

Hertfordshire Local Retrofit Strategy 2025 to 2028

Spring 2025

The Appendix

To maintain clarity and focus within [Hertfordshire Local Retrofit Strategy](#) document, details on developing the Strategy through LARA, and how key principles and outcomes were developed, have been moved to this Appendix. This section provides transparency on stakeholder engagement, methodology, and decision-making processes as well as an indicative direction to aid the development of action plans, budgets and planning for next steps.

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1. The LARA Pilot

1.1. Introduction

- 1.1.1. This Strategy came from a series of workshops and working groups attended by stakeholders involved in retrofit within Hertfordshire. The Pilot team, consisting of experts in systems change ([Dark Matter Labs](#)), community engagement ([Collaborate CIC](#)) and the retrofit landscape ([MCS Foundation](#)) carried out research to help inform decisions and facilitated conversations enabling the Strategy to emerge. [Hertfordshire Climate Change and Sustainability Partnership](#) (“HCCSP”) were the lead organisation for the process. The Pilot team worked closely with HCCSP from the start. An extensive list of stakeholders was developed with HCCSP. Interviews were held with a sample of stakeholders and findings were combined with desk-based research to build a picture of the area, the Locality Assessment. This then guided work at the first workshop to develop a Shared Understanding of how things were working currently. From this the attendees started to develop themes for a vision. This was then honed by one of the working groups (self-selected, smaller groups of workshop attendees, getting together between workshops) and approved at the next workshop. Once the vision was in place the stakeholders could start to develop the goals and actions needed. Importantly, they also agreed on the shared principles needed to ensure they can work together and achieve the vision.
- 1.1.2. A systems approach is a way of thinking about problems and solutions by considering the entire system, rather than just individual parts. It's a holistic and interdisciplinary method that emphasises how different elements interact. The Pilot also aimed to take a place-based approach, that is an approach using a collaborative process to address the needs of a community by working together to improve the quality of life. It involves understanding a place's social context and physical setting. In this context the place was Hertfordshire and stakeholders from across the retrofit system in Hertfordshire were invited to co-develop the Strategy.
- 1.1.3. The Strategy has the following defined terms:
- **ACTIONS: Things done** by people and organisations in Hertfordshire in support of goals, by individuals or groups
 - **GOALS: Something Hertfordshire hopes to achieve** which is formed of multiple actions and achieved by multiple parties
 - **MISSION: How the work** needed to achieve the vision will be taken forward
 - **OUTCOMES: The result of something**, or the consequence of it, is the outcome
 - **STRATEGY: A plan** for Hertfordshire made up of multiple goals (under which sit actions) toward a wider mission and vision
 - **VISION: One sentence that describes the future-facing, longer term ambition** of the Strategy and offers inspiration and motivation
- 1.1.4. The Pilot was funded and led by The MCS Foundation which is a charity working to decarbonise all homes in the UK. The Pilot has been delivered in partnership with Ashden, National Retrofit Hub, Greater Southeast Net Zero Hub and the UK Green Building Council. The Pilot team would also like to thank UK Green Building Council, who supported the workshops held in Hertfordshire. The workshops were designed by Dark Matter Labs and Collaborate CIC and delivered by The MCS Foundation and Collaborate CIC.

Organisations Represented:

Over 100 stakeholders took part in this project representing over 60 organisations across three workshops. This includes local authorities, Hertfordshire Futures, training colleges and institutions, private landlords and social landlords, community groups, local organisations responsible for supporting heritage areas (such as [Letchworth Heritage Foundation](#) and [Welwyn Garden City Estate Management Scheme](#)), contractors responsible for building and retrofit work (including technical low emission installers and general construction companies with retrofit expertise), and energy advice charities:

Ashden	Grand Union Community Energy	Oaklands College
Black Architecture		PyramidEco
Braughing Old Boys School Community Trust	Greater South East Net Zero Hub	Sawbridgeworth Town Council
Braughing Parish Council	Green Heat Coop	Settle Housing Group
Broxbourne Council	HCCSP	St Albans City and District Council
Carbon Rewind Ltd	Hertford Regional College	Stevenage Borough Council
Centre for Ageing Better	Hertfordshire County Council	Sustain Homes
Clarion Housing Group	Hertfordshire Futures	Three Rivers District Council
Dacorum Borough Council	Hertsmere Borough Council	Thrive Homes
E.ON Energy	Knebworth Environment Group	University of Hertfordshire
East Herts District Council	Letchworth Garden City Heritage Foundation	Wates
Education for a Sustainable Future	LGA	Watford and Three Rivers Friends of the Earth
EELGA	Multiverse Consultants	Watford Borough Council
Energy Saving Trust	NEF	Welwyn Hatfield Borough Council
Envol Labs	North Herts & Stevenage Green Party	West Herts College
Estu Global	North Herts Council	

2. Vision and Mission

2.1. Introduction

- 2.1.1. Work on the vision started during workshop one. Please see the [workshop report](#) for more information.
- 2.1.2. The vision exercise revealed several key themes shaping individual and organisational aspirations. These included achieving a net-zero Hertfordshire, fostering innovation, ensuring equity, financial and business sustainability, adaptability and resilience, and strengthening partnerships. Stakeholders emphasised the importance of inter-generational justice, affordable warmth, and community-centred approaches. The discussion then shifted to how stakeholders are already working together and how collaboration could be improved, focusing on spheres of influence. Councils can facilitate change through grants, policymaking, planning, multi-agency initiatives and as landlords, while businesses can influence customer demand, skills development, and investment in growth and new technologies. To enhance collaboration, participants recognised the need to work together on accessing funding, data sharing, building consumer trust, and connecting and growing supply chains.
- 2.1.3. A working group was set up to refine the vision. The working group drafted a vision statement that was reviewed and revised during Workshop two. Participants proposed an amendment to separate the statement into a vision and a mission. The agreed upon vision statement was: *“Every home is fit for now and for our future,”*. The mission statement says: *“Collaborating in Hertfordshire to retrofit homes in need, so that we enhance our environment and climate resilience, address fuel poverty, improve health and support local jobs.”* Following a voting system, the group adopted the vision and mission. Please see the [workshop report](#) for more information.

3. SWOT

3.1. Introduction

3.1.1. The SWOT was developed over several phases. The Pilot team conducted qualitative and quantitative research published in the Locality Assessment with data gathered through desk-based research and stakeholder interviews. The Locality Assessment informed the workshops, particularly the Shared Understanding and set a baseline understanding of Hertfordshire's retrofit system. [The Locality Assessment report](#) details specific geographic and demographic information about the locality. It also provides insight into activity within the locality in relation to six pillars of a retrofit system¹. The 'six pillars' are a tool to understanding a system as follows:

- Community:
 - Awareness and appetite for retrofitting from residents
 - Trust building
 - Participation & engagement
- Skills and Training:
 - Market size and quality of works
 - Range of different programmes, tenures & building typologies
 - Skills pipeline needed for future works
- Homes:
 - Building types and tenures across the area
 - Approach to the carbon and energy saving
- Low carbon technology:
 - Heat pump 'readiness'
 - Energy generation & storage
 - Planning & infrastructure e.g. grid constraints
- Financial resourcing:
 - Funding and finance
 - Variations across tenures & delivery models
 - Impacts on quality retrofit works e.g. user-centred service models
- Governance
 - Ownership and governance
 - Procurement policy e.g. community wealth building

3.1.2. After Workshop one, the Shared Understanding Working Group met to start creating and refining a SWOT based on the Locality Assessment and outputs from the workshop. This was presented during Workshop two, and highlighted the county's strengths in collaborative networks, green skills programmes, and successful grant funding, while finding challenges such as resource limitations, skills gaps, and public hesitation. Opportunities included

¹ A process developed by [Dark Matter Labs](#)

community engagement, local supply chains, and collective purchasing, counterbalanced by threats like funding uncertainty, supply chain constraints, and regulatory delays. This was reviewed and revised by the group and a revised SWOT put to stakeholders for approval, with 98% of stakeholders agreeing with the final document.

3.2. Strengths

3.2.1. Strength 1: Collaborative networks and established governance

- Further information: Partnerships and governance already exist through HCCSP. Shared learning and alignment of county-wide goals. Collaboration opportunities through existing partnerships
- Response: Build on through [action 4.1 A](#) and [action 4.1 B](#)

3.2.2. Strength 2: Established green skills programme

- Further information: Training providers are ready and waiting for students and trainers
- Response: Build on through [action 3.2 A](#), [action 3.2 B](#) and [action 3.2 C](#)

3.2.3. Strength 3: Previous experience establishing pilot projects

- Further information: Development of retrofit projects, e.g. Greener Homes, and participation in LARA pilot
- Response: Take experience into delivery of Strategy and particularly [action 1.1 A](#), [action 1.1 B](#), [action 1.1 D](#), [action 1.2 A](#), [action 2.1 A](#), [action 4.1 B](#)

3.2.4. Strength 4: Mixed populations, rural and urban

- Further information: Provides a good testing ground for different delivery models with large urban populations providing opportunities for large scale retrofit programmes or Heat Networks
- Response: Can be utilised for [action 1.1 B](#) and [action 1.2 C](#)

3.2.5. Strength 5: High level of home ownership & affluence

- Further information: Good opportunity to test private funding models and opportunity to market retrofit projects to homeowners
- Response: Can be utilised by [action 1.1 A](#) and [action 1.1 E](#)

3.2.6. Strength 6: Similar housing archetypes in specific locations

- Further information: Housing tends to be built at scale in certain periods and locations e.g. Garden cities have very similar property types, making mass retrofit potentially less complex
- Response: Can be utilised by [action 1.1 A](#), [action 1.1 E](#) and [action 1.2 A](#)

3.2.7. Strength 8: Proven track record of attracting grant funding

- Further information: Councils and consortia successful in securing LAD and HUG funding under all rounds
- Response: Can be utilised across Strategy but particularly by [action 1.2 B](#) and [action 1.3 A](#)

3.2.8. Strength 9: Recognition of the climate emergency and political will

- Further information: N/A

- Response: Will support Strategy delivery and be supported by [action 2.2 C](#) and [action 2.3 A](#)

3.2.9. Strength 10: Established industry leaders e.g. GSK

- Further information: N/A
- Response: No specific actions but needs to be utilised by [action 4.1 A](#)

3.3. Weaknesses

3.3.1. Weakness 1: Lack of objective priorities

- Further information: Range of options leads to potential for scattergun and disconnected approaches, potentially contradictory and/or unsuccessful
- Response: Strategy directly responds to weakness and supported by [action 4.1 A](#) and [action 4.2 A](#)

3.3.2. Weakness 2: Lack of retrofit strategy

- Further information: The absence of a formal Hertfordshire retrofit strategy limits clear direction and coordinated county-wide action on retrofitting, creating uncertainty in planning and project prioritisation
- Response: Development and endorsement of the Local Retrofit Strategy and managed going forward through [action 4.1 A](#)

3.3.3. Weakness 3: Limited resources and capacity

- Further information: Capacity constraints within local authorities could hinder the ability to deliver retrofit initiatives at the necessary scale
- Response: [action 4.1 A](#) aims to deliver central capacity to coordinate and deliver whilst facilitating others

3.3.4. Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes

- Further information: N/A
- Response: Mitigated in part through demand development actions sitting under goal 1 but also directly through [action 3.1 C](#) and [action 3.2 D](#)

3.3.5. Weakness 5: Collaboration between all stakeholders could complicate project oversight if governance, roles, and responsibilities aren't clearly defined, especially in the absence of a guiding strategy

- Further information: N/A
- Response: To be mitigated through the Strategy itself and [Shared Principle 1](#) but also [action 4.1 A](#), [action 4.2 A](#) and [action 4.3 A](#)

3.3.6. Weakness 6: Limited stakeholder engagement and lack of public understanding

- Further information: Public and stakeholder understanding of retrofitting, especially around its adaptation benefits, may be limited, requiring further education and engagement efforts
- Response: Mitigated for the public through [action 1.1 A](#), then reporting on performance via [action 2.2 C](#) and [action 2.3 A](#), policy support via [action 4.3 A](#) and for stakeholders through engagement via [action 4.2 A](#)

3.3.7. Weakness 7: Procurement reticence

- Further information: Anxiety in public sector around risk, responsibility, and reputation, preventing 'preferred' suppliers being shared beyond LA organisations. Need for procurement to be inclusive of government legislation.
- Response: Mitigated through [action 2.1 A](#)

3.3.8. Weakness 8: Skills shortage and limited installation capacity

- Further information: The existing workforce is not equipped to meet the scale of retrofitting required (c. 500k homes by 2050)
- A lack of knowledge in the construction, materials and behaviour of traditional (pre-c.1919) buildings – approximately 25% of UK homes – may result in inappropriate retrofit interventions which can cause long term damage.
- Response: Mitigated in part through demand development actions sitting under goal 1 and supply actions under [goal 3.1](#) and [goal 3.2](#)

3.3.9. Weakness 9: Higher than national average of listed and conservation (heritage) properties

- Further information: Could make retrofit programmes more complex, expensive and take longer to deliver
- Response: Possibly mitigated in part through [action 4.1 D](#) but needs monitoring as affects a number of actions such as [action 1.1 A](#) and [action 2.2 D](#)

3.3.10. Weakness 10: Limited numbers of community energy groups and not seen as a partner

- Further information: N/A
- Response: To be mitigated through [action 4.2 A](#) and possibly [action 4.1 A](#) but could be key to successful delivery of [action 1.1 A](#) and [action 1.1 B](#)

3.3.11. Weakness 11: Colleges ready but not getting students

- Further information: Training providers not getting demand for retrofit courses
- Response: Mitigated in part through demand development actions sitting under goal 1 but specifically via [action 3.1 C](#) and [action 3.2 D](#)

3.3.12. Weakness 12: Policy environment and communication from government

- Further information: Lack of short and long term supportive national policy and awareness campaigns supplemented by inconsistent communication when initiatives are launched.
- Response: Government policy sits outside of the Strategy's scope but may be mitigated through actions sitting under [goal 1.1](#), increasing consumer confidence through actions sitting under [goal 3.1](#) and [goal 3.2](#) and specifically [action 4.3 A](#)

3.3.13. Weakness 13: Lack of confidence in technology, installation quality and trusted and knowledgeable local intermediaries

- Further information: N/A
- Response: Mitigated through actions sitting under [goal 1.1](#), [goal 3.1](#) and [goal 3.2](#)

3.3.14. Weakness 14: Lack of public/householder demand

- Further information: N/A

- Response: Mitigated through actions sitting under [goal 1.1](#), [goal 1.2](#) and [goal 1.3](#)

3.3.15. Weakness 15: Lack of show homes and other visible/accessible opportunities to see tech in person

- Further information: N/A
- Response: Could be mitigated through specific actions as part of [action 1.1 A](#) and [action 1.1 B](#)

3.4. Opportunities

3.4.1. Opportunity 1: Strategy development

- Further information: The opportunity exists to develop a county-wide Hertfordshire retrofit strategy, informed by local pilots, like the LARA project, and national climate priorities
- Response: Development of the Local Retrofit Strategy and specifically [action 4.1 A](#) to guide and ensure delivery of the [vision](#) and [goal](#)

3.4.2. Opportunity 2: Funding availability

- Further information: Strong collaborations through HCCSP's stakeholders could help secure and leverage potential and existing funding for retrofitting initiatives, enabling broader reach and more impactful results across both public and private buildings
- Response: Realisation specifically through [action 4.1 A](#) and actions under [goal 4.1](#) and [goal 4.2](#)

3.4.3. Opportunity 3: Innovation and knowledge sharing

- Further information: Programmes like LARA offer opportunities to co-create solutions and share knowledge across sectors, boosting the effectiveness of retrofit projects. Herts Insight as a portal for aligning better data will help stakeholders reach aligned conclusions for action.
- Response: To be utilised by [action 4.1 A](#), and actions sitting under [goal 4.2](#) and [goal 4.3](#)

3.4.4. Opportunity 4: National and local policy alignment

- Further information: Hertfordshire's commitment to green growth and climate resilience aligns with UK government priorities, which may attract policy incentives or increased funding
- Response: To be utilised by [action 4.1 A](#), [action 1.2 B](#) and [action 1.3 A](#)

3.4.5. Opportunity 5: Local job creation

- Further information: Aligning ambition with a consistent work programme could help provide market stability and confidence to improve and keep workforce in the local area
- Response: To be utilised by actions sitting under goal 1 and mitigated through [action 2.1 A](#) and [action 4.2 B](#)

3.4.6. Opportunity 6: Leverage co-benefits through aligned procurement

- Further information: Appetite for aligned procurement approaches proven through [Regional Climate Change Forum](#) procurement working groups and Supply

Hertfordshire, with a possible undertaking for a countywide procurement charter to help align ambition for a sustainable supply chain

- Response: To be realised through [action 2.1 A](#) and supported by [action 4.1 C](#)

3.4.7. Opportunity 7: Skills training and career development for young people

- Further information: N/A
- Response: To be realised through actions under goal 3

3.4.8. Opportunity 8: Working with local communities

- Further information: N/A
- Response: To be realised through [action 1.1 C](#)

3.4.9. Opportunity 9: Decentralise electricity grid and develop renewable heat networks

- Further information: N/A
- Response: Not specifically realised through actions but could well be part of response coming out of [action 1.1 B](#), [action 4.3 A](#) and [action 4.3 B](#)

3.4.10. Opportunity 10: Mobilise the repair and maintenance industry

- Further information: N/A
- Response: To be realised through demand-side actions sitting under [goal 1.1](#), [goal 1.2](#) and [goal 1.3](#) and [action 3.1 A](#) and [action 3.1 B](#)

3.4.11. Opportunity 11: Engage health professionals and align to health and social care objectives

- Further information: N/A
- Response: Realised through [action 2.2 A](#) and [action 4.3 A](#)

3.4.12. Opportunity 12: Group buying

- Further information: N/A
- Response: To be realised through [action 1.2 A](#)

3.4.13. Opportunity 13: Retrofit as a springboard to encourage behaviour change

- Further information: N/A
- Response: No directly related action but feeds into [action 2.2 A](#)

3.4.14. Opportunity 14: Partnering with private investment

- Further information: N/A
- Response: No directly related action but feeds into [actions](#) sitting under [goal 1.2](#)

3.4.15. Opportunity 15: Local government reform

- Further information: Following the [English Devolution White Paper](#) outlining plans for local government reform, changes in funding and powers at a local level could affect mandate and resources to effect change in the county.
- Response: To be monitored by output from [action 4.1 A](#)

3.5. Threats

3.5.1. Threat 1: Funding gaps or uncertainty

- Further information: Uncertainty around funding availability for retrofitting could delay projects or reduce their scope, securing continuous financial support is critical
- Response: To be managed by output from [action 4.1 A](#)

3.5.2. Threat 2: Funding bodies changing priorities

- Further information: Choice to follow the funding or develop a strategy that can stand alone, waiting for relevant funding to develop.
- Response: To be managed by output from [action 4.1 A](#) and an endorsed Local Retrofit Strategy

3.5.3. Threat 3: Capacity strain

- Capacity within local authorities could be overstretched, particularly as collaboration increases in scale and complexity. Capacity will also be challenged by potential challenges of local government reform.
- Response: To be managed by output from [action 4.1 A](#) and collaborative working facilitated through [action 4.2 A](#) and endorsement of [Shared Principle 1](#).

3.5.4. Threat 4: Regulatory and policy delays

- Further information: Delays in policy and shifts in direction cause uncertainty and slower progress
- Response: Mitigated through endorsed Local Retrofit Strategy and development of local market using actions under goal 1 and goal 3

3.5.5. Threat 5: Urgency of Climate Impact Response

- Further information: Shift of focus away from long-term retrofit plans, with resulting negative impacts on fuel poverty, carbon emissions, thermal comfort, intergenerational equality, health and wellbeing and other interrelated impacts of inaction.
- Response: An important threat, particularly to potentially long-term initiatives such as action 1.1 B, that needs to be managed by output from [action 4.1 A](#) and data from [action 2.2 C](#) and [action 2.3 A](#)

3.5.6. Threat 6: Ability to conduct housing stock analysis

- Further information: Although potential sources of housing data exist (e.g. Herts Insights, Parity Projects, etc) these rely on knowledge and capacity to be able to create meaningful analysis and alongside an understanding of the right data queries. More detailed and accurate housing stock analysis relies on specific budget: but difficult to know whether the cost/benefit analysis aligns.
- Response: To be managed by output from [action 4.1 A](#) and collaborative working facilitated through [action 4.2 A](#) and endorsement of [Shared Principle 1](#), impacts on [action 1.3 B](#)

3.5.7. Threat 7: Difficulties in developing the workforce

- Further information: Loss of younger people in the workforce to neighbouring (cheaper) counties and London
- Response: To be mitigated through demand-side actions sitting under [goal 1.1](#), [goal 1.2](#) and [goal 1.3](#) and [action 3.1 A](#) and [action 3.1 B](#)

3.5.8. Threat 8: Supply chain constraints

- Further information: High demand for materials and technologies could lead to supply shortages
- Response: To be managed through [action 4.2 B](#)

3.5.9. Threat 9: Poor public perception and engagement in retrofit

- Resistance or apathy towards retrofitting due to financial, disruption and trust barriers
- Response: To be managed through [action 1.1 A](#), [action 1.2 B](#) and [action 1.3 A](#)

3.5.10. Threat 10: Liabilities from consortia and risk averse councils

- Further information: N/A
- Response: Key risk to be mitigated through output from [action 4.1 A](#) and an endorsed Local Retrofit Strategy with agreed [Shared Principles](#)

3.5.11. Threat 11: Energy pricing uncertainty and volatility

- Further information: N/A
- Response: Threat sits mainly outside of the Local Retrofit Strategy's scope but [action 1.1 A](#) will provide a response

3.5.12. Threat 12: Politicisation of climate change conversation

- Further information: N/A
- Response: To be understood more but [action 1.1 B](#) and [action 1.1 C](#) is in response, in part, to this Threat

3.5.13. Threat 13: Poor quality work undermines trust and confidence

- Further information: N/A
- Response: To be mitigated through actions sitting under [goal 3.1](#) and [goal 3.2](#)

3.5.14. Threat 14: Devolution process derails agendas

- Further information: N/A
- Response: To be managed by output from [action 4.1 A](#) and collaborative working facilitated through [action 4.2 A](#)

4. Principles

4.1. Introduction

- 4.1.1. During workshop two, participants engaged in a systems simulation game to explore principles and strategies for collaborative retrofit initiatives in Hertfordshire. The exercise highlighted challenges such as siloed actions, lack of coordination, and minimal strategic oversight in Round 1. This evolved into greater collaboration, shared goals, and efficient resource use in Round 2. Groups then used this learning to reflect on real-life changes they want to see in Hertfordshire's retrofit system.
- 4.1.2. Key principles for a better retrofit system were identified, including equity, sustainability, collaboration, and accountability. Priorities found included shared vision, workforce upskilling, community engagement, targeted funding, and innovative financing models. The follow-up discussions emphasised leveraging local resources, fostering partnerships, and applying insights to real-world challenges to drive systemic change and accelerate retrofitting efforts effectively.
- 4.1.3. These shared principles will guide all activity by signatories to the Strategy. The governance agreements between signatories to the Strategy will formally ensure their importance. The principles below have influenced the goals and actions and are critical in achieving the vision.

4.2. The principles

4.2.1. Principle 1: Work together

- Principle of collaboration and partnership working which may require commitments to fairness, honesty, equity, clear lines of accountability with risks shared
- "Collaboration is key, as we are stronger together"
- "A collaborative approach to resource allocation ensures that no region or group is left behind"

4.2.2. Principle 2: Evidence led

- Principle to ensure, wherever, possible that actions are based on evidence, data is gathered, and actions are evaluated to enable a sense of purpose
- "Generate enough activity to create learning in the market and improve over time"
- "Incremental progress ensures that strategies evolve and adapt as lessons are learned"

4.2.3. Principle 3: Sustainably minded

- Principle that solutions must balance and understand their environmental, economic, and social value whilst maximising local benefit
- "Solutions must balance environmental impact, cultural relevance, the value of heritage assets and long-term financial viability"

4.2.4. Principle 4: Ambitious but Realistic

- Principle to help strive a balance between being too risk-averse and too careless which can only be done by understanding risks and collective accountability, some time aiming to optimise rather than maximise
- "Be realistic about ambitions and act on them—ambitious goals should be balanced with practical steps"

5. Outcomes, Goals and Actions:

5.1. Outcomes

- 5.1.1. During workshop one, participants engaged in a visioning exercises. The results from this have informed the development of a set of outcomes for the strategy.
- 5.1.2. Data from Locality Assessments and national best practices informed outcome priorities.
- 5.1.3. Final outcomes were tested with stakeholders to ensure relevance and feasibility.

5.2. Goals

- 5.2.1. During workshop two, participants engaged in a simulation game to explore principles and strategies for collaborative retrofit initiatives in Hertfordshire – see 5.1.1. Priorities identified included shared vision, workforce upskilling, community engagement, targeted funding, and innovative financing models. The follow-up discussions emphasised leveraging local resources, fostering partnerships, and applying insights to real-world challenges to drive systemic change and accelerate retrofitting efforts effectively.
- 5.2.2. The Pilot team then took the findings from workshop two and began drafting potential goals reflecting where stakeholders want to be, the vision, and the agreed priorities and principles. These were presented and agreed at workshop three.

5.3. Actions for each goal

5.3.1. Introduction

- 5.3.1.1. The Pilot team then took the findings from workshop two and started drafting potential actions reflecting where stakeholders want to be, the vision, and the agreed priorities and principles. These were presented, refined and agreed at workshop three.
- 5.3.1.2. Each action has the following further information:
 - CONTEXT: The problem or issue the action is planning to affect
 - APPROACH: High-level plan of how the action could be completed
 - ASSUMPTIONS: The assumptions are we making to justify the desired action
 - RESOURCES: Estimated resources needed to deliver the action: these are indicative costs to assist with planning, funding and prioritisation and will be subject to further specification, procurement processes and individual decisions by the particular working group or system actor who may be responsible for progressing that action.
 - LINKS: Any other action that needs to be completed beforehand or are strongly linked
 - STRATEGIC FIT: Which element of the SWOT and Shared Principles the action responds to and who the 'direct beneficiaries' who will see the primary benefit of the action
- 5.3.1.3. The phasing of actions will need to be determined. The Links section outlines dependencies and related actions. At this stage we recommend prioritising:
 - [Action 4.1 A](#), "Create delivery vehicle, governance and reporting structure to ensure delivery of the Retrofit Strategy involving all relevant stakeholders". This should be the first action as it enables decision-making and ensures capacity to facilitate or directly deliver actions.

- [Action 4.2 A](#), “Create stakeholder-specific forums to coordinate activity within stakeholder group (with representation from central team)”. This would be the second action as this could help distribute the workload of further actions.
- Action 2.2 C “Determine socio-economic KPIs and report on performance”. This, along with KPIs and reporting frameworks within governance and reporting structures at 4.1A, will help to keep stakeholders engaged and secure external funding

All the proposed actions are linked together because the Strategy takes a systems-based approach – retrofit involves a web of linked challenges and opportunities that need to be tackled together, not in isolation. The following diagrams shows some of the strongest links (**teal** lines) and proposed pre-cursors (**green** lines with arrow pointing to second task)



Figure 1: action linkages and order

Actions **highlighted** have been set as Priority actions by stakeholders.

Goal 1.1: Increase access to trusted advice and guidance

5.3.2. **Strategic fit** (across all goal actions):

- Weakness 12: Policy environment and communication from government
- Weakness 13: Lack of confidence in technology, installation quality and trusted and knowledgeable local intermediaries
- Weakness 14: Lack of public/householder demand
- Opportunity 5: Local job creation
- Opportunity 10: Mobilise the repair and maintenance Industry
- Threat 4: Regulatory and policy delays
- Threat 7: Difficulties in developing the workforce

5.3.3. **Action 1.1 A: Launch general support service providing advice and signposting via web, phone and email**

- 5.3.3.1. **Context:** Lack of knowledge and support is stopping citizens from carrying out retrofit measures and/or seeing benefit from said measures, can build on work by local community energy organisations
- 5.3.3.2. **Approach:** Research effectiveness of different approaches to establish *level of service* required to meet Strategy aims, potential service providers (including Hertfordshire-based organisations), secure budget, develop specification and procure delivery partner ensuring evaluation plan put in place
- 5.3.3.3. **Assumptions:**
- Provision of free bespoke advice and support will convert into action
 - Service providers are available locally/nationally who can deliver a suitable level of service
 - There is demand for local, free, one to one, retrofit and fuel poverty advice in Hertfordshire
- 5.3.3.4. **Resources:** Likely to require one or more entities to contract with a service provider and pay for service provision
- People: Project Manager, Procurement Officer
 - Money: c. £50,000 per year for external service provision
- 5.3.3.5. **Links:**
- Pre-cursor to all homeowner/ tenant support-related activity such as [action 1.1 D](#), [action 1.1 E](#), [action 1.2 A](#), [action 1.2 C](#), [action 2.2 D](#), [action 2.3 B](#)
 - Likely benefit from being in place prior to [action 1.1 B](#)
- 5.3.3.6. **Strategic fit:**
- Principle 1 Working Together: Potential for service to be acting on behalf of several stakeholders and supporting a range of local policy objectives

- Direct beneficiaries: Homeowners, tenants, local authorities, public health, supply chain
- Added-value potential through use of local contractor(s)
- Strength 3: Previous experience establishing pilot projects
- Strength 6: Similar housing archetypes in specific locations
- Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes
- Weakness 6: Limited stakeholder engagement and lack of public understanding
- Weakness 9: Higher than national average listed and conservation (heritage) properties
- Weakness 10: Limited numbers of community energy groups and not seen as a partner
- Threat 9: Poor public perception and engagement in retrofit

5.3.4. **Action 1.1 B: Pilot a place-based approach to engaging citizens in retrofit**

- 5.3.4.1. **Context:** Many residents, particularly those in fuel poverty, are not engaging with retrofit grant initiatives due to a lack of trust in providers and poor understanding of the benefits. In Hertfordshire, 7% of households are in fuel poverty, but a large proportion of households are ineligible for funding. The challenge is to engage these households in retrofit efforts too.
- 5.3.4.2. **Approach:** Research potential engagement approaches and delivery partners, identify supporting contractors, engage with community energy groups, select a pilot location, secure budget, develop project specification and procure a delivery partner(s) ensuring evaluation plan put in place.
- 5.3.4.3. **Assumptions:**
- Better outcomes are possible through approaching and meeting people 'where they are'
 - People feel decarbonisation activity is done to them and not with them
- 5.3.4.4. **Resources:** Likely to require one or more entities to contract with a service provider and pay for service provision. Stronger internal collaboration between departments will also be necessary.
- People: Project Manager, Procurement Officer, Marketing/Communications Officer
 - Money: TBC
- 5.3.4.5. **Links:**
- Likely to benefit from [action 1.1 C](#) being started or completed first
 - May require [action 2.3 D](#) to be completed first or at least initial research
 - Likely will need [action 4.1 D](#) to be completed first
- 5.3.4.6. **Strategic alignment:**
- Principle 3 Sustainably minded: Potential to provide holistic support to a locality, maximising local benefit

- Direct beneficiaries: Homeowners, tenants, local authorities, social landlords, supply chain
- Strength 3: Previous experience establishing pilot projects
- Strength 5: High level of home ownership & affluence
- Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes
- Weakness 10: Limited numbers of community energy groups and not seen as a partner
- Weakness 15: Lack of show homes and other visible/accessible opportunities to see tech in person
- Opportunity 9: Decentralise electricity grid and develop renewable heat networks
- Threat 12: Politicisation of climate change conversation

5.3.5. Action 1.1 C: Engage and develop partnerships with trusted intermediaries (including faith groups) to support delivery of goals

- 5.3.5.1. **Context:** There is distrust in grant schemes and retrofit interventions more generally and therefore activities are needed to be delivered to rebuild relationships with communities and increase rates of retrofit delivery
- 5.3.5.2. **Approach:** Conduct stakeholder mapping and assessment, research best practice, determine engagement strategy, implement strategy, and develop partnership initiatives
- 5.3.5.3. **Assumptions:**
- Use of grants hindered by lack of trust in schemes
 - Partnerships with trusted intermediaries can increase delivery of retrofit measures
 - Trusted intermediaries (consider community, cultural, faith groups as well as GPs and other trusted advocates) can be engaged
 - [ECO](#) and other grant providers find it difficult to find eligible customers
- 5.3.5.4. **Resources:** Focus will be people but when moving into the engagement and delivery phase marketing spend may be needed, specialist support may also be needed. Note at the time of writing this strategy, no stakeholders are obligated to commit resource, and no fixed implementation timelines are agreed
- People: Project Manager, Project Support Officer, community engagement specialists (TBC)
 - Money: c. £20,000 for external contractors and marketing activity.
- 5.3.5.5. **Links:**
- Precursor to [action 1.1 B](#) as potentially important in effective delivery of place-based initiative or could be incorporated
 - Likely will need [action 4.1 D](#) to be completed first
- 5.3.5.6. **Strategic alignment:**

- Principle 1 Work together: Collaborating fully with local community organisations by meeting them 'where they are' and building trust
- Direct beneficiaries: Local authorities, social landlords, ECO providers
- Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes
- Weakness 15: Lack of show homes and other visible/accessible opportunities to see tech in person
- Opportunity 8: Working with local communities, considering community, cultural, faith groups as well as GPs and other trusted advocates faith groups
- Threat 12: Politicisation of climate change conversation

5.3.6. Action 1.1 D Develop a 'Warm Homes Prescription' service facilitated by shared work on co-benefits

5.3.6.1. **Context:** Retrofit measures can deliver health benefits and with GPs being a critical part community health they can be utilised to engage those most in need

5.3.6.2. **Approach:** Conduct stakeholder mapping and assessment, research best practice, determine GP engagement strategy, consult with GPs on potential initiatives, develop business case

5.3.6.3. **Assumptions:**

- ECO providers struggle to find eligible customers but health service can
- Health service pathways can deliver customers for grant schemes and benefit stakeholders
- Retrofit measures can deliver health benefits
- Best practice to be replicated
- GPs can be engaged to partner in delivery of service

5.3.6.4. **Resources:** Focus will be people but when moving into the engagement and delivery phase marketing spend may be needed, specialist support may also be needed

- People: Project Manager, Project Support Officer, Warm Home Prescription specialists (TBC)
- Money: c. £20,000 for external contractors and marketing activity

5.3.6.5. **Links:**

- Benefit from [action 1.1 A](#) being completed first
- Overlap with [action 1.1 C](#) so some activity could be incorporated
- Strong link with [action 2.2 A](#)

5.3.6.6. **Strategic alignment:**

- Principle 1 Work together: Collaborating fully with local community organisations and helping to ensure equity by supporting those most in need
- Direct beneficiaries: Public health, local authorities, supply chain

- Strength 3: Previous experience establishing pilot projects
- Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes

5.3.7. Action 1.1 E Develop business plan to launch specialist technical support for homeowners

- 5.3.7.1. **Context:** The delivery of retrofits often requires detailed assessments of homes and occupants to determine the right solutions, correct design and checking that works have been done correctly
- 5.3.7.2. **Approach:** Research potential business models and comparative risks, consult with stakeholders on preferred models, develop fully costs business plan and secure funding
- 5.3.7.3. **Assumptions:**
- There is a small but important market for paid-for technical retrofit services to enable development of sustainable market
 - Subsidising retrofit assessments increases engagement and can convert to action
 - Best practice to be replicated
- 5.3.7.4. **Resources:** Initially mainly a research and desk-top exercise but may require consultation with Procurement Officers in relation to securing external service providers
- People: Project Manager, Project Support Officer, Procurement Officers, independent Retrofit Adviser
 - Money: Minimal to develop business plan but would require seed funding (c. £250k +)
- 5.3.7.5. **Links:**
- Service could be added on to general support service output from [action 1.1 A](#)
 - Link with [action 4.1 B](#)
- 5.3.7.6. **Strategic alignment:**
- Principle 4 Realistic and ambitious: When the need has been fully figured out, striving to be entrepreneurial
 - Direct beneficiaries: Homeowners, supply chain
 - Strength 5: High level of home ownership & affluence
 - Strength 6: Similar housing archetypes in specific locations
 - Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes

Goal 1.2: Increase retrofit investment in owner occupied and private landlord housing

5.3.8. **Strategic fit** (across all goal actions):

- Weakness 14: Lack of householder/tenant demand

- Opportunity 5: Local job creation
- Opportunity 10: Mobilise the Repair, Maintenance Industry
- Opportunity 14: Partnering with private investment
- Threat 4: Regulatory and policy delays
- Threat 7: Difficulties in developing the workforce

5.3.9. **Action 1.2 A: Trial bulk-purchasing scheme for retrofit measures to deliver cost savings and quality installations**

5.3.10. **Context:** Cost of retrofit measures acts as a barrier to take up

5.3.10.1. **Approach:** Research potential providers of service and, if available, develop specification and procure delivery partner ensuring evaluation plan put in place.

5.3.10.2. **Assumptions:**

- Bulk-purchasing of low carbon retrofit technology can deliver costs savings to the consumer and still provide high quality customer service and installation
- A pilot could be developed like Solar Together for different retrofit measures (for example for Air Source Heat Pumps)
- There is a market for retrofit measures
- One or more entities will contract with a service provider and invest funding (likely for marketing campaign if like Solar Together model)
- Earlier Solar Together schemes show this type of initiative can deliver benefits

5.3.10.3. **Resources:** Likely to require one or more entities to contract with a service provider and invest in marketing campaign

- People: Project Manager, Procurement Officer, external service provider (TBC)
- Money: c. £50,000 for marketing campaign

5.3.10.4. **Links:**

- May benefit from launching after [action 1.1 A](#) has launched General Support Service
- Link with [action 2.1 A](#) as local SMEs could be supported in securing contract

5.3.10.5. **Strategic alignment:**

- Principle 2 Evidence led: Building on successful past projects to deliver more
- Direct beneficiaries: Homeowners
- Strength 3: Previous experience establishing pilot projects
- Strength 6: Similar housing archetypes in specific locations
- Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes

5.3.11. Action 1.2 B: Support eligible entities without capacity to apply for and deliver government grant schemes (incl. ECO)

- 5.3.11.1. **Context:** Current grant schemes require local authorities ([Warm Homes Local Grant](#), [ECO LA Flex](#)) or social landlords (Warm Homes Social Housing) to secure funding and deliver projects and some do not have the capacity to apply and/or deliver
- 5.3.11.2. **Approach:** Consult with stakeholders to figure out capacity/knowledge gap, develop plan to increase delivery with initial focus on ECO LA Flex as other grant schemes closed for applications, agree plan with stakeholders and implement
- 5.3.11.3. **Assumptions:**
- Majority of retrofit activity will be stimulated by grants or compliance
 - Grant funded measures can deliver good outcomes
 - Some local authorities and social landlords do not have internal capacity or access to match funding to secure and deliver grant schemes
 - Best practice, particularly around e.g. ECO LA Flex, is available for replication
 - E.g. ECO providers looking for properties but struggle to find so need intermediaries
- 5.3.11.4. **Resources:** Coordination, research and planning like to be main tasks and not require external support but may require analysis of housing stock
- People: Project Manager, Project Support Officer
 - Money: c. £20,000 for analysis of housing stock
- 5.3.11.5. **Links:**
- Supported by [action 4.2 A](#)
- 5.3.11.6. **Strategic alignment:**
- Principle 1 Working together: Providing support, sharing best practice, and making best of cost efficiencies through collaboration
 - Direct beneficiaries: Homeowners, local authorities, e.g. ECO providers, supply chain
 - Strength 8: Proven track record of attracting grant funding
 - Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes
 - Opportunity 4: National and local policy alignment
 - Opportunity 12: Group buying
 - Threat 9: Poor public perception and engagement in retrofit
- 5.3.11.7. **Development:**
- Proposed by LARA Project Team at Workshop three
 - Endorsed by stakeholders at Workshop three and classed as Priority action
 - Revised by LARA project team following feedback during Exercise Reviewing goals, actions and Priorities

5.3.12. Action 1.2 C: Introduce Private Landlord register and provide with guidance/ support

- 5.3.12.1. **Context:** Using register communications with private landlords can be improved and therefore their use of support service and grants
- 5.3.12.2. **Approach:** Consult with stakeholders to determine current services, research other models to provide options, consult with stakeholders on options, implement recommendations
- 5.3.12.3. **Assumptions:**
- Private rental properties are a considerable proportion of housing
 - Private rental properties are often most in need of retrofit measures
 - Majority of retrofit activity will be stimulated by grants or compliance
 - Lack of enforcement capacity means opportunities to stimulate action are being missed
 - Likely to be regulations coming in requiring improvement in performance of rental housing
 - Best practice to be replicated
- 5.3.12.4. **Resources:** Research and planning at first but implementation may require addition of activities to existing staff or increase in capacity or use of external contractors to develop online service
- People: Project Manager, Project Support Officer
 - Money: Dependent on preferred option
- 5.3.12.5. **Links:**
- Support element could be delivered through [action 1.1 A](#) so this may need to be completed prior to launch
- 5.3.12.6. **Strategic alignment:**
- Principle 2: By engaging with private landlords, we can best determine needs and appropriate improvement actions to achieve mutual benefits
 - Direct beneficiaries: Private landlords, local authorities, supply chain
 - Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes

5.3.13. Action 1.2 D Develop and implement retrofit measures plan for Building Control including planning policy

- 5.3.13.1. **Context:** Building control are often involved in home improvements, particularly extensions, so could support delivery of retrofit measures either within context of building regulation compliance or signpost to further support
- 5.3.13.2. **Approach:** Consult with building control stakeholders to determine need and potential new services, research any best practice in UK, develop options paper and implement recommendation(s)
- 5.3.13.3. **Assumptions:**
- There is an interaction point with Building Control at which retrofit could be stimulated

- Some retrofit measures can be delivered through ensuring compliance with building regulations – noting that not all retrofit measures come under building control.
 - Building Control may lack up to date knowledge of retrofit design and installation best practice
 - Homeowners carrying out building improvements may be encouraged to carry out retrofit measures when supported
- 5.3.13.4. **Resources:** Research and planning at first but implementation may require additional activities for existing staff or production of guidance
 - People: Project Manager, Project Support Officer
 - Money: Dependent on preferred option and required guidance documentation
- 5.3.13.5. **Links:**
 - May benefit from [action 4.2 A](#) and [action 4.3 A](#) being started or completed first
- 5.3.13.6. **Strategic alignment:**
 - Principle 1 Work Together: Engaging and working collaboratively with a stakeholder that can leverage an important trigger point
 - Direct beneficiaries: Homeowners
 - Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes

Goal 1.3: Increase retrofit investment in social housing

5.3.14. **Strategic fit** (across all goal actions):

- Weakness 14: Lack of public/householder and tenant demand
- Opportunity 5: Local job creation
- Opportunity 10: Mobilise the Repair, Maintenance Industry
- Threat 4: Regulatory and policy delays
- Threat 7: Difficulties in developing the workforce

5.3.15. Action 1.3 A: Provide support for those social landlords without capacity to apply for and deliver grant schemes (incl. ECO)

- 5.3.15.1. **Context:** Current grant schemes require local authorities (Warm Homes Local Grant, ECO LA Flex) or social landlords (Warm Homes Social Housing) to secure funding and deliver projects and some do not have the capacity to apply and/or deliver
- 5.3.15.2. **Approach:** Consult with stakeholders to determine capacity/knowledge gap, develop plan to increase delivery as grant schemes open for applications, agree plan with stakeholders and implement. Ensure awareness of [RISE](#) service and other products already providing this service to these stakeholders. Consider option of low-cost procurement framework such as Watford/Three Rivers to support coordinated approach.

5.3.15.3. **Assumptions:**

- Majority of retrofit activity will be stimulated by grants or compliance
- Grant funded measures can deliver good outcomes
- Some local authorities and social landlords do not have internal capacity or access to match funding to secure and deliver grant schemes
- Best practice is available for replication
- Providers are looking for properties but struggle to find so need intermediaries

5.3.15.4. **Resources:** Coordination, research and planning likely to be main tasks and will not require external support but may require analysis of housing stock

- People: Project Manager, Project Support Officer
- Money: c. £20,000 for analysis of housing stock

5.3.15.5. **Links:**

- Replication of [action 1.2 B](#) but for social landlords

5.3.15.6. **Strategic alignment:**

- Direct beneficiaries: Tenants, social landlords, stock-holding local authorities, ECO providers, supply chain
- Strength 8: Proven track record of attracting grant funding
- Weakness 4: Lack of marketplace for graduates or potential employees for skills programme
- Opportunity 4: National and local policy alignment
- Threat 9: Poor public perception and engagement in retrofit

5.3.16. Action 1.3 B Support social landlords in having up to standard housing stock data

5.3.16.1. **Context:** Effective delivery of retrofit strategies needs to be built on good stock data and benefits grant applications

5.3.16.2. **Approach:** Consult with social landlords to determine current level of data, research standards and best practice, determine gap, develop business case for improving data and secure internal/external funding

5.3.16.3. **Assumptions:**

- Levels of building stock data vary between social landlords
- Best practice and/or standard is available
- Having good stock data provides financial savings for social landlords and therefore a business case for investment can be made

5.3.16.4. **Resources:** Research and planning at first but implementation may require addition of activities to existing staff or external specialist support (software)

- People: Project Manager, Project Support Officer
- Money: Dependent on preferred option

5.3.16.5. **Links:**

- May need completion to enable [action 1.3 A](#) and [action 4.2 A](#) to be effective
- May need [action 1.3 C](#) to be completed in parallel

5.3.16.6. **Strategic alignment:**

- Direct beneficiaries: Tenants, social landlords
- Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes
- Threat 6: Ability to conduct Housing stock analysis

5.3.17. Action 1.3 C Support integration of retrofit into regular asset management by social landlords

5.3.17.1. **Context:** Social landlords continually carry out improvement works, and this provides opportunity to expand into retrofit measures at less of an opportunity cost than when doing separately

5.3.17.2. **Approach:** Consult with social landlords to determine current practices, research best practice, develop business case for additional investment in retrofit over and above 'business as usual' and options paper and consult to determine improvement action

5.3.17.3. **Assumptions:**

- Opportunities to add retrofit measures to general maintenance being missed
- Guidance available on how to integrate retrofit into general maintenance

5.3.17.4. **Resources:** Research and planning at first but implementation may require addition of activities to existing staff or external specialist support (software)

- People: Project Manager, Project Support Officer
- Money: Dependent on preferred option

5.3.17.5. **Links:**

- May need [action 1.3 B](#) to be completed in parallel

5.3.17.6. **Strategic alignment:**

- Direct beneficiaries: Social landlords, tenants, supply chain
- Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes

5.3.18. Action 1.3 D Link up social landlord and private tenure grant schemes to maximise benefit/efficiencies

5.3.18.1. **Context:** Social landlords will be carrying out grant-funded and non-grant funded retrofit works which may be in areas with non-social housing property and therefore economies of scale could be found.

5.3.18.2. **Approach:** Consult with social landlords and local authorities to determine current and planned works, assess to see if opportunities to deliver works in partnership, develop business case and options paper and consult to determine improvement action

5.3.18.3. **Assumptions:**

- Costs can be reduced through pooling works

- Grant schemes available for both social and non-social housing
- Procurement and contractual strategies can be delivered to enable partnership delivery of retrofit measures
- 5.3.18.4. **Resources:** Research and planning at first but implementation may require addition of activities to existing staff or external specialist support (procurement, contracting)
 - People: Project Manager, Project Support Officer
 - Money: Dependent on preferred option
- 5.3.18.5. **Links:**
 - Likely need [action 4.2 A](#), [action 1.2 B](#) and [action 1.3 A](#) to be completed first
- 5.3.18.6. **Strategic alignment:**
 - Direct beneficiaries: Local authorities, social landlords, private landlords, tenants, homeowners
 - Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes

Goal 2.1: Realise local economic benefits

5.3.19. **Strategic fit** (across all goal actions):

- N/A

5.3.20. Action 2.1 A: Develop and deliver Hertfordshire procurement strategy which utilises local supply chain, particularly SMEs

- 5.3.20.1. **Context:** Current procurement policies and processes hinder involvement by local contractors, particularly SMEs and therefore minimise local benefit
- 5.3.20.2. **Approach:** Create procurement working group with representation from local authorities and social landlords to review processes/policies, develop potential intervention(s) (e.g. standard tender template, reduced data entry requirements for contractors), consult on interventions and agree improvement plan.
- 5.3.20.3. **Assumptions:**
 - There are significant barriers to smaller (Tier 2 and 3) installers in procurement, which limits the growth of the sector)
 - Local benefit can be provided and comply with regulations
 - Local suppliers can deliver greater socioeconomic value
 - Public procurement regulations allow for emphasis on local suppliers
 - SMEs report a perception of complexity and technicality in public procurement which hinders their involvement
- 5.3.20.4. **Resources:** Likely to require specialist procurement input and potentially legal advice and may well need IT support to develop online systems
 - People: Project Manager, Procurement Officer(s)
 - Money: £20,000 - £30,000 for legal support, £20,000 for web support/data entry

5.3.20.5. **Links:**

- Pre-cursor to [action 2.2 B](#)
- [action 1.2 A](#) may benefit from action 2.1 A being completed first

5.3.20.6. **Strategic alignment:**

- Direct beneficiaries: Supply chain (local)
- Strength 3: Previous experience establishing pilot projects
- Weakness 7: Procurement reticence
- Opportunity 5: Local job creation
- Opportunity 6: Leverage co-benefits through aligned procurement

Goal 2.2: Realise health and wellbeing benefits

5.3.21. **Strategic fit** (across all goal actions):

- N/A

5.3.22. Action 2.2 A Coordinate with Public Health, Social Care and Integrated Care System's (ICS') to strengthen the enabling environment for retrofit and create a shared language, work and understanding of it

5.3.22.1. **Context:** Retrofit can deliver public health benefits but there is a lack of understanding, capacity and process to enable this to happen

5.3.22.2. **Approach:** Develop Retrofit and Health working group with representation from public health, social care and ICS', review existing policy framework and determine improvement actions

5.3.22.3. **Assumptions:**

- Some public health grant schemes can benefit from retrofit
- Retrofit can deliver public health and social benefits

5.3.22.4. **Resources:** Likely to require stakeholder time for meetings and officer time to develop material for working groups, research aspects of the work

- People: Project Manager, public health/social care officers
- Money: Dependent on need for additional research

5.3.22.5. **Links:**

- Links with [action 4.3 A](#)
- Likely a pre-cursor to [action 1.1 D](#)

5.3.22.6. **Strategic alignment:**

- Direct beneficiaries: Public health, local authorities
- Opportunity 11: Engage health professionals and align to health and social care objectives
- Opportunity 13: Retrofit as a springboard to encourage behaviour change

5.3.23. Action 2.2 B: Develop and deliver SME-friendly social impact standard to be used by all relevant retrofit projects/procurements

- 5.3.23.1. **Context:** Social value is a defined term and part of public procurements which enables contractors to invest in specific activities that deliver social good
- 5.3.23.2. **Approach:** Determine best practice in social value standards, review with stakeholders (including SMEs), secure stakeholder approval and then implement standard in public sector procurements
- 5.3.23.3. **Assumptions:**
- Levels of social value from projects could be improved
 - Best practice available for replication
 - Maximising social value may increase take up of retrofit measures
- 5.3.23.4. **Resources:** Researcher needed to review existing standards, working group of procurement officer to create draft then stakeholder group to consult with
- People: Project Manager, procurement officers
 - Money: Dependent on need for additional research and legal advice
- 5.3.23.5. **Links:**
- Will likely need [action 2.1 A](#) completed first or in parallel
- 5.3.23.6. **Strategic alignment:**
- Direct beneficiaries: Supply chain, local authorities, social landlords
 - Opportunity 13: Retrofit as a springboard to encourage behaviour change

5.3.24. Action 2.2 C: Determine socio-economic KPIs of the Strategy and report on performance

- 5.3.24.1. **Context:** Socio-economic benefits of retrofit is important to stakeholders and therefore performance needs to be evaluated to figure out progress towards outcomes.
- 5.3.24.2. **Approach:** Research socio-economic KPIs and data sources as well as data gathering processes, map against outcomes, consult with stakeholders on findings, develop improvement action proposal with budget requirements, consult with stakeholders and implement
- 5.3.24.3. **Assumptions:**
- Reporting on impact important to keep stakeholders engaged and secure external funding
 - KPIs can be found to measure direct/in-direct impact
- 5.3.24.4. **Resources:** Research and planning at first but implementation may require addition of activities to existing staff or external specialist support (data gathering)
- People: Project Manager, Project Support Officer
 - Money: Dependent on final process
- 5.3.24.5. **Links:**
- May receive help from integration into [action 2.3 A](#).
- 5.3.24.6. **Strategic alignment:**

- Direct beneficiaries: System-wide
- Strength 9: Recognition of the climate emergency and political will
- Weakness 6: Limited stakeholder engagement and lack of public understanding
- Threat 5: Urgency of Climate Impact Response

5.3.25. Action 2.2 D: Promote ventilation/moisture strategies through support services and grant schemes

- 5.3.25.1. **Context:** Some houses suffer from poor ventilation and damp and making buildings more air-tight or installing insulation can cause other problems
- 5.3.25.2. **Approach:** Research best-practice strategies, consult with stakeholders on findings, develop improvement actions for use by support services and grant scheme designers
- 5.3.25.3. **Assumptions:**
- Retrofit can deliver improved ventilation
 - Benefits of good ventilation strategies not well known
 - Improved ventilation can deliver health benefits
 - Best practice strategies can be found
- 5.3.25.4. **Resources:** Research and planning at first but implementation may require addition of activities to existing staff or external specialist support (technical guidance)
- People: Project Manager, Project Support Officer
 - Money: Dependent on final process
- 5.3.25.5. **Links:**
- Will require [action 1.1 A](#) to be completed to enable provision of support to population
- 5.3.25.6. **Strategic alignment:**
- Direct beneficiaries: Homeowners, tenants, health services
 - Weakness 9: Higher than national average listed and conservation (heritage) properties

Goal 2.3: Realise environmental benefits

5.3.26. **Strategic fit** (across all goal actions):

- N/A

5.3.27. Action 2.3 A: Assess and report on embodied and operational carbon emissions from grant schemes

- 5.3.27.1. **Context:** Delivering retrofit measures requires materials and these will come with their own carbon footprints which negatively impact on the carbon-savings the measures are delivering

- 5.3.27.2. **Approach:** Research embodied carbon of retrofit measures to decide if process possible (e.g. database available), develop reporting process, consult with stakeholders, implement improvement action
- 5.3.27.3. **Assumptions:**
- Awareness of carbon impact from measures can deliver change in behaviours
 - Embodied carbon tool available
- 5.3.27.4. **Resources:** Mainly research activity at first then consultation but may require technical support to develop reporting tool
- People: Project Manager, Project Support Officer
 - Money: Dependent on final improvement action
- 5.3.27.5. **Links:**
- May benefit from focus on [action 2.2 C](#) prior to completion or integration of actions.
- 5.3.27.6. **Strategic alignment:**
- Direct beneficiaries: System-wide
 - Strength 9: Recognition of the climate emergency and political will
 - Weakness 6: Limited stakeholder engagement and lack of public understanding
 - Threat 5: Urgency of Climate Impact Response
- 5.3.28. Action 2.3 B: Promote use of low carbon, sustainable materials via support services and building control
- 5.3.28.1. **Context:** Delivering retrofit measures requires materials and these will come with their own ecological footprints which negatively impact on the sustainability benefits the measures are delivering
- 5.3.28.2. **Approach:** Research databases of low carbon, sustainable materials, develop information sharing process, consult with stakeholders, implement improvement action. Consider use of Energy Technology List and other independent sources of best practice data.
- 5.3.28.3. **Assumptions:**
- Retrofit works offers opportunity to carry out improvement measures
 - Low carbon materials available
- 5.3.28.4. **Resources:** Mainly research activity at first then consultation but may require technical support to develop reporting tool
- People: Project Manager, Project Support Officer
 - Money: Dependent on final improvement action
- 5.3.28.5. **Links:**
- Implementation will be dependent on completion of [action 1.1 A](#) and would be supported by [action 1.1 E](#)
- 5.3.28.6. **Strategic alignment:**

- Direct beneficiaries: Supply chain
- Threat 5: Urgency of Climate Impact Response

5.3.29. Action 2.3 C: Promote biodiversity measures through support services

- 5.3.29.1. **Context:** Biodiversity in the UK is declining, with many species threatened with extinction and the UK is one of the most nature-depleted countries in the world. Resources and expertise exist and potentially interconnect with HNRS, Local Authority Biodiversity Duty and other regulatory expectations, that can be amplified through partnership working.
- 5.3.29.2. **Approach:** Consult with HNRS to highlight biodiversity measures that could be included in a retrofit, develop information sharing process, consult with stakeholders on ability to implement measures, implement improvement action
- 5.3.29.3. **Assumptions:**
 - Measures possible that can have positive nature impacts
 - Best practice available for replication
- 5.3.29.4. **Resources:** Mainly research activity at first then consultation but may require technical support to develop reporting tool
 - People: Project Manager, Project Support Officer
 - Money: Dependent on final improvement action
- 5.3.29.5. **Links:**
 - Implementation will be dependent on completion of [action 1.1 A](#) and would be supported by [action 1.1 E](#)
 - Link with [action 2.3 D](#)
- 5.3.29.6. **Strategic alignment:**
 - Direct beneficiaries: System-wide
 - Threat 12: Politicisation of climate change conversation

5.3.30. Action 2.3 D: Utilise place-based pilot to deliver natural capital improvements

- 5.3.30.1. **Context:** Natural capital in urban areas is decreasing due to the expansion of built-up areas, leading to the loss of green spaces, destruction of natural habitats, and reduced biodiversity, ultimately impacting ecosystem services like air purification, water filtration, and climate regulation as cities grow and develop
- 5.3.30.2. **Approach:** Research natural capital improvement measures/schemes, develop information sharing process, consult with stakeholders on ability to implement measures, implement improvement action
- 5.3.30.3. **Assumptions:**
 - Delivering nature improvements can build trust and therefore aid place-based initiatives
 - Communities engage with natural improvements more than retrofit
- 5.3.30.4. **Resources:** Mainly research activity at first then consultation but may require technical support to develop reporting tool
 - People: Project Manager, Project Support Officer

- Money: Dependent on final improvement action
- 5.3.30.5. **Links:**
 - Implementation will be dependent on [action 1.1 B](#) and may be considered a pre-cursor
 - Link with [action 2.3 C](#)
- 5.3.30.6. **Strategic alignment:**
 - Direct beneficiaries: Homeowners, tenants
 - Threat 12: Politicisation of climate change conversation

Goal 3.1: Increase local supply chain capacity and quality through improved retrofit standards and demand. Strategic fit (across all goal actions):

- Weakness 12: Policy environment and communication from government
- Weakness 13: Lack of confidence in technology, installation quality and trusted and knowledgeable local intermediaries
- Opportunity 7: Skills training and career development for young people
- Threat 4: Regulatory and policy delays
- Threat 13: Poor quality work undermines trust and confidence

5.3.31. Action 3.1 A: Develop and manage lists of good and trusted suppliers

- 5.3.31.1. **Context:** Quality within the supply chain is an issue and holds back take up of measures through a lack of consumer confidence
- 5.3.31.2. **Approach:** Research best practice within UK, create procurement working group with representation from local authorities and social landlords to review findings and develop proposals, consult with supply chain and develop business plan. Consider incentives for suppliers to be on list to ensure integrity and variety.
- 5.3.31.3. **Assumptions:**
 - Holder of list can manage risk of 'recommendation'
 - Definition of 'good' is possible and can be assessed against
 - Intervention can help to match supply and demand and to increase commissioner/consumer trust
- 5.3.31.4. **Resources:** Likely to require research time and legal advice to decide how to manage risk
 - People: Project Manager, Procurement Officer(s)
- 5.3.31.5. **Money:** £20,000 - £30,000 for legal support
- 5.3.31.6. **Links:**
 - If to be used by public sector organisations may benefit from completion of [action 2.1 A](#) beforehand
- 5.3.31.7. **Strategic alignment:**
 - Direct beneficiaries: Homeowners, social landlords

- Weakness 8: Skills shortage and limited installation capacity
- Opportunity 10: Mobilise the Repair, Maintenance Industry
- Threat 7: Difficulties in developing the workforce

5.3.32. Action 3.1 B: Develop and deliver support network for local installers with training including Continuing Professional Development sessions

- 5.3.32.1. **Context:** Retrofit knowledge within the supply chain is low but there is likely to be a number of installers who could be engaged with and a network grown
- 5.3.32.2. **Approach:** Research best practice within UK, produce options paper, consult with stakeholders, revise and develop business plan and secure funding
- 5.3.32.3. **Assumptions:**
- Appropriate qualified and non-qualified courses are available
 - Best practice available to be replicated
 - Demand from installers
- 5.3.32.4. **Resources:** Likely to require research time and then project management to develop options paper and secure funding, possible external contractor support
- People: Project Manager, Project Support Officer
- 5.3.32.5. **Money:** £20,000 - £30,000 for external support and run engagement activities
- 5.3.32.6. **Links:**
- May benefit from completion of [action 2.1 A](#) beforehand so supply chain can see demand generation activity happening and therefore encourage engagement
 - Would tie in with launch of specialist support service under [action 1.1 E](#)
 - Could support [action 3.1 A](#)
- 5.3.32.7. **Strategic alignment:**
- Direct beneficiaries: Supply chain
 - Weakness 8: Skills shortage and limited installation capacity
 - Opportunity 10: Mobilise the Repair, Maintenance Industry
 - Threat 7: Difficulties in developing the workforce

5.3.33. Action 3.1 C: Develop and deliver apprenticeship support service for stakeholders (particularly businesses)

- 5.3.33.1. **Context:** Supply chain often finds it difficult to take on apprentices, but capacity is falling and therefore we need to engage new entrants
- 5.3.33.2. **Approach:** Research best practice within UK, produce options paper, consult with stakeholders, revise and develop business plan and secure funding
- 5.3.33.3. **Assumptions:**
- Full cost of apprenticeships to employers is hindering their use
 - Apprentice completion rates are an issue
 - Funding can come from apprenticeship levy transfer schemes

- Successful support models to be replicated, such as flexi-apprenticeship model
- Current apprenticeship offers not increasing numbers of entrants of diversification
- Apprenticeships can encourage people into supply chain
- 5.3.33.4. **Resources:** Likely to require research time and then project management to develop options paper and secure funding, possible external contractor support
 - People: Project Manager, Project Support Officer
- 5.3.33.5. **Money:** Dependent on chosen option(s)
- 5.3.33.6. **Links:**
 - May benefit from completion of [action 3.2 A](#) and [action 3.2 B](#) first
- 5.3.33.7. **Strategic alignment:**
 - Direct beneficiaries: New entrants, supply chain
 - Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes
 - Weakness 8: Skills shortage and limited installation capacity
 - Weakness 11: Colleges ready but not getting students

Goal 3.2: Increase demand for training and ensure adequate capacity/quality

5.3.34. Strategic fit (across all goal actions):

- Weakness 12: Policy environment and communication from government
- Weakness 13: Lack of confidence in technology, installation quality and trusted and knowledgeable local intermediaries
- Opportunity 7: Skills training and career development for young people
- Threat 4: Regulatory and policy delays
- Threat 13: Poor quality work undermines trust and confidence

5.3.35. Action 3.2 A: Develop process between supply chain, commissioners, and training providers to ensure training provision meets needs

- 5.3.35.1. **Context:** There are interconnections between the supply chain, contract commissioners (e.g. local authorities, social landlords) and training providers which would benefit from support and coordination
- 5.3.35.2. **Approach:** Research current informal/formal relationships between stakeholders, research any best practice nationally, figure out gap, develop options paper, consult with stakeholders, develop business plan and secure funding to implement
- 5.3.35.3. **Assumptions:**
 - Better coordination can deliver benefits to stakeholders
 - Best practice available that can be replicated
 - Mismatch is holding back delivery of retrofit measures

- 5.3.35.4. **Resources:** Likely to require research time and project management with further activity dependent on chosen improvement actions
 - People: Project Manager, Procurement Officer(s)
- 5.3.35.5. Money: TBC when improvement actions determined
- 5.3.35.6. **Links:**
 - Could support effective delivery of [action 3.1 C](#) and [action 3.2 B](#)
- 5.3.35.7. **Strategic alignment:**
 - Direct beneficiaries: Supply chain, local authorities, social landlords, training providers
 - Strength 2: Established green skills programmes
 - Weakness 8: Skills shortage and limited installation capacity
- 5.3.36. Action 3.2 B: Develop installer and training-provider collaboration (e.g. trainer mentoring, on-site training)
 - 5.3.36.1. **Context:** Training providers may find it difficult to keep up with development and best practice within the supply chain
 - 5.3.36.2. **Approach:** Research any current links between local training providers and the supply chain, research best practice, develop options paper, consult with stakeholders, develop business plan and secure funding to implement
 - 5.3.36.3. **Assumptions:**
 - Valuable knowledge can be transferred from supply chain to training providers and back again
 - Learning opportunities at live retrofit sites
 - 5.3.36.4. **Resources:** Likely to require research time and project management with further activity dependent on chosen model
 - People: Project Manager, Procurement Officer(s)
 - 5.3.36.5. Money: c. £50,000 per year for delivered service
 - 5.3.36.6. **Links:**
 - May benefit from completion of [action 3.2 A](#) first
 - May well benefit from [action 3.1 A](#) and [action 3.1 B](#)
 - 5.3.36.7. **Strategic alignment:**
 - Direct beneficiaries: Supply chain, training providers
 - Strength 2: Established green skills programmes
 - Weakness 8: Skills shortage and limited installation capacity
- 5.3.37. Action 3.2 C: Secure funding to deliver training provision improvements
 - 5.3.37.1. **Context:** Training providers require improvement in training facilities to meet demand for retrofit training and to meet demand for increased levels of trainee knowledge

- 5.3.37.2. **Approach:** Review and update current training provision and any national best practice/ standards, figure out gap, develop options paper, consult with stakeholders, develop business plan and secure funding to implement
- 5.3.37.3. **Assumptions:**
- Funding can be secured to deliver improvements
 - Training centres may not have adequate facilities to teach all retrofit measures
- 5.3.37.4. **Resources:** Likely to require research time and project management with further activity dependent on chosen improvement actions
- People: Project Manager, Procurement Officer(s)
 - Money: TBC when improvement actions determined
- 5.3.37.5. **Links:**
- Benefit from completion of [action 3.2 A](#) first
- 5.3.37.6. **Strategic alignment:**
- Direct beneficiaries: Training providers
 - Strength 2: Established green skills programme
 - Weakness 8: Skills shortage and limited installation capacity
- 5.3.38. Action 3.2 D: Engage with careers services and coordinate retrofit careers promotional activity, with a focus on diversifying the workforce
- 5.3.38.1. **Context:** A career in the construction sector is often not seen as a good career path and particularly for women, minorities and disadvantaged groups
- 5.3.38.2. **Approach:** Research careers advice system in locality and current provision, research any national best practices, figure out gap, develop options paper, consult with stakeholders, develop business plan and secure funding to implement
- 5.3.38.3. **Assumptions:**
- Current supply chain capacity will not meet demand in 3-yrs
 - Greater levels of diversification in the supply chain would have positive impact
 - Lack of retrofit career knowledge is hindering promotion by advisors
- 5.3.38.4. **Resources:** Likely to require research time and project management with further activity dependent on chosen improvement actions
- People: Project Manager, Procurement Officer(s)
 - Money: TBC when improvement actions determined
- 5.3.38.5. **Links:**
- Would benefit from completion of [action 3.2 A](#) first
- 5.3.38.6. **Strategic alignment:**
- Direct beneficiaries: Careers services, supply chain, training providers
 - Weakness 4: Lack of marketplace for graduates or potential employees for skills programmes

- Weakness 8: Skills shortage and limited installation capacity
- Weakness 11: Colleges ready but not getting students

Goal 4.1: Develop suitable retrofit strategy, governance and delivery arrangements

5.3.39. **Strategic fit** (across all goal actions):

- Opportunity 2: Funding availability

5.3.40. **Action 4.1 A:** Create delivery vehicle, governance and reporting structure to ensure delivery of retrofit strategy involving all relevant stakeholders

- 5.3.40.1. **Context:** The Local Retrofit Strategy will require a centralised or decentralised team to deliver, and processes put in place to ensure decisions are effectively taken on behalf of stakeholders
- 5.3.40.2. **Approach:** Put in place LRS project delivery team and board to develop and deliver actions either directly or via stakeholder/third-party
- 5.3.40.3. **Assumptions:**
- Needs to be a central point bringing together and transferring knowledge
 - LRS will require ongoing support to ensure delivery of outcomes
 - Critical to success is ownership of strategic goals
 - Lack of capacity is holding back interventions to increase retrofit
- 5.3.40.4. **Resources:** Likely to require Project Manager and Project Officer(s) and then board representatives from stakeholders
- People: Project Manager, Project officer(s)
 - Money: c. £100,000 per year to run project delivery team
- 5.3.40.5. **Links:**
- Recommend as pre-cursor to all other actions
- 5.3.40.6. **Strategic alignment:**
- Direct beneficiaries: Local authorities, social landlords, training providers, community energy organisations, supply chain
 - Strength 10: Established industry leaders e.g. GSK
 - Weakness 1: Lack of objective priorities
 - Weakness 2: Lack of retrofit strategy
 - Weakness 3: Limited resources and capacity
 - Weakness 5: Collaboration between all stakeholders could complicate project oversight if governance, roles, and responsibilities aren't clearly defined, especially in the absence of a guiding strategy
 - Opportunity 1: Strategy development
 - Opportunity 2: Funding availability
 - Opportunity 3: Innovation and knowledge sharing

- Opportunity 4: National and local policy alignment
- Opportunity 15: Devolution
- Threat 1: Funding gaps or uncertainty
- Threat 5: Urgency of Climate Impact Response
- Threat 10: Liabilities from consortia and risk averse councils
- Threat 14: Devolution process derails agendas

5.3.41. **Action 4.1 B: Develop delivery vehicle owned by stakeholders to deliver retrofit measures to share risk and increase benefit.**

- 5.3.41.1. **Context:** Retrofit is an emerging market with limited capacity in the supply chain and high costs therefore ways to maximise capacity, minimise costs and maximise benefits can support development of a wider supply chain
- 5.3.41.2. **Approach:** Research existing examples of best practice, form working group to review, develop proposals for consultation and then develop business plan.
- 5.3.41.3. **Assumptions:**
- Risks can be reduced through becoming managing agent
 - Potential for SPV to deliver greater benefits to stakeholders
 - Emerging models to be replicated
- 5.3.41.4. **Resources:** Project Manager and Project Officer(s) to carry out research and develop business plan
- People: Project Manager, Project officer(s)
 - Money: TBC
- 5.3.41.5. **Links:**
- Require [action 4.1 A](#) to be completed first
 - May benefit from following [action 1.1 A](#)
 - Could be used to deliver measures as part of [action 1.1 B](#)
 - May be incorporated with [action 1.1 E](#)
- 5.3.41.6. **Strategic alignment:**
- Direct beneficiaries: Local authorities, social landlords
 - Strength 1: Collaborative networks and established governance
 - Weakness 10: Limited numbers of community energy groups and not seen as a partner

5.3.42. **Action 4.1 C: Develop working group to engage and encourage non-Tier 1 Herts businesses to secure contracts**

- 5.3.42.1. **Context:** Achieving the strategic vision will require an increase in supply chain capacity and SMEs can find it difficult to win contracts and therefore will not be stimulated to invest
- 5.3.42.2. **Approach:** Define draft terms of reference for Working Group, invite stakeholders to take part, review and agree terms of reference, find chair and arrange meetings

5.3.42.3. **Assumptions:**

- Recognises the need for distinct support for non-Tier 1 contractors, either directly or through existing frameworks and contracts with Tier 1 contractors
- Already has momentum and commitment through LARA
- Non-tier 1 contractors struggling to win local retrofit contracts even though they can deliver specification

5.3.42.4. **Resources:** Project Manager and Project Officer(s) to carry out development and then facilitate meetings

- People: Project Manager, Project officer(s)
- Money: Minimal

5.3.42.5. **Links:**

- Require [action 4.1 A](#) to be completed first
- Probable pre-cursor to [action 2.1 A](#)
- Provide feedback for options coming from [action 2.2 B](#)

5.3.42.6. **Strategic alignment:**

- Direct beneficiaries: Supply chain (local)
- Strength 1: Collaborative networks and established governance
- Strength 3: Previous experience establishing pilot projects
- Opportunity 6: Leverage co-benefits through aligned procurement

5.3.43. Action 4.1 D: Agree priority demographics and building archetypes and gather data on locations

5.3.43.1. **Context:** With limited resources the use of prioritisation could enable more efficient delivery of vision

5.3.43.2. **Approach:** Use Locality Assessment and Herts Insight to develop potential prioritisation models, consult with stakeholders, develop final plan and implement

5.3.43.3. **Assumptions:**

- Some demographics may be considered to have greater need than others and/or resonate with vision more, or groups in greater need may already have been extensively targeted through grant funding.
- Metrics available to decide demographics and/or archetypes
- Data can be found to decide locations of prioritised demographics/archetypes

5.3.43.4. **Resources:** Project Manager and Project Officer(s) to carry out development and then support, directly and indirectly through stakeholders, the evidenced prioritised demographics/archetypes

- People: Project Manager, Project officer(s)
- Money: TBC when approach is determined

5.3.43.5. **Links:**

- To be completed prior to [action 1.1 B](#)
- Likely need to be completed prior to [action 1.2 B](#) and [action 1.3 A](#)

5.3.43.6. **Strategic alignment:**

- Direct beneficiaries: TBC
- Weakness 9: Higher than national average listed and conservation (heritage) properties

5.3.43.7. **Development:**

- Developed by Procurement Working Group
- LARA Project Team revised and proposed action at Workshop three
- Endorsed by stakeholders at Workshop three

Goal 4.2: Increase collaboration, data-sharing and learning

5.3.44. **Strategic fit** (across all goal actions):

- Opportunity 2: Funding availability
- Opportunity 3: Innovation and knowledge sharing

5.3.45. Action 4.2 A: Create stakeholder-specific forums to coordinate activity within stakeholder group (with representation from central team)

5.3.45.1. **Context:** Critical to success is continued collaboration within stakeholder groups

5.3.45.2. **Approach:** Define draft terms of reference for Stakeholder Groups and appropriate stakeholder types, invite stakeholders to take part, review and agree terms of reference, find chair and arrange meetings

5.3.45.3. **Assumptions:**

- Stakeholders will see value in continuing to collaborate
- Sharing of knowledge will improve benefits and ability to achieve vision

5.3.45.4. **Resources:** Project Manager and Project Officer(s) to carry out development and then facilitate meetings

- People: Project Manager, Project officer(s)
- Money: Minimal

5.3.45.5. **Links:**

- Require [action 4.1 A](#) to be completed first and then likely pre-cursor to all further actions

5.3.45.6. **Strategic alignment:**

- Direct beneficiaries: System-wide
- Weakness 1: Lack of objective priorities

- Weakness 5: Collaboration between all stakeholders could complicate project oversight if governance, roles, and responsibilities aren't clearly defined, especially in the absence of a guiding strategy
- Weakness 6: Limited stakeholder engagement and lack of public understanding
- Weakness 10: Limited numbers of community energy groups and not seen as a partner
- Threat 1: Funding gaps or uncertainty
- Threat 14: Devolution process derails agendas

5.3.46. Action 4.2 B: Develop and implement process to assess and manage retrofit demand to supply balance

- 5.3.46.1. **Context:** If demand outstrip supply consumers may lose interest and prices increase and if supply outstrips demand suppliers may lose interest and disinvest, with both scenarios creating a lag on rectification
- 5.3.46.2. **Approach:** Decide process to ascertain supply and demand, consult with stakeholders, revise and implement plan
- 5.3.46.3. **Assumptions:**
- Demand and supply can be figured out through consultation with supply chain and commissioners of services (e.g. local authorities, social landlords)
 - Demand and supply can be determined to a level that enables corrective/improvement actions
 - actions can be put in place to alter levels of demand or supply
 - actions can be put in place to ensure demand and supply balance in the future
- 5.3.46.4. **Resources:** Project Manager and Project Officer(s) to carry out development and then deliver process
- People: Project Manager, Project officer(s)
 - Money: TBC
- 5.3.46.5. **Links:**
- Require [action 4.1 A](#) and [action 4.2 A](#) to be completed first
- 5.3.46.6. **Strategic alignment:**
- Direct beneficiaries: Training providers, supply chain, local authorities, social landlords
 - Opportunity 5: Local job creation
 - Threat 8: Supply chain constraints
- 5.3.47. Action 4.2 C: Develop and deliver process to continue development of Shared Understanding and monitor and evaluate learning from actions
- 5.3.47.1. **Context:** In a complex system we can't be sure what will work, so we need to continually learn, adapt and improve

- 5.3.47.2. **Approach:** Develop evaluation framework based on Shared Understanding process, consult with stakeholders, develop final plan and implement
- 5.3.47.3. **Assumptions:**
- Indicators can be found to figure out progress
 - Learnings from actions can lead to improvements
- 5.3.47.4. **Resources:** Project Manager and Project Officer(s) to carry out development and then facilitate learning process
- People: Project Manager, Project officer(s)
 - Money: TBC when process determined
- 5.3.47.5. **Links:**
- Likely to need [action 4.1 A](#) and [action 4.2 A](#) completed first
 - Could be incorporated with [action 2.2 C](#)
- 5.3.47.6. **Strategic alignment:**
- Direct beneficiaries: Local authorities, social landlords, training providers, community energy organisations, supply chain

Goal 4.3: Ensure local policies are supportive

5.3.48. **Strategic fit** (across all goal actions):

- Opportunity 3: Innovation and knowledge sharing

5.3.49. Action 4.3 A: Coordinate policy implementation and development

- 5.3.49.1. **Context:** Retrofit offers a wide range of benefits and therefore touches on several policy areas
- 5.3.49.2. **Approach:** Map stakeholder policies relating to retrofit benefits, review areas to see how or if retrofit incorporated, consult with relevant stakeholders and determine improvement actions, implement actions.
- 5.3.49.3. **Assumptions:**
- Critical to success is to continue co-development of actions and policy across system
 - Greater alignment can improve outcomes and unlock resources
 - Benefits of retrofit known
- 5.3.49.4. **Resources:** Project Manager and Project Officer(s) to carry out development and then facilitate delivery of improvement action but will require input from public sector policy officers
- People: Project Manager, Project officer(s)
 - Money: TBC
- 5.3.49.5. **Links:**
- May benefit from [action 4.2 A](#) being completed first as a policy group could be set up

- Likely links with [action 2.2 A](#)
- Potential pre-cursor to [action 1.2 D](#) to give rationale/ support for improvement actions

5.3.49.6. **Strategic alignment:**

- Direct beneficiaries: Local authorities, public health
- Weakness 5: Collaboration between all stakeholders could complicate project oversight if governance, roles, and responsibilities aren't clearly defined, especially in the absence of a guiding strategy
- Weakness 12: Policy environment and communication from government
- Opportunity 9: Decentralise electricity grid and develop renewable heat networks
- Opportunity 11: Engage health professionals and align to health and social care objectives

5.3.50. Action 4.3 B: Consider integrating retrofit targets into Local Plans (aligning with 2050 sustainability goals)

5.3.50.1. **Context:** A local plan outlines how an area will develop in the future and created by a local planning authority following consultation

5.3.50.2. **Approach:** Review existing Local Plans for retrofit inclusion, find best practice nationally, determine potential improvements, consult with relevant stakeholders, implement improvement actions, considering relevant policy changes from central government and any upcoming local government reorganisation and its implications to align policies and plans with aligned retrofit targets.

5.3.50.3. **Assumptions:**

- Local Plans are a statutory instrument and so can put weight behind retrofit ambitions and influence building control

5.3.50.4. **Resources:** Project Manager and Project Officer(s) to carry out development and then facilitate delivery of improvement action but will require input and on-going support from planning officers

- People: Project Manager, Project officer(s)
- Money: TBC

5.3.50.5. **Links:**

- May benefit from [action 4.2 A](#) being completed first as a Planning group could be set up
- Links with [action 4.3 A](#)

5.3.50.6. **Strategic alignment:**

- Direct beneficiaries: Local authorities
- Opportunity 9: Decentralise electricity grid and develop renewable heat network