Retrofit Bruton and Cary nine-month progress report

Project title	Retrofit Bruton and Cary ('Bruton and Castle Cary area retrofit' on the application form)
Project type	Lower carbon demand and consumption

Summary of activity

The project has been steered since inception by a project working group, with membership from the Centre for Sustainable Energy ['CSE'], an expert resident and South Somerset district council. The involvement of CSE has ensured that an appropriate level of expertise was brought to the recruitment process and has also provided professional support to the Retrofit Co-ordinator as necessary. The project covers the Castle Cary area, but Castle Cary town council has not supported the project financially (as was expected at the time of application) and so is not a governance partner.

The project started later than planned (because of the delay in announcement of the fund's first tranche, delay in receipt of fund terms and conditions and our recruited staff commitments to their previous employer). Our Retrofit Co-ordinator started in September 2021, and a part-time Project Officer in late November 2021. This later start will lead to a later project end-date, not a reduction in service.

More details of project activity are given in the following section. Early action has focused on service design and publicity. The service to homeowners commenced in October 2021. Engagement with contractors is planned to commence in early 2022.

Actions and outcomes

Publicity and engagement

A dedicated website has been established as the project's 'front door' (retrofit.brutontown.com). The service has been publicised via social media, local parish magazines, letters to all neighbouring parishes and talks to Bruton and Castle Cary town councillors.

Home surveys

This level of publicity has generated the expected interest in the project. At time of writing:

- 599 visits have been made to the website, by 339 separate visitors
- 21 homeowners have registered for a home survey
- 12 surveys have been carried out
- 12 condition reports have been written

- 3 retrofit plans have been completed

Contractors' engagement

The Project steering group has decided to commence contractor engagement at the point where there is enough demand for work to create a market. This is expected to be early in 2022.

Other engagement

The Project has attracted considerable interest:

- Presentation at the Levels Climate Action Forum
- Bradfords (builders' merchants) have shown great interest and support, and are using the co-ordinators' expertise to develop a range of appropriate supplies for retrofitting
- The project has been the subject of a publicity film prepared on behalf of the County Council to promote its Climate Emergency Fund
- Our Retrofit Co-ordinator has been interviewed by Naga Munchetty on BBC Radio 5 Live
- The project is hosting SSDC's recently purchased thermal imaging cameras, for use by the project and loan to other parish councils

Project specific conditions

a) *The Recipient shall work together with Frome Town Council to share best practice, identify opportunities for economies of scale and collaborate to maximise the efficiency, economy, and effectiveness of the respective projects:*

   Following the award of our grant, we have met quarterly with Frome town council to share learning, and our retrofit co-ordinator has presented at a Frome community event.

c) *The Recipient shall provide, on or after the date which is nine months after the commencement of the Project, a report to Funder setting out progress of the Project:*

   This report.

d) *The Recipient agrees that this project will act as a pilot, and as such agrees to share the outputs and outcomes of the project with Funder to inform potential future activity*

   Agreed. Project members have joined the Community Renewal Fund Retrofit Accelerator project (being led by Frome town council and Mendip district council) so our early learning is already informing future Somerset-wide activity.

Impact and benefits

The impact of retrofit on carbon emissions is dependent on the improvements recommended by our Co-ordinator being implemented by homeowners. Work has started following one of our retrofit assessments, but most building work has a substantial lead-in and completion time, so we expect to see impacts towards the end of the project and after it finishes rather than at this stage.

Learning points

1. The prediction that there would be a homeowner market for impartial professional advice about how to improve properties has been proven correct. There is more than enough work for one Co-ordinator in the area for the foreseeable future.
2. The project has been very timely. There is rapidly developing interest in retrofit and better home insulation, and we have seen interest from local architects as well as major building suppliers.
3. Despite this interest, the project has been surprisingly difficult to 'sell' politically. The urgent need to retrofit almost all the existing housing stock is widely understood scientifically but has not yet become part of everyday conversation. In targeting the able to pay market the council does not appear to be doing anything to help the less well off, and some have found this difficult to understand.
4. The project team has struggled with whether and when to charge for aspects of the service, and how much to charge. We eventually settled on charging for properties that are significantly larger than average. There are no established market rates yet.
5. A local approach appears to be working. We can get into the fine detail of our housing stock and its construction, publicise what we are doing, and use word-of-mouth constructively in a way that is very difficult at a county or district level.
6. In Bruton at least, we have discovered that there are many estate homes of mixed tenure built between 1930 and 2000 that do not have even basic levels of insulation. As an example, in a Bruton estate constructed between 1978 and 1982, 25 of its 43 properties were observed to have no cavity wall insulation. The energy and carbon-saving potential is huge. Unless this is addressed, large-scale fuel poverty lies ahead (given the expected energy price rises).
7. This project can and will play a role in awareness-raising but cannot meet the needs of those who are unable to pay. (We describe in the Next Steps section below the targeted actions we propose to take for this group).
8. The project cannot awareness-raise when the national policy remains inconsistent. At present the two available schemes for those who cannot afford to pay to retrofit their homes (the LADS 2 scheme and the Energy Company Obligation) both expire on 31 March 2022. With just 11 weeks to go it is not known what is to replace them.
9. The work of our Retrofit Co-ordinator has been seriously impeded by the lack of a single suitable software solution to support their work. This need was not understood at the project design stage. It has led to delays in her being able to produce retrofit plans. This point requires detailed explanation (9-11 below), as it is critical that it is understood when initiating any similar project.
10. The Co-ordinator needs to have access to, interact with, lodge and manipulate information in the national EPC database, so as to be able to provide accurate projections of the potential energy and carbon savings associated with specific home improvement measures. Critically, for the 'able to pay' market, she also needs to be able to pass this information on to the homeowner in an attractive and intelligible way.
11. These interactions are managed (and the savings calculated) by proprietary software using a standard national methodology (RdSAP, with the data extracted into SAP 2012). This is an emerging market, but currently there appear to be only two classes of software available:
    a. There are systems set up to service the 'volume' market for social housing and LADS 2. Elmhurst is the best known. In this market, it's important that

the assessor, contractor and co-ordinator have access to the data and plans, but there is no facility to produce a user-friendly report for the householder, as the householder is not the client.

b. There are also systems available for the medium-large scale third sector market, which do generate reports for homeowners. Parity Projects (Oxfordshire, Sussex and many London Boroughs) and Carbon Co-op (Greater Manchester, CSE) are examples. These systems are only available at district council or larger geographical level. Their price is prohibitive for a project of this size (Parity charge £12k for the first year and £4k for subsequent years for a district).

12. Our co-ordinator uses Elmhurst software to interact with the national database. She and the project officer have had to put a lot of time and energy into developing their own report template. Their workaround will not be reproduceable by or useful for other similar projects, which will face similar challenges. There is potentially a role for principal authorities (or the SW Energy Hub) to support the roll-out of retrofit for the able to pay market by purchasing and making a suitable system available across the County.

Next steps

Support for those unable to afford the cost of improvements

We are attempting to liaise with E.on and Happy Energy (the local LADS 2 suppliers) to ensure that any free capacity they may have is taken up in the project area and not wasted.

Targeting

We are collating data so as to be able to offer targeted door-to-door publicity campaigns once details of the replacement for the LADS 2 and Energy Company Obligation schemes are known. We will do this in those estate homes described above which lack basic insulation. Those who can pay will be offered a retrofit assessment. Those not able to pay will be referred to the replacement scheme. We hope that this targeted approach will help address local fuel poverty and allow a substantial number of homes to be improved at relatively low cost.

Contractor engagement

Using the local knowledge and personal connections of our project group, we will be reaching out to small and medium sized local contractors in early-mid 2022, when we have a sufficient volume of demand to create a market.

Other engagement

We will continue to develop links with local architects (likely to become involved in the design phase of any improvements). We also plan to engage with local estate agents: many purchasers undertake improvement work on their new property. Early engagement with retrofit will be a way to avoid expensive errors being made and ensure that retrofit plans become part of the home-buying process.

Our core ‘offer’

Our co-ordinator has been asked to concentrate on retrofit assessments and plans at present. A retrofit plan does nothing to address CO_2 emissions unless it is put into action. The ‘retrofit journey’ also includes the design, co-ordination and evaluation of installed improvements. We will review our local market’s response to the demand created by our retrofit plans, and we may then decide to re-allocate some of our co-ordinator’s time to the later stages of the journey.

Legacy

With current funding the project will end in early to mid 2023. Our co-ordinator is just scratching the surface of what needs to be done. If she concentrates mainly on assessments and plans, it is likely that she can assess around 100 properties per year. At this rate it would take 10 years to assess and retrofit Bruton's housing stock alone. The project group has started to discuss how retrofit can continue in Bruton (and elsewhere), as it will need to if emissions reduction targets are to be met. It is too early in the project's life to make recommendations, but in a rural area a local focus is looking to be helpful.

Councillor James Hood, project lead, Retrofit Bruton and Cary
Zöe Godden, Town Clerk, Bruton town council
21 January 2022