nationally.

The work undertaken helps Sefton Council meet their goal of reaching a net zero target by 2030 and the LCR net zero target by 2040, in line with the five-year climate change action plan. However, meeting the 2040 target would require 60,000 homes every year in the Liverpool City Region to become retrofitted with sustainable energy-solutions.

In Sefton, extra funding is needed to achieve net zero targets, and demand for the energy-efficient works outweighs the funding available, as more applications were received than the amount of funding available.

A Sefton Council spokesperson said: "To continue to work towards this goal, over £4billion of further funding will be needed to upgrade Sefton homes. Almost all of Sefton's 129,000 homes will need intervention if the borough is to achieve the carbon reduction targets."

David Colbourne, Housing Retrofit Manager at Liverpool City Region Combined Authority, said: "The Combined Authority has recently issued a Net Zero plan for the next five years, this is part of the roll out and we will be endeavouring to do a lot more work in future. We will seek all funding opportunities we can from the government, or other opportunities, and will be very active in trying to source this to ensure we can help more residents."

Liverpool City Region Combined Authority was awarded Best Local Authority Retrofit Project by 'The Retrofit Academy' for their work on Sustainable Warmth. Their spokesperson said, "This is a significant recognition of the work we have undertaken and a strong indicator of our achievements."

HOME UPGRADE GRANT (HUG1) SCHEME

The Government's Home Upgrade Grant (HUG1) aimed to increase the energy efficiency of low-income and poorly insulated homes that are off the gas grid (homes that are not primarily heated using gas). These are homes that may be heated by electric heaters, oil or propane, as well as those that have a gas connection but don't have a gas central heating system or may not have any fixed heating.

Phase 1 of this scheme has seen the government allocate over £218 million throughout the UK, including in the borough of Sefton. This first phase was due to be completed by April 2023 but was extended a further five months and finally completed at the end of August 2023. A further £700 million of funding is available throughout the country for Phase 2 (HUG2), which will run

until March 2025. The Combined Authority will be delivering Phase 2 on behalf of the Liverpool City Region, and Sefton Council has already provided a pipeline of residents that would be eligible for this fund.

Phase 1 of the project delivered 42 upgrades to 34 homes.

As part of HUG1, residents benefited from solar photovoltaic (PV) panels, air source heat pumps, external and internal wall insulation, loft insulation, cavity wall insulation and underfloor insulation.

These works have helped to reduce carbon emissions and tackle rising fuel costs for the most vulnerable residents.



WHO WAS ELIGIBLE:

- Off gas grid homes with an Energy Performance Certificate rating of D, E, F or G
- Household income of £30,000 per annum or less

IMPROVING PROPERTIES AROUND SEFTON (HUG1)



HUGI CASE STUDIES



Ann, Bootle
Scheme: HUG1 (Home Upgrade Grant)

Ann had external wall insulation fitted as part of the Home Upgrade Grant (HUG)1 scheme.

Multiple generations of Ann's family have lived at the Sefton borough property, with Ann herself living there for a grand total of 74 years. Due to the age of the property, improvements were needed to help Ann out of fuel poverty.

A retrofit assessor approached Ann to inform her of the scheme and the free works available. Ann's son, along with the retrofit team, helped her with the process of understanding the scheme and its benefits, which gave her the confidence to go ahead.

When asked about how the scheme has helped, Ann explained how she is already seeing the financial benefits, with her energy bills showing a considerable reduction.

Ann also said her house is noticeably warmer, the results have left her feeling healthier and happier.

She said: "I have issues with my health, I've been in and out of hospital and I think the house being warmer has helped me. Before we had the work done there was mould behind the wardrobe upstairs but there is not now."

"Now that the outside looks nice, it makes me want to sort the inside of my home, I'm happy I've had it done; I would definitely recommend."

HUGI CASE STUDIES



Mr & Mrs G, Ince Blundell
Scheme: HUGI (Home Upgrade Grant)

Mr & Mrs G received an air source heat pump in their Ince Blundell home as part of the Home Upgrade Grant (HUGI) scheme. The couple now consider the sustainable energy installation as a 'real game changer.'

Before the installation, the residents relied on external deliveries of LPG gas bottles to keep their house warm. The bottles were not only costly to the couple but also produced greater carbon emissions.

Mr G said: "When we had that hard winter a few years ago, two bottles lasted us three weeks and at the moment they're about 70 quid a bottle!"

We used to have wait inside the house all day for the delivery of it too."

The couple no longer have to do this and have had their air source heat pump for just over a year, already experiencing the benefits of the energy-efficient source through a cold winter.

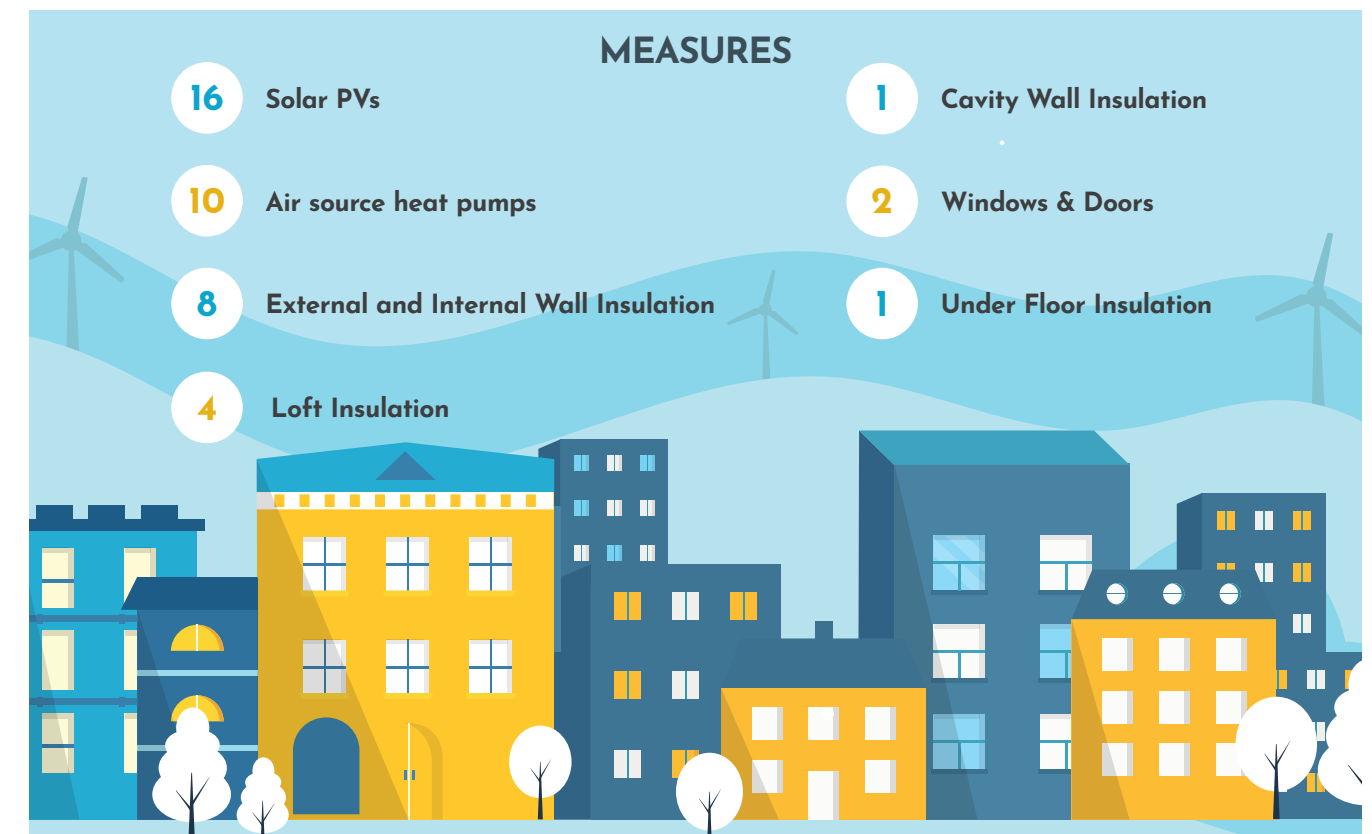
With an air source heat pump, users can set the temperatures in the property and it keeps the property at those temperatures as opposed to turning the heating on when you need it.

"It is a cleaner source of energy", added Mr G.

"I wouldn't entertain gas after this, considering we got these works for nothing, you can't complain at that can you. It feels like we live in a different house now."

KEEPING HOMES WARM THIS WINTER WITH HUGI

HOW MANY HOMES WERE WORKED ON?

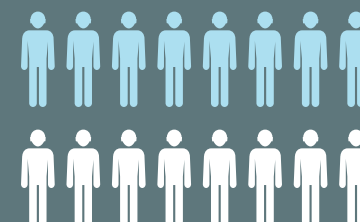


42 TOTAL NO. OF MEASURES

34 TOTAL NO. OF PROPERTIES

How many jobs did this create in the borough?

20+



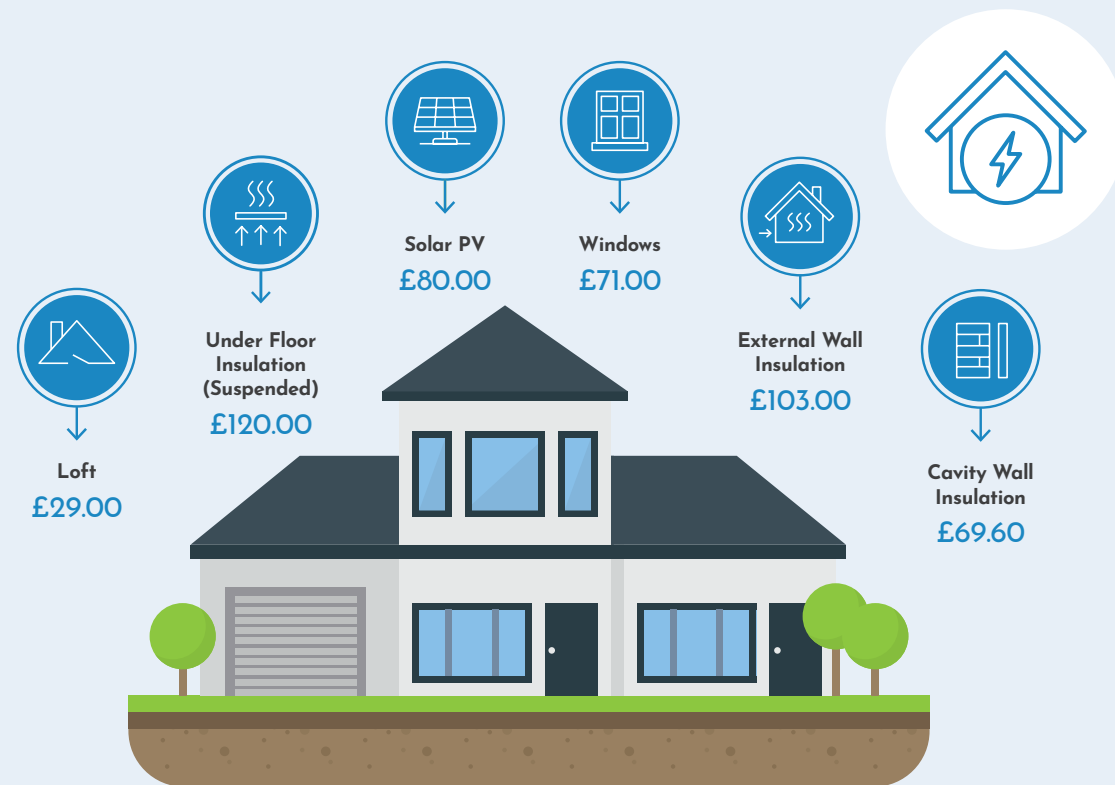
Including:

1 x Operations Manager (sustained from LAD2)
1x Contracts Managers (sustained from LAD2)
1x Retrofit Co-ordinator (sustained from LAD2)
1x Retrofit Assessor (sustained from LAD2)
1x Site Supervisor
1x Air Source Heat Pump Teams of 3

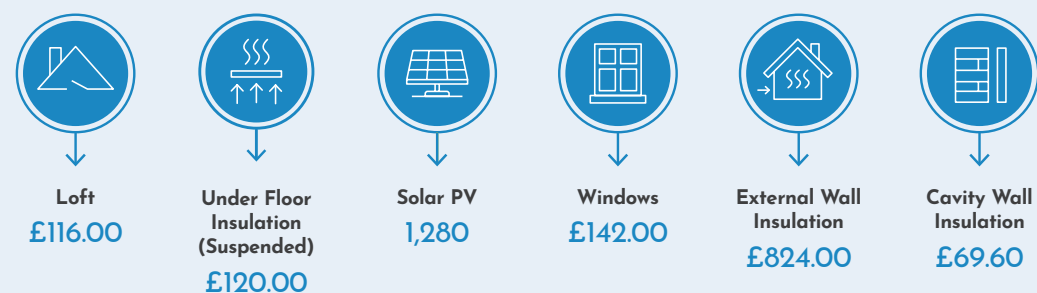
2x Plumber/heating operatives
1x Plumbing Apprentice
1 Plasterer
2 Renderers
1x Labourer
1x Project Planner
1x Project Manager
1x Renewables Manager
1x Solar team (2 people)
1x Compliance coordinator

HUGI SAVINGS

POTENTIAL HOUSEHOLD FUEL COST SAVINGS (YEARLY SAVINGS TO THE HOMEOWNER)



POTENTIAL ANNUAL FUEL SAVINGS ACROSS HUGI*



OVERALL POTENTIAL ANNUAL ENVIRONMENTAL IMPACT

Across HUGI contract we have made potential annual carbon savings of 112 tonnes

PER PROPERTY POTENTIAL ANNUAL ENVIRONMENTAL IMPACT

Average annual carbon savings of 3.29 tonnes of CO₂ per property

*based on all measures being completed in one property

THE STORY SO FAR GREEN HOMES GRANT LAD3

The Government's Local Authority Delivery (LAD) scheme aimed to increase the energy efficiency of poorly insulated homes for those on a low income. Phase 3 of this scheme, launched in the spring of 2022, has seen the government allocate over £280 million to local areas throughout the UK, including the borough of Sefton.

Sefton Council, as part of a consortium of local authorities across the Liverpool City Region, successfully obtained funding to retrofit domestic properties in Sefton. As required by the scheme, the council adopted a fabric-first approach, which focuses on insulation to reduce heat loss from homes in conjunction with utilising renewable energy with Solar PV installations.

The original funding allocated to Sefton was £2.3 million with over an additional £1million of funding awarded due to the high demand and successful delivery in the initial stages of the programme. All works were due to be completed by April 2023, but the programme was extended by six months across the country. All Sefton works were completed by the final deadline, October 2023.

The scheme was very successful and the final number of properties and families we were able to help through this programme was 352. The works that were carried out consisted of 376 energy saving measures, including external wall insulation, cavity wall insulation, loft insulation, Solar PV installation and window replacements.

The project reduces the need for heating and electricity, helping to save residents money and reducing fuel poverty. The measures will also reduce carbon emissions across the borough of Sefton, which will aid in tackling climate change.

Of the 9,179 measures installed nationwide in the LAD Phase 3 scheme, 2,854 were in the

North West (31%), and Sefton Council residents benefitted from 376 of these.

Residents who benefitted were required to make an application, provide evidence of their income, and have an assessment carried out on their homes. If they met the criteria, work on their homes began in line with PAS2035 standard, which ensures the work is independently assessed, executed to the highest standards and fully insured.

Previously, the LAD2 scheme resulted in 222 Sefton properties benefiting from works that were delivered on time and on budget. The last of the works under this scheme were completed in September 2022 and has helped reduce carbon emissions and combat rising fuel costs for the most vulnerable. Lessons were learned from this initial roll out, which made the LAD3 delivery smoother and gave residents' confidence that the scheme was genuine.

In Sefton, more funding is needed to achieve net zero targets, and demand for the energy-efficient works outweighs the current funding available.

WHO WAS ELIGIBLE:

- Households with a gross combined income below £30,000 or who receive qualifying benefits
- Properties with an Energy Performance Certificate rating of D*, E, F or G
- Homeowners and private renters

*D rated properties without insulation

LAD3 CASE STUDIES



Ms W, Bootle
Scheme: Green Homes Grant - Local Authority Delivery (LAD3) Scheme

Ms W had Solar Photovoltaic (PV) panels fitted to her property in Bootle as part of Sefton Council's roll out of the Green Homes Grant - Local Authority Delivery (LAD3) Scheme.

The renewable energy source will help generate energy at the property by capturing the solar radiation (energy) from the sun and converting it into electricity, resulting in Mrs W needing to buy less electricity from the grid and thus reducing her electricity bills.

Ms W had the Solar PV installed at the end of September 2023 and is looking forward to the long-term energy savings the panels will bring. She said: "It's very early days with the install of the

solar panels so I've not noticed a difference yet but I'm looking forward to seeing the results."

Ms W was recommended the scheme through her daughter who had External Wall Insulation (EWI) installed through the scheme. After contacting the team, Ms W said the process was very quick.

"From start to finish it took about four to five weeks," said Ms W, "It has been seamless, there has been no problems, they have answered any questions I had."

"The guys on the day were finished in a few hours, there was minimum disruption, they only had to turn the electric off for a few minutes. It's amazing to have had the opportunity to get the solar panels, I've done my research on how much it was to have them installed."

LAD3 CASE STUDIES



Mr and Mrs W, Bootle
Scheme: Green Homes Grant - Local Authority Delivery (LAD3) Scheme

Mr and Mrs W, from Bootle, had External Wall Insulation (EWI) installed at their home as part of the Local Authority Delivery (LAD3) Scheme.

The couple have lived in the property for 57 years, and were more than happy to receive the energy-efficiency works.

The Ecogee team, who informed them of the free scheme during a door-knock, explained everything they needed to know about the LAD3 grant.

From the initial approach, right through to the completed works, the entire process took one month.

"The on-site team who installed the EWI were great. We had to go abroad and felt comfortable with them being in the property for a week.

They were easy to get hold of and if we had a query about anything they would help us and put us into contact with the on-site team.

We've not had to put the heating on as much as we would do at this time of year, we can notice a difference already because in the winter it gets freezing cold.

Everything they told us we were getting, we got, they were very good, and now it looks lovely, and we are really made up with what they've done."

LAD3 CASE STUDIES



John and Christine, Bootle
(One Vision Housing)
Elizabeth, Bootle (One Vision Housing)
Scheme: Green Homes Grant - Local
Authority Delivery (LAD3) Scheme

Thanks to support from Sefton Council's Green Homes Grant, five apartment blocks underwent an exterior renovation. Several residents benefitted from the works which were installed by Ecogee and Sovini Property Services.

The project aimed to improve carbon reduction and help customers reduce their energy bills by improving thermal insulation. EWI was installed as part of the SWF, One Vision Housing (OVH) also funded a new roof, windows and doors.

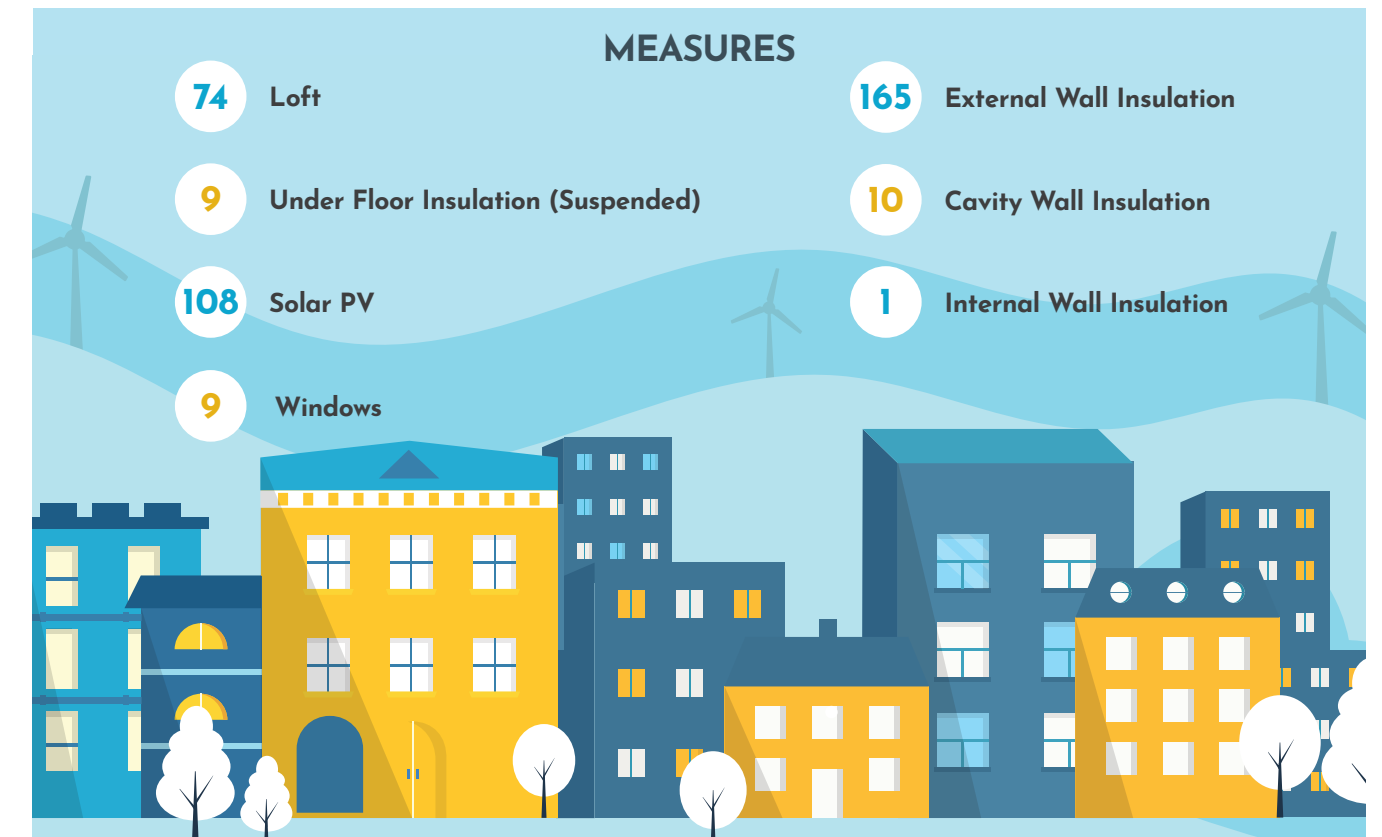
One Vision Housing customers John and Christine have lived in their home for 24 years and said: "We have already seen an impact, our energy bills have gone down during the winter as our home was much warmer. It's also been lovely and cool during the warmer weather. We love the new rendering too."

One Vision Housing customer Elizabeth lives in an apartment block that was renovated and said: "The whole thing is wonderful; we are really happy with it."

KEEPING HOMES WARM THIS WINTER WITH LAD3

HOW MANY HOMES WERE WORKED ON?

352

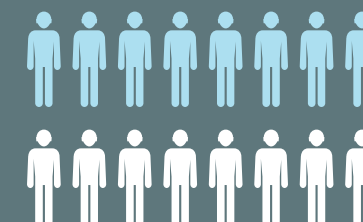


376 TOTAL NO. OF MEASURES

352 TOTAL NO. OF PROPERTIES

How many jobs did this create in the borough?

20+



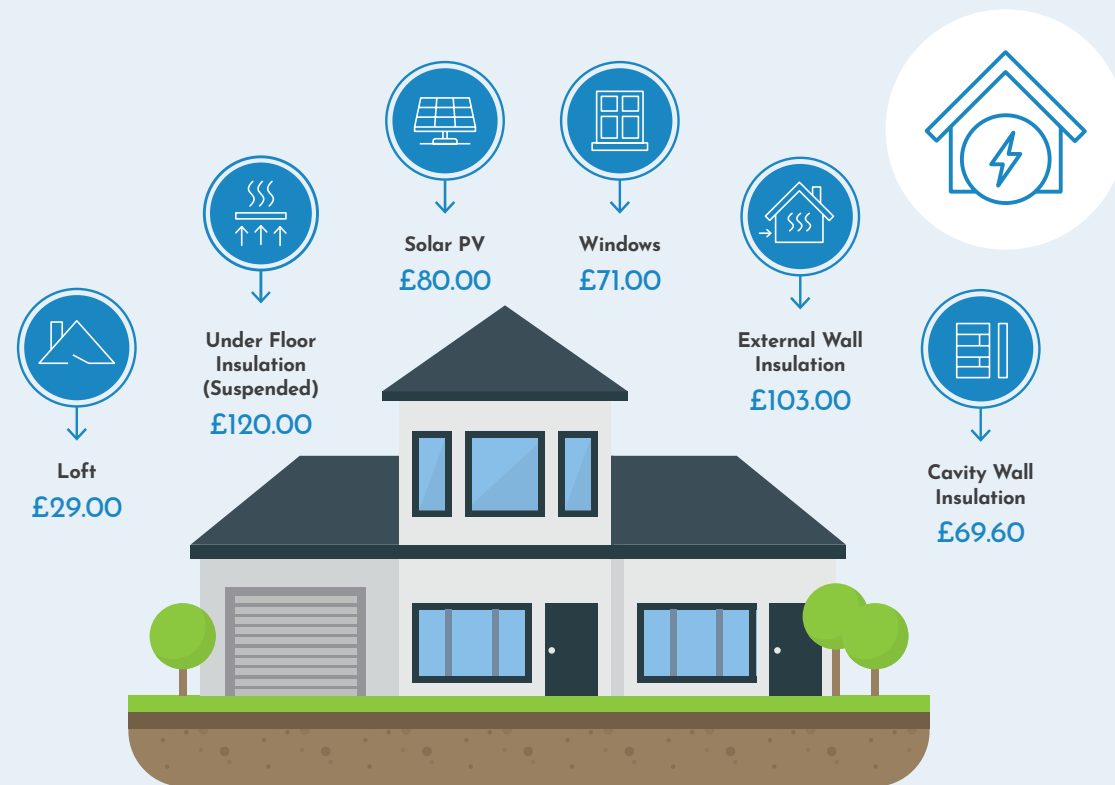
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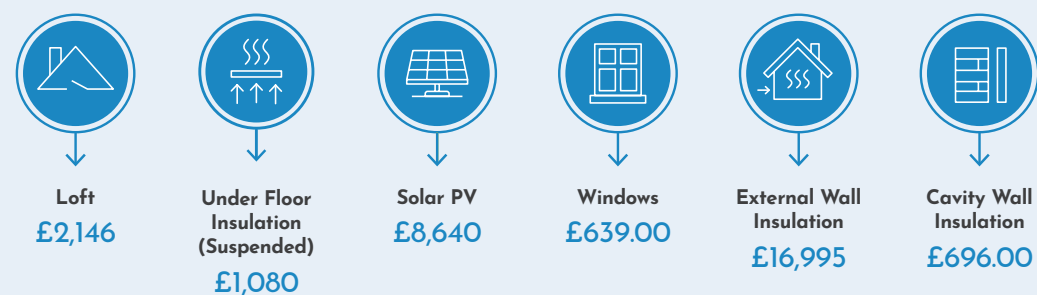
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LAD3 SAVINGS

POTENTIAL HOUSEHOLD FUEL COST SAVINGS (YEARLY SAVINGS TO THE HOMEOWNER)



POTENTIAL ANNUAL FUEL SAVINGS ACROSS LAD3*



OVERALL POTENTIAL ANNUAL ENVIRONMENTAL IMPACT

Across LAD3 contract we have made potential annual carbon savings of 743 tonnes of CO₂.

PER PROPERTY POTENTIAL ANNUAL ENVIRONMENTAL IMPACT

Average annual carbon savings of 2.11 tonnes of CO₂ per property.

*based on all measures being completed in one property

THE PEOPLE BEHIND THE SCHEMES

Sefton Council

A small retrofit team was created to deliver this new programme on behalf of Sefton Council. This included staff seconded from corporate energy, domestic energy, climate change and finance. The team worked closely with the Liverpool City Region Combined Authority staff and the main contractors.

The team have been working to contact all residents who have had work completed to offer support on behavioural change and offer simple advice on saving energy. They continue to work with the Council's Affordable Warmth team to support residents who might need additional help.

One of the key ongoing issues faced is that some residents have been unable to be serviced within these schemes due to demand far exceeding the availability of resources. In some cases, eligible residents have now been contacted and referred to the HUG2 scheme available within the LCR going forward.



The Liverpool City Region Combined Authority housing partnerships team successfully manages the scheme's reporting and coordination for the whole of Liverpool City Region, including Sefton. Staff have regular dialogue with members of this team to ensure that reporting to the Department for Energy Security & Net Zero is correct and carried out in a timely manner.



Established in 2012, Ecogee is a leading energy and construction firm that provides green energy solutions across the North West. Ecogee is extremely passionate about doing everything it can to help the fuel poverty crisis and has worked with Sefton Council on several government funded schemes to date, including the Home Upgrade Grant (HUG), LA Flex scheme and now the Local Authority Delivery (LAD) scheme. In September 2021, Ecogee was introduced to the retrofit team at Sefton Council to successfully deliver LAD2 before beginning work on LAD3.



Established in 2016, Next Energy is one of the UK's leading renewable energy, insulation and heating specialists. Based in Prescot, we specialise in turnkey retrofit delivery across the full spectrum of fabric and renewable heating installation measures. We are PAS2030 certified, and Trustmark verified, delivering all works per our ISO9001-accredited Quality Management System and providing all relevant certification & guarantees. Our commitment to quality is the bedrock of our business, which is crucial in ensuring measures installed maximise benefit to the resident in terms of increased comfort and reduced fuel usage with no unintended consequences. Between March and July 2022, we provided a full turnkey solution for Sefton Council via Local Authority Delivery (LAD) 3, covering the lifecycle of PAS2035 roles from advice & assessment to coordination/design/installation/evaluation

NEXT STEPS

In 2021, the UK government published its Net Zero strategy, setting out a pathway to reaching net zero greenhouse gas emissions by 2050. Here in the Liverpool City Region, that Sefton are part of, leaders have committed to an even more ambitious target of being net zero by 2040. This means that there is a huge task ahead in the region to retrofit most of its 720,000 homes. This is just the beginning of working towards the national target for all homes to attain an Energy Performance Certificate (EPC) of Band C by 2035.

Sefton Council and partners are committed to combatting fuel poverty in the North West as well as helping to reduce greenhouse gas emissions (1/3 of the regions' carbon footprint

is from domestic homes). We want to continue to work on improving energy efficiency in low-income homes by installing energy-saving measures.

Sefton Council would welcome future local authority led grant schemes such as Green Homes Grant Schemes to enable us to support residents and contribute towards the regional and national net zero targets. The council has demonstrated that it can effectively manage and deliver retrofit programmes and has an appetite to deliver more in future.

