Surrey Retrofit Strategic Action Plan - The Appendix

To ensure a clear and focused Surrey Retrofit Strategic Action Plan (the "Plan") document, detailed information and background to do with the Plan's development is housed instead in this Appendix. While some elements of the Plan co-developed during the Local Area Retrofit Accelerator (LARA) stakeholder workshops have been summarised in the main document, they are included in full in this Appendix for transparency, including methodology, decision-making processes and rationale. This may be of use to aid development of more detailed action plans and planning for allocation of resources and next steps.

Contents

1. Background
2. Vision and Mission
3. Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis detail
4. Shared Principles
5. Outcomes
6. Goals and Actions: Detail and rationale

1. Background

1.1. The Surrey Retrofit Strategic Action Plan (the “Plan”) sets out a systems-led, place-based roadmap to accelerate home retrofit and decarbonisation across Surrey. Developed through the Local Area Retrofit Accelerator (LARA) Pilot, this Plan unites a range of local stakeholders around a shared belief in cutting carbon emissions from heating and cooling homes, reducing fuel poverty, and delivering wider local economic and social benefits. Surrey is one of four 'localities' participating in the LARA Pilot, convened by the MCS Foundation. The other localities were Hertfordshire, The East Midlands Combined Counties, and the Liverpool City Region. While each locality benefited from shared learning and process developments through the pilot, the resulting Local Retrofit Strategies are entirely independent from each other.

1.2. Why a system, place-based approach? Tackling home retrofit at scale demands more than isolated projects, it requires systemic change. The approach takes a whole-system view across six pillars: community, skills and training, homes, low carbon technology, financial resourcing and governance. It recognises that stakeholders need to collaborate and coordinate to create lasting, scalable impact. It is grounded in the unique characteristics and challenges of Surrey as a region, leveraging the expertise and energy of local partners while aligning with national net zero ambitions.

1.3. Between January and July 2025, over 40 organisations collaborated through a structured co-design process involving workshops, working groups, and stakeholder interviews. This included representation from local authorities, community groups, supply chain, social landlords, training providers, financial sector, and national partners. Together, they developed a shared vision and mission, agreed principles, determined strengths, weaknesses, opportunities and threats to accelerating retrofit in the region and developed a suite of coordinated goals and actions.

1.4. The collective vision is “To create a new normal where everyone in Surrey has a comfortable, healthy, affordable-to-run and sustainable home.”

1.5. The mission is “We will work together to deliver our vision, supported by flexible, accessible funding and finance, and delivered by a local skilled, trusted and stable sector.”

1.6. The approach is underpinned by five shared principles:

- Collaborative
- Inclusive
- People-centred
- Ambitious and pragmatic
- Trustworthy, reliable and we act with integrity

1.7. Early delivery of priority actions will be an important first step to kick start the delivery of the Plan including improving public advice services, workforce development, and coordinated use of existing funding streams (e.g., the government’s Warm Homes scheme).

1.8. The Plan is a theory of change. In other words, a framework outlining how and why a specific intervention, programme, or policy is expected to lead to desired changes or outcomes. The Plan details a range of interventions and actions that need to be carried out to achieve goals and associated outcomes. For each action and goal, the why is set out in the rationale and assumptions. Then the Monitoring, Evaluation, Accountability and Learning (MEAL) section details how you can determine whether the theory is working or not.

1.9. The LARA Pilot is being delivered by the MCS Foundation in partnership with the National Retrofit Hub and the UK Green Building Council. The pilot is funded by the MCS Foundation, Greater South East Net Zero Hub and the Aurora Foundation. The MCS Foundation is a charity working to decarbonise homes, heat, and energy in the UK.

1.10. The 'House Plan' (Figure 1 in the main document) visually captures the core outputs of the LARA Pilot co-design process in a familiar and relevant structure. It also reflects the systems approach needed to accelerate retrofit, that the house is only as strong as the sum of its parts. The foundations, our mission and principles provide stability and direction, anchoring and guiding our collective action. The pillars represent the goals and sub-goals, holding the structure upright. The vision and outcomes form the roof, which protects and provides a clear sense of purpose, uniting and covering all our efforts beneath it.

1.11. The Plan was developed as part of the Local Area Retrofit Accelerator pilot (the "Pilot"). This initiative aimed to take a systems approach to tackling retrofit. 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 emphasizes how different elements interact. The Pilot also aimed to take a place-based approach. This 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 Surrey and stakeholders from across the retrofit system in Surrey were invited to co-develop the Plan.

1.12. The Plan came from a series of workshops and working groups attended by actors involved in retrofit within Surrey between January and July 2025. The Pilot team carried out research to help inform decisions and facilitated conversations enabling the Plan to emerge. Surrey County Council were the lead organisation for the process. The Pilot team worked closely with Surrey County Council from the start. Working with Surrey County Council, an extensive list of stakeholders was developed.

1.13. 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 the local retrofit system is working currently. From this, the attendees started to develop themes for a vision. This was then honed by one of the working groups (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.

1.14. The workshops and working groups form stage 2 of the process, also known as 'Co-design' – see figure 2. The MCS Foundation has completed the 'Understanding the system' phase for the whole of England which has determined key stakeholders to have involved in stage 2. Stage 1 saw the Foundation working with the lead organisation, Surrey County Council, on a stakeholder assessment. Stage 3 is the implementation of the Plan followed by stage 4 to learn and reflect before starting the process again.

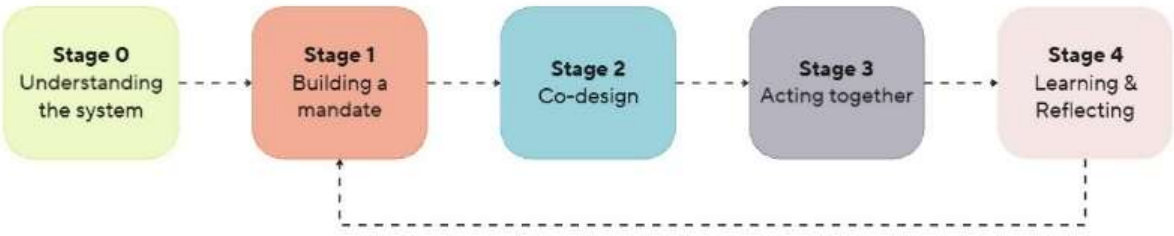

Figure 2: LARA Pilot: Co-design process

1.15. The Plan has the following defined terms:

- ACTIONS: **Things done** by people and organisations in Surrey in support of goals, by individuals or groups.
- GOALS: Something Surrey **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.

- PLAN: A **plan** for Surrey 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 Plan and offers inspiration and motivation.

1.16. The Pilot was funded and led by The MCS Foundation, a charity working to decarbonise all homes in the UK. Additional funding was provided by the Aurora Trust and the Greater South East Net Zero Hub.

1.17. The Pilot has been delivered in partnership with Ashden, National Retrofit Hub and the UK Green Building Council. The Pilot team would also like to thank Cara Jenkinson from Ashden, Rachna Leveque from Catapult, Helen Cross from Deloitte LLP, James Clarke from The Energy Saving Trust, Nikki Dekker from the Greater South East Net Zero Hub, Georgia Aristide-Oke from Innovate UK, Emma Lower from Lendology, Alex Duley from MCS Foundation, Anna Hollyman, David Adams, Joanne Wheeler, Kirsty Girvan, and Tosca Herson from UKGBC and Justin MacMillian from Which? who all supported the workshops held in Surrey. The workshops were designed by Dark Matter Labs and Collaborate CIC and delivered by The MCS Foundation and Collaborate CIC.

1.18. The biggest thank you goes to all the workshop and working group attendees. A considerable amount of time and energy was given to the project, highlighting the importance of the vision and delivery of this Plan.

Accent Housing
Activate Learning
Aura Retrofit
Brooklands College
Circular Dorking
Community Energy Pathways
Diocese of Guildford
Elmbridge Borough Council
Energy Action Redhill and Reigate
Epsom & Ewell Borough Council
Essex County Council
Furbnow
Good People
Greater South East Net Zero Hub
HACT
Happy Energy
Ichoosr
Instagroup
Lendology
MIT Skills
National Energy Foundation
National Wealth Fund
NESCOT College
NHS Surrey Heartlands ICB
National Independent Consumer Organisation
Raven Housing Trust
Raven Renewables
Reigate and Banstead Borough Council
Runnymede Borough Council
Samsung
Soltherm
Spelthorne Borough Council
Scottish and Southern Electricity Networks
Surrey Climate Commission
Surrey Community Action
Surrey County Council
Sustain Change.Org
Tandridge District Council
Surrey Community Energy
Waverley Borough Council
Your Energy Your Way
Zero Carbon Guilford

2. Vision & Mission

2.1. Overview

2.1.1. Work on the vision started during Workshop 1, attended by local authorities, training providers, social landlords, community energy organisations, government organisations and the supply chain. Please **see Workshop 1 report** for more information.

2.1.2. The vision exercise revealed several key themes shaping individual and organisational aspirations as per the below synthesised statements from the workshop (also see the Workshop 1 report). These included:

2.1.2.1. **High standards and trust** – establishing respected industry, trusted advice, consumer confidence, high standards, performance

2.1.2.2. **Delivery** – skilled workforce, coordinated approach, delivery models

2.1.2.3. **Collective action, collaboration and ownership** – collaboration, people, engaged, empowered stakeholders, joining components into a whole

2.1.2.4. **Consumer benefits** – support for residents, affordability, reduced fuel bills, quality, access for all, healthier, comfortable living

2.1.2.5. **Social outcomes** – diversity, social equity, every home matters, healthy homes, better health

2.1.2.6. **Long-term strategy** – net zero, investment, carbon reduction

2.1.2.7. **The future** – a new normal, positive vision, better future, households that want retrofit, future-proofing, move the frame, legacy and opportunity for change

2.1.2.8. **Financial considerations and market positioning** – broader perspective, people in the middle are stuck, aspirations, investable propositions

2.1.3. A working group was set up to refine the vision and this was presented at Workshop 2 and the final vision was agreed. **See Workshop 2 report** for more information.

3. Strengths, Weaknesses, Opportunities, Threats (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 Surrey'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 each of the six pillars of a retrofit system, as developed by Dark Matter Labs. The 'six pillars' are a tool to understand a system, and are 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 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 structures
    - Procurement policy e.g. community wealth building

3.1.2. After Workshop 1, the Shared Understanding Working Group met to start creating and refining a SWOT based on the Locality Assessment and outputs from the workshop. The Shared Understanding group came to Workshop 2 with a draft Vision statement and SWOT analysis, that was reviewed, critiqued and revised during the course of the workshop. The SWOT 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 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 in Workshop 3 for approval, with 98% of stakeholders agreeing with the final presentation.

3.2. Strengths

3.2.1. Strength 1: Solar Together and the Furbnow one-stop shop (OSS) pilot have both proven there is demand for retrofit in Surrey

- Further information: Solar Together provides a trusted group-buying scheme that helps residents access solar PV and battery storage at competitive prices, supporting the scale-up of local renewable energy in Surrey. 3,000 installs and £23m invested to date demonstrates considerable appetite from Surrey homeowners for retrofit. The OSS pilot meanwhile has seen over 150 Surrey households pay for a whole-house assessment and, to date, 30 have now begun deep retrofit of their homes, with Furbnow's expert coordination support.
- Response: Actions under subgoals: 1.3, 2.1, 2.1.1, 4.1, 4.1.1

3.2.2. Strength 2: A group purchasing model for heat pumps is being piloted in Surrey in 2025/26

- Further information: The scheme will offer residents a trusted, group-buying model to access competitively priced heat pumps from pre-vetted installers.
- Response: Actions under subgoals: 1.3, 2.1, 2.1.1, 4.1, 4.1.1

3.2.3. Strength 3: Several active and well-established community energy groups. Already delivering energy advice, so ready to take customers deeper into retrofit support.

- Further information: Several active and well-established community energy groups are operating in Surrey, already providing trusted energy advice and creating networks to engage residents and provide retrofit guidance to increase uptake. Zero Carbon Guildford's Home Energy Advice Team (HEAT) delivered over 2,000 home visits since December 2023 and has secured another two years' funding to continue the service in partnership with Circular Dorking and Energy Action Redhill and Reigate.
- Response: Actions under subgoals: 1.3, 2.1, 2.1.1, 2.1.2, 3.1, 3.2

3.2.4. Strength 4: Some housing archetype data

- Further information: Archetype data provides a foundation for identifying, at scale, priority property types, allowing the tailoring of retrofit solutions and targeting of interventions more effectively. This supports faster, evidence-based delivery.
- Response: Actions under subgoals: 1.3, 2.1, 2.1.1, 2.1.2, 3.1

3.2.5. Strength 5: Prior good collaboration with stakeholders around Surrey Retrofit Skills Roadmap and Skills Bootcamps

- Further information: Previous collaboration demonstrates the ability to coordinate partners and deliver targeted training, providing a foundation to scale up retrofit skills provision quickly and effectively. The newly launched second phase of Bootcamps takes a stronger focus on testing competency and improving employment outcomes for graduates.
- Response: Actions under subgoals: 1.2, 4.1, 4.1.1

3.2.6. Strength 6: Some success with hosting Energy Showcase Events

- Further information: Energy showcase events create a transparent, interactive forum that builds trust and awareness, helping residents make informed retrofit choices. These regular events offer residents the chance to quiz experts and see real-world examples.
- Response: Actions under subgoals: 1.3, 2.1, 2.1.1, 2.1.2, 3.2

3.2.7. Strength 7: More households are opening their homes via Nesta's Visit a Heat Pump scheme

- Further information: Hosted by Nesta, the Visit a Heat Pump scheme is an open-house event hosting platform that lets residents see, hear and experience a working heat pump installation and affords them the opportunity to ask practical questions about performance, noise, running costs and maintenance, and installation experiences. This approach builds trust and confidence in retrofit measures and supports informed decision making. As of July 2025, there are 35 open homes registered across nearly all parts of Surrey, meaning interested residents will not have to travel far to visit their nearest.
- Response: Actions under subgoals: 2.1, 2.1.1, 2.1.2, 3.1

3.2.8. Strength 8: Local authorities can work well together e.g. on climate and retrofit

- Further information: local authorities in Surrey have a track record of working well together on climate and retrofit initiatives, creating a strong foundation for coordinated action, shared resources, and consistent messaging.
- Response: Actions under subgoals: 1.1, 1.2, 1.3, 2.1

3.2.9. Strength 9: Growing sector with lots of opportunities

- Further information: The growth of the retrofit sector presents Surrey with an opportunity to attract new businesses, investment, and skilled workers all supporting local economic growth. The Skills Bootcamps backed by Surrey County Council and local colleges are already training new installers, showing how sector growth creates jobs while supporting faster retrofit roll-out.
- Response: Actions under subgoals: 1.2, 1.3, 2.1

3.2.10. Strength 10: BUS uptake is growing and Government is removing non-financial barriers to heat pump installs too

- Further information: There were almost double the number of Boiler Upgrade Scheme (BUS) redemptions (heat pump installs) in Surrey in 2024/25 compared to 2023/24. Moreover, homeowners can now access the full £7,500 Boiler Upgrade Scheme grant for heat pumps without having to install loft or cavity wall insulation first and, in May 2025, planning permission barriers were reduced including the '1 metre boundary' rule. This has removed barriers, helping even more households switch to heat pumps in 2025/26.
- Response: Actions under subgoals: 2.1, 2.1.1, 3.1, 4.1, 4.1.1

3.2.11. Strength 11: Slight improvement in knowledge about heat pumps in recent years

- Further information: Even small rises in public knowledge and familiarity of heat pumps help speed retrofit by shifting more homeowners into the 'ready-to-consider' zone. With around 329,000 (approximately 65%) of Surrey homes at SAP D or below, a modest increase of homeowner knowledge could potentially mobilise tens of thousands of additional households toward heat pump adoption. This is sorely needed as the monthly rate of heat pump installations in Surrey will need to increase to be on average 40 times higher over the next 25 years than it has been over the last 3 years of the BUS scheme.
- Response: Actions under subgoals: 2.1, 2.1.1, 2.1.2, 3.1, 3.2, 4.1, 4.1.1.

3.2.12. Strength 12: Performance on fuel poor and social housing grant schemes delivery

- Further information: Successfully managing multi-million-pound funding programmes shows systems are in place to deliver retrofit in Surrey, and there is scope for future expansion. Examples include the £2.8m worth of upgrades delivered through HUG2; the almost £7m being delivered in social housing through the Social Housing Decarbonisation Fund (SHDF) Wave 2.2; and the success in securing a combined £28.3m via the Warm Homes Plan (£13.9m Local Grant and a total of £14.4m from the Social Housing Fund, including match funding) to support energy efficiency updates to thousands more properties. Other housing providers operating in the area are also gaining experience delivering retrofit in their stock outside of Surrey.
- Response: Actions under subgoals: 1.1, 3.2

3.2.13. Strength 13: Good relationship between borough and district councils and social landlords

- Further information: Surrey's boroughs and social landlords have worked together to secure funding, share property data, and streamline installations. A good relationship

between borough and district councils, and social landlords in Surrey enables joined-up planning, faster project delivery, and coordinated retrofit programmes maximising impact. Other benefits include the alignment of priorities, reduction of administrative barriers, and ability to scale retrofit efforts effectively.

- Response: Actions under subgoals: 1.1, 1.2, 1.3, 2.1, 4.1, 4.1.1

3.2.14. Strength 14: Quality controls ensuring good installers

- Further information: All installers delivering work through previous Action Surrey schemes must meet strict standards and have accreditation with bodies including MCS and Trustmark. Solar Together and Furbnow installers are similarly vetted and undergo comprehensive assessments. These controls mean Surrey residents accessing retrofit measures through trusted schemes benefit from reliable installers, better-quality outcomes, and recourse if issues arise. This provision increases public confidence, reduces failure rates, and supports sustainable market growth.

- Response: Actions under subgoals: 4.1, 4.1.2

3.2.15. Strength 15: Better data on heat pump and solar rollout, and EV chargers and batteries is available through the SSEN and UKPN public data stores at substation level

- Further information: This level of data provides granular insight into where low-carbon technologies are being deployed, enabling targeted planning, faster capacity allocation, and smarter rollout strategies across Surrey. Evidence based targeting can help authorities plan smarter and prioritise investment.

- Response: Actions under subgoals: 1.2

3.2.16. Strength 16: £38m of investment already secured via government grant or private investment, excluding social housing.

- Further information: The fact that £38m has already been leveraged for domestic retrofit (excluding social housing) via local authorities' climate change strategies shows that the region has a proven ability to secure significant funding, coordinate delivery, and mobilise retrofit at scale.

- Response: Actions under subgoals: 3.2

3.2.17. Strength 17: Good Practice in Woking on heat networks can be a model for other towns

- Further information: Woking's heat network successes in terms of attracting funding, its delivery and operation and pioneering nature is a potential blueprint for retrofit Acceleration.

- Response: none

3.2.18. Strength 18: Some councils have good relationships with social landlords

- Further information: Some Boroughs and Districts have good relationships with social landlords through historic joint working. These relationships can be built on to help to ensure retrofit delivery is coordinated both locally and strategically, maximising impact across social housing and aligning with Surrey's broader climate goals.

- Response: Actions under subgoals: 1.1, 4.1, 4.1.1

3.3. Weaknesses

3.3.1. Weakness 1: Hesitancy of local authorities to make decisions

- Further information: Hesitancy among local authorities to make decisions slows down the pace of retrofit delivery, creates uncertainty for supply chains, and risks missing funding opportunities, holding back wider rollout. Surrey's success in schemes like Solar Together and HUG2 shows what's possible with decisive leadership.
- Response: Actions under subgoals: 1.1, 1.2, 1.3, 2.1,

3.3.2. Weakness 2: Lack of cohesion of different local authorities' separate plans.

- Further information: In Surrey, boroughs, districts, and the county council have their own climate and energy plans, which are often developed independently. Coordinated county-wide retrofit action requires collective buy-in and alignment from every council, otherwise, efforts could remain fragmented. A county-wide retrofit Plan that aligns with existing local authority plans, whilst maximising the opportunities from Local Government Reorganisation, can provide clear, shared priorities, consistent messaging, and delivery pathways will address this weakness., shared priorities, consistent messaging, and delivery pathways will address this weakness.
- Response: Actions under subgoals: 1.1, 1.3, 2.1, 4.1

3.3.3. Weakness 3: Lack of personnel within stakeholders (particularly local authorities)

- Further information: A shortage of personnel, both within local authorities and the wider retrofit supply chain limits capacity to plan, coordinate, and deliver retrofit schemes at the necessary scale and pace, directly slowing progress. Issues including capacity gaps, delivery bottlenecks, install capacity shortages, burnout and knowledge loss will prevail unless personnel shortages are addressed.
- Response: Actions under subgoals: 1.1, 1.2, 1.3,

3.3.4. Weakness 4: Low take up of retrofit courses in Surrey; lack of understanding about the barriers to take up

- Further information: Low take-up of retrofit training courses, combined with insufficient understanding of the barriers preventing participation, can limit workforce growth and slow delivery capacity, making it harder to meet retrofit targets at scale.
- Response: Actions under subgoals: 1.2, 3.2, 4.1, 4.1.2

3.3.5. Weakness 5: EPC ratings are unreliable

- Further information: EPC ratings (Energy Performance Certificates) are often inaccurate, or out of date, meaning retrofit decisions can be poorly targeted, funding may not reach the right homes, and residents or landlords lack reliable information to act with confidence. Supplementing EPCs with archetype data, in-home assessments, and smarter diagnostics could help overcome this barrier.
- Response: Actions under subgoals: 2.1, 2.1.1, 2.1.2

3.3.6. Weakness 6: EPC methodology is discredited for heat pumps and other renewables

- Further information: The current EPC methodology often underestimates the performance of heat pumps and other renewable technologies making them appear less effective or cost-efficient than they are. This undermines public confidence, creates misleading signals for homeowners and landlords, and can limit eligibility for funding schemes tied to EPC ratings

- Response: Actions under subgoals: 2.1, 2.1.1, 2.1.2

3.3.7. Weakness 7: Inconsistent training

- Further information: Inconsistent training provision undermines workforce quality, slows retrofit delivery, increases installation risks, and reduces public trust; highlighting the urgent need for standardised, high-quality training aligned with market needs.
- Response: Actions under subgoals: 1.2, 4.1, 4.1.2

3.3.8. Weakness 8: Lack of finance offer for middle audience segment who are said to make up 80% of residents.

- Further information: The lack of accessible finance offers for Surrey's middle-income households which are estimated to make up around 80% of residents is a critical weakness that slows mass retrofit uptake, limits market growth, and risks deepening inequalities. Unlocking tailored finance solutions is essential to scale retrofit at pace.
- Response: Actions under subgoals: 3.1

3.3.9. Weakness 9: High compliance requirements of grant schemes with lots of complexity

- Further information: The high complexity and strict compliance requirements in relation to retrofit grant schemes creates significant barriers for residents, SMEs, and delivery partners, slowing uptake, increasing administrative burdens, and undermining the pace and scale of retrofit.
- Response: Actions under subgoals: 1.1, 1.2, 1.3, 2.1, 3.2

3.3.10. Weakness 10: Surrey County Council has little direct control over private landlords and limited relationship with social landlords, who have competing priorities

- Further information: Surrey County Council's limited direct control over private landlords and limited relationship with social landlords, combined with their competing operational priorities, creates a fragmented retrofit landscape, making it harder to align housing decarbonisation across tenures with county-wide climate goals and slowing progress. Despite this, as per strength 18, Surrey County Council could build good working relationships with both private landlords and social landlords in the region.
- Response: Actions under subgoals: 1.1

3.3.11. Weakness 11: Not all data is openly shared

- Further information: When organisations don't share data, and there is limited open access to rich housing stock data, it causes delays and obstructions which hamper progress, drive up costs and add administrative burdens. All these add to the difficulty to pursue a systemic approach to accelerating retrofit.
- Response: Actions under subgoals: 1.1, 1.2, 1.3

3.3.12. Weakness 12: Data quality when it comes to housing stock

- Further information: Poor housing stock data weakens retrofit efforts by making it difficult to accurately identify property types, condition, tenure and energy performance, leading to delays, the installation of inappropriate measures and inefficient use of resources.
- Response: Actions under subgoals: 1.1, 1.3

3.3.13. Weakness 13: While many community groups are willing to participate as advocates, they are limited by capacity and resources and need support to professionalise.

- Further information: Many community groups are enthusiastic about accelerating retrofit and are willing to act as advocates, however their impact is constrained by limited capacity and resources. Additional support for these groups may be required to leverage their expertise and often trusted local voice.
- Response: Actions under subgoals: 1.1, 2.1, 2.1.2, 3.2

3.3.14. Weakness 14: Lack of vehicle to leverage private investment into sector to accelerate mass uptake

- Further information: The absence of a structured vehicle to leverage private investment significantly limits the scale and pace of retrofit delivery. Without a clear, trusted mechanism to attract and deploy private investment at scale, it is difficult to mobilise the funding needed for mass retrofit, limiting market growth, stalling delivery beyond public grant schemes, and slowing progress toward county-wide decarbonisation targets.
- Response: Actions under subgoals: 3.2

3.4. Opportunities

3.4.1. Opportunity 1: Surrey councils engaging more private and social landlords

- Further information: Engaging more private and social landlords across Surrey represents a key opportunity to scale retrofit delivery, target priority homes, attract additional funding, and support workforce growth. The expected introduction of a tightened (to EPC C rather than EPC E) Minimum Energy Efficiency Standard (MEES) in 2026 by Government can provide additional leverage provided LAs also receive proportionate funding to enforce it.
- Response: Actions under subgoals: 1.1, 1.3

3.4.2. Opportunity 2: Local authorities are a trusted brand

- Further information: local authorities' status as a trusted brand presents a significant opportunity to drive retrofit uptake across Surrey; helping residents navigate the retrofit market, boost confidence in measures, and build momentum towards large-scale delivery. Solar Together Surrey, Action Surrey, and Surrey HEAT service are specific examples of how Surrey's local authorities have successfully used their trusted brands to promote retrofit.
- Response: Actions under subgoals: 1.1, 2.1, 2.1.1, 2.1.2,

3.4.3. Opportunity 3: Some conservation organisations are against solar farms and wind turbines. Opportunity to engage with them to actively set some decarbonisation goals for themselves.

- Further information: Opposition from influential groups limits the deployment of large-scale renewable energy within Surrey, constrains decarbonisation options, and risks polarising public debate. However, engaging these groups to take ownership of alternative decarbonisation actions, including retrofit, presents an opportunity to align landscape protection with climate goals and foster constructive collaboration.
- Response: Actions under subgoals: 2.1

3.4.4. Opportunity 4: UK law to be Net Zero by 2050

- Further information: Net Zero 2050 is a powerful unifying target. It provides a unifying legal framework, creating the conditions for policy certainty, investment mobilisation, and coordinated action over time. It enables Surrey to set credible interim targets, breaking retrofit into manageable phases with measurable progress. Surrey County Council (SCC) and other local stakeholders have made ambitious commitments to align with Net Zero by 2050, with interim targets in SCC's Climate Change Strategy that include a commitment to reduce carbon emissions from housing by 66% by 2035.
- Response: Actions under subgoals: 1.1, 2.1

3.4.5. Opportunity 5: Huge potential retrofit market

- Further information: Surrey's large, diverse housing market with over 500,000 domestic properties and substantial population size create a significant opportunity to scale retrofit delivery, providing the critical mass needed to grow the supply chains, attract investment, and normalise energy efficiency and low-carbon technologies across communities.
- Response: Actions under subgoals: 1.1, 1.2, 3.1, 4.1, 4.1.1

3.4.6. Opportunity 6: Opportunity to connect social housing providers in the area, building relationships for future collaboration

- Further information: Connecting and building stronger relationships between social housing providers in Surrey presents a key opportunity to coordinate retrofit delivery, secure funding, grow the supply chain, and decarbonise social homes more efficiently, laying the foundations for long-term, large-scale collaboration.
- Response: Actions under subgoals: 1.1, 1.3, 4.1, 4.1.1

3.4.7. Opportunity 7: Community energy groups are well placed to reach people with bespoke support from vulnerable to able to pay

- Further information: Community energy groups across Surrey are uniquely placed to reach residents with trusted, tailored retrofit support; whether vulnerable or able-to-pay, providing a major opportunity to drive uptake by meeting people where they are and building confidence in retrofit. The HEAT team's securing of an additional 2 years' funding is a fantastic opportunity to build on their over 2,000 home visits to date.
- Response: Actions under subgoals: 1.1, 2.1, 2.1.1, 2.1.2, 3.2

3.4.8. Opportunity 8: Funded schemes for retrofit measures

- Further information: Surrey's deployment of multiple funded retrofit schemes in recent years shines a light on what is possible when engaging with funded schemes and grants focusing on helping fuel poor, inefficient households. The upcoming Warm Homes Plan offers Surrey an opportunity to further accelerate domestic retrofit beyond what has already been achieved, with a total £28.3m pledged across the Local Grant and Social Housing Fund.
- Response: Actions under subgoals: 1.1, 2.1, 2.1.2, 3.2, 4.1, 4.1.1

3.4.9. Opportunity 9: Social value requirements in contracts between public sector and contractors

- Further information: Surrey County Council builds in a minimum 10% social value contribution into contracts. Requiring suppliers to deliver additional social, economic, or environmental benefits through contracts creates a clear mechanism to align procurement with Surrey's retrofit and climate priorities, leveraging wider outcomes

such as local jobs, skills development, and community engagement and benefit alongside carbon reduction.

- Response: Actions under subgoals: 1.1, 1.2, 2.1, 2.1.2, 4.1, 4.1.1

3.4.10. Opportunity 10: Regular accurate information made available in local press and events; Stress case studies with real people

- Further information: Providing consistent, accurate information through trusted local channels, combined with relatable case studies from real Surrey residents builds public confidence, normalises retrofit, and helps overcome misinformation, making it easier to drive uptake of retrofit measures.

- Response: Actions under subgoals: 1.3, 2.1, 2.1.1, 2.1.2

3.4.11. Opportunity 11: Opportunity to engage tenants in a democratic process around this

- Further information: Engaging tenants in a democratic, participatory process around retrofit decisions builds trust, increases acceptance of works, and empowers residents to shape solutions that work for them. This could help reduce resistance, improve satisfaction, and accelerate the delivery of social housing decarbonisation across Surrey.

- Response: Actions under subgoal: 2.1

3.4.12. Opportunity 12: Forums that strengthen the link between skills providers with employers such as the Surrey GSAP

- Further information: Strengthening forums like the Surrey Green Skills Advisory Panel (GSAP), which had its inaugural meeting in July 2025, connects skills providers with employers and presents a major opportunity to accelerate retrofit by ensuring training is aligned with market needs, building a reliable local workforce, and supporting scalable, high-quality delivery across Surrey.

- Response: Actions under subgoals: 1.2, 4.1, 4.1.2

3.4.13. Opportunity 13: Data identified as a key to understanding the use of low carbon technologies in people's homes through smart monitoring

- Further information: Digital tools and smart data platforms provide real-time insights into energy performance, enabling more targeted, efficient, and impactful retrofit delivery across Surrey. Solutions like Switchee demonstrate how technology can support proactive decision-making, tenant engagement, and better outcomes, particularly in social housing.

- Response: Actions under subgoals: 1.3

3.4.14. Opportunity 14: Devolution may create efficiencies in terms of funding and lead to the right decisions at the right level

- Further information: Gaining greater control over funding and decision-making could create significant efficiencies in retrofit delivery by simplifying access to resources, aligning priorities, and enabling more strategic, coordinated use of public and private investment, as well as more responsive, coherent, and accountable retrofit delivery at pace. The Government's Devolution White Paper promises a consolidated budget via Integrated Settlement for new Mayoral Strategic Authorities (MSA) with devolution of retrofit funding by 2028 and a clear role for the MSA in the wider energy system, including Local Area Energy Planning (LAEP), heat network zoning, and green jobs and skills coordination. In February 2025, Surrey was selected for the Local Government Reorganisation fast track.

- Response: Actions under subgoals: 1.1

3.4.15. Opportunity 15: Broaden understanding of low Carbon Technologies. e.g. rainwater harvesting, battery storage, solar PV, Heat pumps etc

- Further information: Expanding public understanding of the full range of low carbon technologies including solar PV, battery storage, heat pumps, and insulation empowers more residents to take informed action, supports integrated whole-home retrofit, and increases demand across Surrey, helping to normalise low-carbon living.
- Response: Actions under subgoals: 1.3, 2.1, 2.1.1, 2.1.2, 3.1, 4.1

3.4.16. Opportunity 16: Devolution could lead to right decisions at right level

- Further information: Surrey's devolution plans; unitisation, mayoral leadership and devolved funding could present a significant opportunity to accelerate retrofit in the region, and could lead to more responsive, coherent, and accountable retrofit delivery at pace.
- Response: Actions under subgoals: 1.1

3.4.17. Opportunity 17: Work by University of Surrey on intertwined stakeholder ownership model for climate action that breaks down silos

- Further information: Ongoing work being undertaken by the University of Surrey with input from Surrey County Council, with the goal of a more linked up stakeholder ownership model, namely 'mesh governance', for accelerating climate action and breaking down silos (see Climate Action Network study on multi-level climate governance in Surrey, examining how distributed decision-making across parishes, boroughs, and county can mesh together more effectively).
- Response: Actions under subgoals: 2.1, 4.1

3.4.18. Opportunity 18: To use this as an opportunity to encourage an improvement in data quality of housing stock

- Further information: Retrofit programmes create a valuable opportunity to improve the quality, consistency, and completeness of housing stock data. This provides the intelligence needed to better target future retrofit, prioritise investment, track progress, and plan area-based delivery more efficiently across Surrey.
- Response: Actions under subgoals: 1.3

3.4.19. Opportunity 19: Warm Homes Local Grant (WHLG) allocation is an opportunity to expand fuel poor offer, with longer term programme (3 years) announced, that should be slightly more straightforward to administer, and with potential positive spillover for wider programme

- Further information: The WHLG provides Surrey with a new, multi-year funding stream to support fuel-poor households with energy efficiency improvements. Its longer timeframe, simplified administration, and potential to complement wider retrofit schemes make it a strategic opportunity to tackle fuel poverty and generate momentum for broader retrofit uptake across the county.
- Response: Actions under subgoals: 1.1, 1.3, 3.2

3.5. Threats

3.5.1. Threat 1: Community groups lack a mandate to operate in this space and without a mandate there is no power or funding.

- Further information: Community groups are well placed to engage residents and support retrofit, but without a formal mandate such as recognised roles in delivery programmes, clear political backing, or access to funding, their ability to contribute is limited. This weakens Surrey's resource capacity, and ability to build public trust, drive behaviour change, and deliver retrofit at the neighbourhood level.
- Response: Actions under subgoals: 1.3, 2.1, 2.1.1, 2.1.2, 3.2

3.5.2. Threat 2: Social landlords prioritising other elements over this work due to a lack of resources

- Further information: social landlords face competing pressures. Prioritising other pressures over retrofit due to resource constraints could delay the decarbonisation of social housing in Surrey, limit funding uptake, and weaken retrofit delivery and progress towards the county's climate targets.
- Response: Actions under subgoals: 1.1, 1.3, 4.1, 4.1.2

3.5.3. Threat 3: Inconsistent quality assurance/ checks in place

- Further information: Inconsistent quality assurance (QA) and checks across retrofit schemes undermine installation standards, reduce resident trust, and risk poor performance outcomes resulting in slow uptake, damage to the sector's reputation, and increased likelihood of retrofit delivery stagnating.
- Response: Actions under subgoals: 2.1

3.5.4. Threat 4: Plans are derailed by inaccurate data re. housing stock

- Further information: Inaccurate, outdated, or incomplete data on Surrey's housing stock undermines effective planning, targeting, and delivery of retrofit programmes; leading to wasted resources, missed opportunities, and delays in scaling up home retrofit.
- Response: Actions under subgoals: 1.3

3.5.5. Threat 5: Some Gas Safe qualified engineers are actively dissuading residents from fitting heat pumps; a national problem

- Further information: Gas Safe registered engineers are a trusted source for heating advice, especially for boiler replacements. When they actively dissuade residents from adopting heat pumps, whether due to lack of knowledge, vested interests, or misconceptions, it undermines public confidence in low-carbon heating and slows heat pump uptake.
- Response: Actions under subgoals: 2.1, 2.1.1, 4.1

3.5.6. Threat 6: Active lobbying by the gas industry in the press has a major impact on residents' appetite for low carbon technology

- Further information: Active lobbying and media campaigns promoting fossil fuel options over low carbon alternatives create confusion and undermine public confidence, posing a significant threat to retrofit uptake and slowing retrofit progress.
- Response: Actions under subgoals: 2.1, 2.1.1, 2.1.2

3.5.7. Threat 7: Surrey doesn't yet have a Local Area Energy Plan

- Further information: The absence of a Local Area Energy Plan (LAEP) is a key threat to accelerating retrofit, limiting the ability to strategically target interventions, align with grid capacity, and plan infrastructure upgrades, which increases costs, delays delivery, and reduces market confidence in low-carbon transition programmes.
- Response: Actions under subgoal: 1.3

3.5.8. Threat 8: Devolution uncertainties

- Further information: Devolution uncertainties present a threat to accelerating retrofit by delaying strategic decisions, weakening collaboration, reducing market confidence, and risking disruption to funding and delivery structures. Uncertainty limits Surrey's ability to progress initiatives like LAEPs.
- Response: Actions under subgoals: 1.1, 1.3

3.5.9. Threat 9: Council/public sector funding landscape is always uncertain, which constrains ability of councils to invest own money, leading to overreliance on grants

- Further information: Uncertainty in public sector funding can constrain public sector funding and investment in retrofit, leading to overreliance on short-term, competitive grants. Stable, long-term funding would enable coordinated, area-based delivery. Fragmented delivery caused by inconsistent funding can reduce public awareness, trust, and political will to prioritise retrofit.
- Response: Actions under subgoals: 1.1, 1.3

3.5.10. Threat 10: Schemes starting and stopping

- Further information: The frequent starting and stopping of retrofit schemes undermines delivery momentum, damages public trust, weakens the supply chain, and prevents scalable, efficient retrofit programmes. Short-lived schemes make it extremely difficult to implement coordinated, long-term neighbourhood or whole-street retrofit programmes and increase delivery costs.
- Response: Actions under subgoals: 1.1, 3.2, 4.1, 4.1.1

3.5.11. Threat 11: OFGEM pricing rules continue to make heat pumps only slightly cheaper than gas boilers without time of use tariffs

- Further information: Current pricing rules which keep electricity costs high relative to gas, limit the economic case for heat pumps. Reforming levy structures alongside wider access to time-of-use tariffs, is critical to unlocking affordable, large-scale heat pump uptake.
- Response: Actions under subgoals: 2.1, 2.1.1, 2.1.2, 3.2

3.5.12. Threat 12: Homeowners don't want to take out loans for retrofit

- Further information: In Surrey, where homeownership rates are high and many residents are financially comfortable, the reluctance of homeowners to take on personal loans for retrofit is a significant barrier. Even among affluent groups, resistance to borrowing slows uptake of retrofit measures, limiting the potential to decarbonise Surrey's large owner-occupied housing stock.
- Response: Actions under subgoals: 3.1, 3.2

4. Shared Principles

4.1. Introduction

4.1.1. During Workshop 2, participants engaged in a systems simulation game to explore principles and strategies for collaborative retrofit initiatives in Surrey. 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 Surrey's retrofit system.

4.1.2. Key principles for a better retrofit system were found, 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 Plan. The governance agreements between signatories to the Plan will formally ensure their importance. The principles below have influenced the goals and actions and are critical in achieving the vision.

4.2. Principles Selection

4.2.1. During Workshop 2, participants engaged in a systems simulation game to explore principles and strategies for collaborative retrofit initiatives in Surrey. The simulation aimed to create an engaging and collaborative setting for participants to: Simulate teamwork in a dynamic environment, explore actionable ideas relevant to Surrey, test different approaches to change, identify key priorities, and foster experimentation and creativity in problem-solving. The exercise highlighted challenges like the need for: greater levels of coordination, a common goal to avoid action in self-interest and coordination of efforts in round 1. This evolved into greater collaboration, shared goals, and efficient resource use and a reflection that a coordinating body is required to direct retrofit in Round 2. Groups then used this learning to reflect on real-life changes they want to see in Surrey's retrofit system.

4.2.2. Key principles for a better retrofit system were identified, including: collaborative, inclusive, people-centred, ambitious and pragmatic and trustworthy, reliable and we act with integrity.

5. Outcomes

5.1. Outcomes Identified

5.1.1. During Workshop 3, time permitted for participants to engage in only a relatively short exercise to begin to develop potential Outcomes, with the outputs of this exercise listed below. It was acknowledged they would require further refinement.

- Consortiums working well to deliver efficiencies, expectations and built trusting relationships
- Coherent menu of grant schemes for all requiring them
- Good understanding of grant schemes across system
- Finance options available for supply chain development and training

- Coordinated homeowner communications being delivered by range of system partners including public health
- Exponential growth of interest in funded schemes and installation of measures
- People know where to go for retrofit advice and have confidence in the advice
- People feel the benefits of retrofit are relevant to them and worth the hassle
- People aware of and able to access finance and grants i.e. feel empowered to do something to help themselves
- People talking about the positives of retrofit
- Private investment in retrofit is unlocked and being made
- Residents actively accessing independent advice (technical, grants, finance) through a single point
- Suitably sized and skilled local supply chain
- Diverse supply chain

5.1.2. These outputs were then summarised into a more concise set of Outcomes for the first draft of the main Plan document, with the results below:

- Increased trust, knowledge and confidence
- Effective partnerships
- Coordinated delivery
- Expanded resources
- Sustainable sector growth
- Inclusive empowerment
- Future-fit homes

5.1.3. These were then further revised once more, with oversight of the Interim Steering Group, to produce the final set of Outcomes in the main Plan document.

5.2. Outcomes Tracking

5.2.1. See the main Plan document for suggested quantitative KPIs and qualitative metrics.

5.3. Monitoring, Evaluation, Accountability and Learning (MEAL) Framework

5.3.1. A key part of delivering the Plan is determining what is working and what isn't working and developing amplification or rectification plans respectively. System change can be difficult to monitor and be confident of the connection between cause and effect. However, it is important to try and understand the impact being made and report this to stakeholders and external bodies such as funders.

5.3.2. A MEAL Framework is a structured approach to track progress and assess the effectiveness of an intervention. It outlines how data will be collected, analysed, and used to inform decision-making

and improve outcomes. The framework helps ensure that efforts are on track, resources are used efficiently, and intended results are achieved.

5.3.3. A MEAL framework will need to be developed for the Plan based on the metrics set out above. Collaborate CIC have separately provided a template framework for completion. Another recommended framework is the Build Upon framework which UKGBC and the European GBC co-developed to help cities and local authorities consistently measure the broad benefits of retrofit. The Interim Steering Group will oversee the development of this framework. This will include agreeing an appropriate progress reporting and communication schedule.

6. Goals and Actions

6.1. Introduction

6.1.1. The following goals and sub-goals have been determined by the workshop stakeholders:

1. **Build a collaborative structure to coordinate working practices**
    - 1.1. Improve coordination of funding mechanisms
    - 1.2. Improve coordination of local supply chain
    - 1.3. Improve coordination of demand generation activities
2. **Build confidence in retrofit through clear information, trusted advice & guidance**
    - 2.1. Improve awareness, understanding and confidence in all households
        - 2.1.1. Build confidence in households facing lower barriers
        - 2.1.2. Build confidence in households facing higher barriers
3. **Facilitate access to flexible, accessible funding & finance**
    - 3.1. Enable those who are facing lower barriers to access finance to undertake retrofit
    - 3.2. Improve access for households facing higher barriers to funded schemes
4. **Develop a skilled, trusted and stable local supply chain & skills base**
    - 4.1. Support and grow our local supply chain and skills base through sector collaboration
        - 4.1.1. Support & grow local supply chain
        - 4.1.2. Support and improve local skills base

Note, see the Definitions section in the main Plan document for more information on how 'households facing lower/higher barriers' are defined.

6.1.2. The Pilot team took the findings from Workshop 2 and started drafting potential actions reflecting where stakeholders want to be, the vision, and the agreed priorities and principles. Indicative actions were presented, refined and reviewed at Workshop 3. Following the conclusion of the three workshops, the MCS Foundation and Surrey County Council leads reviewed the actions outputted by the workshops and agreed on actions to take forward.

6.1.3. Each action has the following further information:

- CONTEXT/ ASUMPTIONS: The problem or issue the action is planning to affect and the assumptions made to justify the desired action
- APPROACH: High-level plan of how the action could be completed

- RESOURCES: Estimated resources needed to deliver the action in terms of money, roles and stakeholders involved
- LINKS: Actions that need to be completed beforehand or are importantly linked
- STRATEGIC FIT: Which element of the SWOT the action responds to
- DIRECT BENEFICIARIES: Who the 'direct beneficiaries' that will see the primary benefit of the action are

6.2. Priority Actions

6.2.1. The Plan provides a high-level list of actions to be completed to achieve each goal. Information is given on the actions that need to be completed prior to an action (pre-actions or 'PA').

However, stakeholders will need to develop a more detailed timeline at the appropriate time. Initial recommended priority actions are set out in the main Plan document with additional detail below as appropriate.

6.2.1.1. Set up interim steering group

6.1.1.1.1. See main Plan document

6.2.1.2. Backbone organisation

6.2.1.2.1. The effective delivery of the Plan will require it to be 'held' by one organisation which is referred to as the 'backbone' organisation. A backbone organisation is a 'dedicated entity that provides support and coordination for collaborative initiatives aimed at achieving a shared goal, often within a community or sector. It acts as a central hub, facilitating communication, strategy development, and resource mobilization among participating organisations.' The Plan requires collaboration and cooperation to succeed and assumes democratic decision-making processes. However, it is likely progress will be difficult without the backbone organisation.

6.2.1.2.2. During Workshop 3 it was agreed that in the medium-to-longer term a 'hybrid model' would be pursued whereby a new entity would perform the operations of the 'backbone organisation', succeeding SCC and the Interim Steering Group, and will mobilise the Plan implementation at pace. The hybrid model may combine an entity such as a Community Interest Company (CIC) for oversight and strategic direction and to provide the functions of backbone organisation; a Special Purpose Vehicle (SPV) for project-specific investment and management; and a forum(s) for wider consultation with the stakeholder network. As above, the Interim Steering Group will be tasked with agreeing, implementing and communicating this successor structure with a clear route explained on how the wider network can contribute.

6.2.1.2.3. In the short term, this role and the interim backbone organisation will be taken on by Surrey County Council.

6.2.1.3. Roles

6.2.1.3.1. See main Plan document

6.2.1.4. MEAL Framework

6.2.1.4.1. **Section 5.3** provides guidance on setting up a Monitoring, Evaluation, Accountability and Learning (MEAL) framework.

6.2.1.5. Warm Homes funding

6.2.1.5.1. See main Plan document. It is important to convene grant recipient organisations to determine project scope and look for ways to work together. Such activity could be through coordinated procurements, joint procurements, centralised delivery teams, partnership delivery or working in the same delivery locations. See action 3.2D for more information.

6.2.1.6. Forums

6.2.1.6.1. See main Plan document

6.2.1.7. Data Management

6.2.1.7.1. See main Plan document. The work can utilise best practice frameworks such as LETI[1] or the Build Upon framework[2] to understand the use of low carbon technologies in people's homes.

6.3. Sub-goal 1.1: Improve coordination of funding mechanisms

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

- Strengths: 8, 12, 13, 18
- Weaknesses: 1,2, 3, 9, 10, 11, 12, 13
- Opportunities: 1, 2, 4, 5

6.3.2. Action 1.1 A: Create Grant Scheme Support and Coordination role or allocate to existing

6.3.2.1. **Context/ Assumptions**:

- Resource is needed to ensure funding opportunities are realised by as many organisations in the locality as possible and that efficiencies are maximised
- Coordination of grant schemes can achieve better outcomes
- Grant schemes are available that support achievement of the vision

6.3.2.2. **Approach**: Backbone organisation to develop job description, agree with Interim Steering Group, consult with stakeholders, and agree whether role will be recruited to or allocated to existing.

6.3.2.3. **Resources**:

- Money: c. £40k per year
- Roles: Backbone organisation

[1] https://www.leti.uk/
[2] https://ukgbc.org/resources/build-upon-framework-capturing-the-benefits-of-building-renovation/

- Stakeholder(s): All

6.3.2.4. **Links**:

- Pre-action(s): None

6.3.2.5. **Strategic fit**:

- Strengths: 12, 13
- Opportunities: 1
- Direct beneficiaries: Local authorities, social landlords

6.3.3. Action 1.1 B: Conduct stakeholder mapping of organisations involved in delivery of funding programmes

6.3.3.1. **Context/ Assumptions**:

- Several organisations in the locality are involved in funded retrofit programmes but there isn't a central database of this knowledge
- Understanding who is delivering funded retrofit activity will help to deliver better outcomes

6.3.3.2. **Approach**: Grant Scheme Support and Coordination role supported by Research & Data role to conduct stakeholder assessment (see priority roles in 7.2.1.1), review with Interim Steering Group and then all stakeholders and put in place processes to ensure continual flow of information going forward.

6.3.3.3. **Resources**:

- Money: To be determined
- Roles: Grant Scheme Support and Coordination, Research & Data roles
- Stakeholders: Community energy organisations, health, local authorities, social landlords

6.3.3.4. **Links**:

- Pre-action(s): 1.1A

6.3.3.5. **Strategic fit**:

- Opportunities: 1
- Direct beneficiaries: Local authorities, social landlords

6.3.4. Action 1.1 C: Set up forum for local authorities and social landlords to share knowledge and build collaborations

6.3.4.1. **Context/ Assumptions**:

- Local authorities and social landlords are currently involved with the majority of retrofit activity
- A forum can be an effective way to exchange information and build collaborations

- Collaboration and sharing knowledge deliver better outcomes for all

6.3.4.2. **Approach**: Grant Scheme Support and Coordination role uses information from action 1.1B to develop forum, acts as secretariat for forum, develops draft terms and conditions, approved by Interim Steering Group and forum membership, with data collected and disseminated by Research & Data role. Terms of Reference should ensure forum membership is regularly reviewed to ensure inclusivity.

6.3.4.3. **Resources**:

- Money: To be determined
- Roles: Grant Scheme Support and Coordination, Research & Data roles
- Stakeholder(s): Local authorities, social landlords

6.3.4.4. **Links**:

- Pre-action(s): 1.1B

6.3.4.5. **Strategic fit**:

- Strengths: 8, 12, 13, 18
- Weaknesses: 2, 3, 10
- Opportunities: 1, 6, 8, 9, 19
- Threats: 2
- Direct beneficiaries: Local authorities, social landlords

6.3.5. Action 1.1 D: Develop agreement on how stakeholders can coordinate delivery of grant schemes to maximise benefits

6.3.5.1. **Context/ Assumptions**:

- Coordination of grant schemes can achieve better outcomes
- An agreement can be found to enable the achievement of better outcomes
- Funding agreement terms will allow for coordination activity

6.3.5.2. **Approach**: Grant Scheme Support and Coordination role to consult with grant delivery stakeholders and develop coordination plan, agree with Interim Steering Group, consult with stakeholders and implement.

6.3.5.3. **Resources**:

- Money: To be determined
- Roles: Grant Scheme Support and Coordination role
- Stakeholder(s): Community energy organisations, health, local authorities, social landlords

6.3.5.4. **Links**:

- Pre-action(s): 1.1C

6.3.5.5. **Strategic fit**:

- Strengths: 8, 12, 13, 18

- Weaknesses: 1, 2, 9, 10, 11, 12, 13
- Opportunities: 1, 4, 5, 6, 8, 9, 14, 16, 19
- Threats: 2, 8, 10
- Direct beneficiaries: Homeowners, tenants, local authorities, social landlords

6.4. Sub-goal 1.2: Improve coordination of local supply chain

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

- Strengths: 5, 8, 9, 13, 15
- Weaknesses: 1, 3, 4, 7, 9, 11
- Opportunities: 5, 9, 12

6.4.2. Action 1.2 A: Create Retrofit Supply Chain Development role or allocate to existing

6.4.2.1. **Context/ Assumptions**:

- Resource is needed to ensure the supply chain capacity is increased in line with demand and quality is improved
- Interventions can be made which help to support growth in supply chain capacity and improve capacity

6.4.2.2. **Approach**: Backbone organisation to develop job description, agree with Interim Steering Group, consult with stakeholders, and agree whether role will be recruited to or allocated to existing.

6.4.2.3. **Resources**:

- Money: c. £40k per year
- Roles: Backbone organisation
- Stakeholder(s): All

6.4.2.4. **Links**:

- Pre-action(s): None

6.4.2.5. **Strategic fit**:

- Opportunities: 5
- Direct beneficiaries: Supply chain, training providers

6.4.3. Action 1.2 B: Set up forum for training providers and supply chain to be updated and feedback on future activity

6.4.3.1. **Context/ Assumptions**:

- By bringing together training providers and supply chain we can improve outcomes

- A forum can be an effective way to exchange information and build collaborations
- Collaboration and sharing knowledge deliver better outcomes for all

6.4.3.2. **Approach**: Retrofit Supply Chain role uses information from Co-design phase and further research by the Research & Data role to develop forum, acts as secretariat for forum, develops draft terms and conditions, approved by Interim Steering Group and forum membership. Terms of Reference should ensure forum membership is regularly reviewed to ensure inclusivity.

6.4.3.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Supply Chain and Research & Data roles
- Stakeholder(s): Supply chain, training providers

6.4.3.4. **Links**:

- Pre-action(s): 1.2A

6.4.3.5. **Strategic fit**:

- Strengths: 5, 8, 9
- Weaknesses: 4, 7, 9,
- Opportunities: 5, 9, 12
- Direct beneficiaries: Supply chain, training providers

6.4.4. Action 1.2 C: Create Research & Data role or allocate to existing

6.4.4.1. **Context/ Assumptions**:

- Resource is needed to research best practice and system information and collate and process data
- Interventions can be made which can increase the flow of system intelligence
- Knowledge and data can improve outcomes

6.4.4.2. **Approach**: Backbone organisation to develop job description, agree with Interim Steering Group, consult with stakeholders, and agree whether role will be recruited to or allocated to existing.

6.4.4.3. **Resources**:

- Money: c. £40k per year
- Role(s): Backbone organisation
- Stakeholder(s): All

6.4.4.4. **Links**:

- Pre-action(s): None

6.4.4.5. **Strategic fit**:

- Strengths: 4, 15

- Weaknesses: 11, 12
- Opportunities: 4, 10, 13
- Threats: 4

6.4.5. Action 1.2 D: Gather information/data on demand and supply to help to ensure balance

6.4.5.1. **Context/ Assumptions**:

- Stakeholders across the system have data which when gathered can be used to determine levels of demand and supply
- Demand data can be used to infer optimum levels of supply required
- Working to balance supply and demand can improve outcomes

6.4.5.2. **Approach**: Research & Data role to conduct stakeholder assessment to determine potential sources of data, engage with sources to understand what's possible, develop plan for review and approval by Interim Steering Group and implement.

6.4.5.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data role
- Stakeholder(s): Community energy organisations, health, local authority, social landlords, supply chain, training providers

6.4.5.4. **Links**:

- Pre-action(s): 1.2C

6.4.5.5. **Strategic fit**:

- Strengths: 5, 15
- Weaknesses: 11
- Direct beneficiaries: Supply chain

6.4.6. Action 1.2 E: Conduct stakeholder assessment of employer representative bodies

6.4.6.1. **Context/ Assumptions**:

- Organisations such as chambers of commerce, Federation of Small Businesses, Business Leaders Forum can be useful in disseminating information to support delivery of supply chain outcomes
- Intermediary organisations can be engaged with

6.4.6.2. **Approach**: Research & Data role research intermediary organisations, Retrofit Supply Chain role engages with organisations and develops and implements collaboration plans.

6.4.6.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Supply Chain and Research & Data roles
- Stakeholder(s): Supply chain

6.4.6.4. **Links**:

- Pre-action(s): 1.2A

6.4.6.5. **Strategic fit**:

- Strengths: 5
- Weaknesses: 4
- Direct beneficiaries: Supply chain

6.4.7. Action 1.2 F: Develop and deliver plan to promote local opportunities via local employer representative bodies

6.4.7.1. **Context/ Assumptions**:

- Organisations such as chambers of commerce, Federation of Small Businesses, Business Leaders Forum can be useful in disseminating information to support delivery of supply chain outcomes

6.4.7.2. **Approach**: Retrofit Supply Chain role disseminates information on retrofit supply chain opportunities via employer representative bodies.

6.4.7.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Supply Chain role
- Stakeholder(s): Supply chain

6.4.7.4. **Links**:

- Pre-action(s): 1.2E

6.4.7.5. **Strategic fit**:

- Weaknesses: 4
- Opportunities: 5, 9
- Direct beneficiaries: Supply chain

6.5. Sub-goal 1.3: Improve coordination of demand generation activities

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

- Strengths: 1, 2, 3, 4, 6, 8, 9, 13
- Weaknesses: 1, 2, 3, 9, 11, 12
- Opportunities: 1, 6, 10, 13, 15, 18, 19
- Threats: 1, 2, 4, 8, 9

6.5.2. Action 1.3 A: Set up forum for stakeholders involved in market development/ engagement activities

6.5.2.1. **Context/ Assumptions**:

- A range of organisations are engaging households to develop interest in taking up retrofit measures or broader home improvement measures which could be utilised
- By bringing together those involved in market development activities we can improve outcomes
- A forum can be an effective way to exchange information and build collaborations
- Collaboration and sharing knowledge deliver better outcomes for all

6.5.2.2. **Approach**: Retrofit Market Development and Research & Data role to conduct stakeholder assessment of local system to determine who is involved in activities, engage and consult on forum format and terms of reference, prepare draft plan and terms of reference and agree with Interim Steering Group and stakeholders, then implement. Terms of Reference should ensure forum membership is regularly reviewed to ensure inclusivity.

6.5.2.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Market Development and Research & Data role
- Stakeholder(s): Community energy organisations, community organisations, health, local authorities, social landlords

6.5.2.4. **Links**:

- Pre-action(s): 1.2C, 2.1A

6.5.2.5. **Strategic fit**:

- Strengths: 1, 2, 3, 8, 9, 13
- Weaknesses: 2
- Opportunities: 1, 6, 19
- Direct beneficiaries: Community energy organisations, community organisations, health, local authorities, social landlords

6.5.3. Action 1.3 B: Develop agreement on ways of working to ensure clear communication with householders

6.5.3.1. **Context/ Assumptions**:

- A lack of clarity and consistency across system communications to households is reducing efficiencies and hindering achievement of better outcomes
- Stakeholders involved in communications can agree a way of working together
- Agreeing on ways of working together can improve outcomes

6.5.3.2. **Approach**: Research & Data role to research national best practice, Retrofit Market Development to then consult with stakeholders to develop options paper, agree with

Interim Steering Group preferred options, agree with stakeholders and set up and start pilot.

6.5.3.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Market Development and Research & Data roles
- Stakeholder(s): Community energy organisations, community organisations, health, local authorities, social landlords

6.5.3.4. **Links**:

- Pre-action(s): 1.3A

6.5.3.5. **Strategic fit**:

- Strengths: 3, 8, 13
- Weaknesses: 1, 2, 3, 9, 11, 12
- Opportunities: 1, 10, 19
- Threats: 1
- Direct beneficiaries: Homeowners, community energy organisations, community organisations, health, local authorities, social landlords

6.5.4. Action 1.3 C: Convene stakeholders involved in Surrey Adapt (Resilience), Local Area Energy Plan, Surrey Skills Plan and other linked strategic areas to ensure alignment

6.5.4.1. **Context/ Assumptions**:

- Several strategic areas, such as the Surrey Adapt strategy, the Local Area Energy Plan, Heat Network Zoning, the Surrey Skills Plan, Fuel Poverty Strategy, and the Health and Wellbeing Strategy, have overlap with the Retrofit Strategic Action Plan; by ensuring alignment, we can harness opportunities for collaboration and greater efficiencies in delivery across joint priorities.

6.5.4.2. **Approach**: Retrofit Market Development role to engage with initiatives and determine potential areas for collaboration, consult with relevant stakeholders, agree plan and implement.

6.5.4.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Market Development role
- Stakeholder(s): Local authorities, DNOs, training providers, health

6.5.4.4. **Links**:

- Pre-action(s): 1.3A

6.5.4.5. **Strategic fit**:

- Strengths: 8, 17
- Weaknesses: 1, 3
- Opportunities: 4, 14

- Threats: 7
- Direct beneficiaries: Local authorities, DNOs, training providers, health

6.5.5. Action 1.3 D: Conduct stakeholder assessment of those within health sector that could benefit from retrofit activity

6.5.5.1. **Context/ Assumptions**:

- There is activity within the health sector that overlaps with the Retrofit Strategic Action Plan and has shared desired outcomes

6.5.5.2. **Approach**: Research & Data and Retrofit Market Development roles to conduct stakeholder assessment of health system and produce report for Interim Steering Group.

6.5.5.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Market Development and Research & Data roles
- Stakeholder(s): Health, local authorities

6.5.5.4. **Links**:

- Pre-action(s): 1.2C, 2.1A

6.5.5.5. **Strategic fit**:

- Strengths: 8
- Opportunities: 19
- Direct beneficiaries: Local authorities, public health

6.5.6. Action 1.3 E: Convene and coordinate with Public Health, Social Care and Integrated Care Services to strengthen the enabling environment for retrofit and create a shared language, work and understanding

6.5.6.1. **Context/ Assumptions**:

- There is activity within the health sector that overlaps with the Retrofit Strategic Action Plan and has shared desired outcomes
- Collaboration can deliver better outcomes for all

6.5.6.2. **Approach**: Research & Data role to research best practice, Retrofit Market Development role to work with stakeholders to determine areas for coordination and collaboration, develop plan and agree with Interim Steering Group and relevant stakeholders and implement.

6.5.6.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Market Development and Research & Data roles
- Stakeholder(s): Health, local authorities

6.5.6.4. **Links**:

- Pre-action(s): 1.3D

6.5.6.5. **Strategic fit**:

- Strengths: 8
- Weaknesses: 2, 3
- Threats: 8, 9
- Direct beneficiaries: Homeowners, tenants, local authorities, public health

6.5.7. Action 1.3 F: Conduct analysis on key funding gaps and opportunities, non-financial barriers (e.g. grid capacity, data) and policy and communicate findings to stakeholders

6.5.7.1. **Context/ Assumptions**:

- By understanding the range of barriers to increasing rates of retrofit, actions can be developed to minimise their effect on the system
- By determining the opportunities that, for example, Heat Network Zoning & the Local Area Energy Plan will unlock stakeholders can ensure appropriate coordination of retrofit investment and action across Surrey.

6.5.7.2. **Approach**: Research & Data role to consult with stakeholders and build picture of funding gaps, opportunities and barriers, work with Retrofit Market Development to prepare report and disseminate to stakeholders.

6.5.7.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Market Development and Research & Data roles
- Stakeholder(s): All

6.5.7.4. **Links**:

- Pre-action(s): 1.2C, 1.3A, 2.1A

6.5.7.5. **Strategic fit**:

- Strengths: 3, 13, 15, 17
- Weaknesses: 2, 5, 6, 11, 12
- Opportunities: 4, 10, 13, 14, 15, 18
- Threats: 2, 4
- Direct beneficiaries: Local authorities, social landlords

6.6. Sub-goal 2.1: Improve awareness, understanding and confidence in all households

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

- Strengths: 1, 2, 3, 4, 6, 7, 8, 9, 10, 11, 13
- Weaknesses: 1, 2, 5, 6, 9, 13
- Opportunities: 2, 3, 4, 7, 8, 9, 10, 15, 17

- Threats: 1, 3, 5, 6, 11

6.6.2. Action 2.1 A: Create Retrofit Market Development role or allocate to existing

6.6.2.1. **Context/ Assumptions**:

- Resource is needed to help develop and deliver actions to increase demand for retrofit measures
- Interventions can be made which help to support growth in demand

6.6.2.2. **Approach**: Backbone organisation to develop job description, agree with Interim Steering Group, consult with stakeholders, and agree whether role will be recruited to or allocated to existing.

6.6.2.3. **Resources**:

- Money: c. £40k per year
- Role(s): Backbone organisation
- Stakeholder(s): All

6.6.2.4. **Links**:

- Pre-action(s): None

6.6.2.5. **Strategic fit**:

- Weaknesses: 3
- Direct beneficiaries: Community organisations, local authorities, social landlords

6.6.3. Action 2.1 B: Develop agreement between organisations engaging homeowners to coordinate activity and consistent messaging

6.6.3.1. **Context/ Assumptions**:

- A range of organisations are engaging households to develop interest in taking up retrofit measures or broader home improvement measures which could be utilised
- By coordinating activity, better outcomes can be achieved

6.6.3.2. **Approach**: Retrofit Market Development role to consult with relevant stakeholders and understand activity, determine areas of potential improvement/coordination, agree plan with stakeholders and Interim Steering Group and implement.

6.6.3.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Market Development role
- Stakeholder(s): Community energy organisations, community organisations, health, local authorities, social landlords

6.6.3.4. **Links**:

- Pre-action(s): 2.1A

6.6.3.5. **Strategic fit**:

- Strengths: 3, 8, 13, 18
- Weaknesses: 2, 3, 13
- Opportunities: 2, 3, 4, 6, 7, 10
- Threats: 1
- Direct beneficiaries: Homeowners, tenants, community organisations, health, local authorities

6.6.4. Action 2.1 C: Create single brand for retrofit support and advice in Surrey

6.6.4.1. **Context/ Assumptions**:

- A single brand can improve communication effectiveness with householders
- Assumes a single brand can be agreed by system stakeholders
- Should include a review of the local/national quality assurance and remediation regime, and promote positive case studies and good practice to mitigate risks of poor retrofit.

6.6.4.2. **Approach**: Research & Data role to determine best practice, Retrofit Market Development role to then prepare business case and engage stakeholders to secure agreement on way forward, develop plan and agree with Interim Steering Group, deliver plan.

6.6.4.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Market Development role
- Stakeholder(s): Community energy organisations, community organisations, health, local authorities, private landlords, social landlords

6.6.4.4. **Links**:

- Pre-action(s): 2.1B

6.6.4.5. **Strategic fit**:

- Strengths: 3, 8, 13, 18
- Weaknesses: 13
- Opportunities: 6, 10, 17
- Threats: 1, 3
- Direct beneficiaries: Homeowners, tenants, local authorities, community organisations, health, private landlords, social landlords

6.6.5. Action 2.1 D: Create General Retrofit Support Service to provide advice and triage via website, email and phone

6.6.5.1. **Context/ Assumptions**:

- Providing a central advice service can help to increase engagement with retrofit by homeowners and households and deliver action

- A support service can be delivered

6.6.5.2. **Approach**: Research & Data role to determine best practice report, Retrofit Market Development role to prepare options paper and agree with Interim Steering Group, then consult with stakeholders, agree preferred plan and implement.

6.6.5.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Market Development role
- Stakeholder(s): Community energy organisations, community organisations, health, local authorities, private landlords, social landlords

6.6.5.4. **Links**:

- Pre-action(s): 2.1C

6.6.5.5. **Strategic fit**:

- Strengths: 3, 8, 13, 18
- Threats: 1
- Direct beneficiaries: Homeowners, tenants, local authorities, community organisations, health, private landlords, social landlords

6.6.6. Action 2.1 E: Prepare plan for enforcement of Minimum Energy Efficiency Standards (e.g. outreach activities, landlord register)

6.6.6.1. **Context/ Assumptions**:

- The Minimum Energy Efficiency Standards (MEES) in the private rented sector are expected to be tightened to a minimum energy rating of C (rather than E in its existing form) in the short to medium term
- This regulation can act as a stimulator of retrofit activity within the private rental market but requires enforcement
- Initiatives can be delivered to leverage the regulatory change and deliver better outcomes

6.6.6.2. **Approach**: Retrofit Market Development role to conduct stakeholder assessment of local authorities and private rental sector to determine points of contact, research activity under previous MEES round, Research & Data role to determine best practice nationally, Retrofit Market Development role to prepare options paper and consult with stakeholders, agree way forward and confirm with Interim Steering Group.

6.6.6.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Market Development role
- Stakeholder(s): Local authorities (Trading Standards and/or Environmental Health), private landlords, social landlords

6.6.6.4. **Links**:

- Pre-action(s): 2.1A

6.6.6.5. **Strategic fit**:

- Strengths: 8, 11, 13
- Weaknesses: 3, 5, 6, 11, 14
- Opportunities: 2
- Direct beneficiaries: Tenants, local authorities, community organisations, health, private landlords

6.6.7. Action 2.1 F: Map and develop network of trusted community intermediaries, e.g. climate action groups, faith groups

6.6.7.1. **Context/ Assumptions**:

- Community organisations have levels of trust with residents that can be mobilised for the promotion of and engagement with retrofit measures
- Many people lack trust and confidence in retrofit measures and schemes to deliver measures
- Community organisations can be mapped and understood

6.6.7.2. **Approach**: Research & Data role to conduct stakeholder assessment exercise supported by Retrofit Market Development role and produce report for the Interim Steering Group and then wider dissemination.

6.6.7.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Market Development role
- Stakeholder(s): Community energy organisations, community organisations, health, local authorities

6.6.7.4. **Links**:

- Pre-action(s): 2.1A

6.6.7.5. **Strategic fit**:

- Strengths: 3
- Weaknesses: 13
- Opportunities: 2, 7
- Threats: 1
- Direct beneficiaries: Homeowners, tenants, local authorities, community organisations, health

6.6.8. Action 2.1 G: Create forum of community organisations to support retrofit activities

6.6.8.1. **Context/ Assumptions**:

- Community organisations have levels of trust with residents that can be mobilised for the promotion of and engagement with retrofit measures

- Many people lack trust and confidence in retrofit measures and schemes to deliver measures
- There is overlap between the objectives of community organisations and the Retrofit Strategic Action Plan which can be mobilised for joint activity

6.6.8.2. **Approach**: Retrofit Market Development role uses information from action 2.1F to develop forum, acts as secretariat for forum, develops draft terms and conditions, approved by Interim Steering Group and forum membership

6.6.8.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Market Development role
- Stakeholder(s): Community energy organisations, community organisations

6.6.8.4. **Links**:

- Pre-action(s): 2.1F

6.6.8.5. **Strategic fit**:

- Strengths: 3
- Weaknesses: 9, 13
- Opportunities: 2, 7
- Threats: 1, 5, 6, 10, 12
- Direct beneficiaries: Local authorities, community organisations, health

6.6.9. Action 2.1 H: Create Community Engagement/ Resident Liaison Officer role or allocate to existing

6.6.9.1. **Context/ Assumptions**:

- Engaging with households directly and with community organisations can improve outcomes
- Resource is needed to maximise the opportunities of direct and community-level engagement

6.6.9.2. **Approach**: Backbone organisation to develop job description, agree with Interim Steering Group, consult with stakeholders, and agree whether role will be recruited to or allocated to existing.

6.6.9.3. **Resources**:

- Money: c. £40k
- Role(s): Backbone organisation
- Stakeholder(s): All

6.6.9.4. **Links**:

- Pre-action(s): 2.1G

6.6.9.5. **Strategic fit**:

- Strengths: 3

- Weaknesses: 3, 9, 13
- Opportunities: 2, 7, 11
- Threats: 1
- Direct beneficiaries: Homeowners, tenants, local authorities, community organisations, health, social landlords

6.6.10. Action 2.1 I: Develop and deliver retrofit engagement events with community organisations

6.6.10.1. **Context/ Assumptions**:

- Community organisations have levels of trust with residents that can be mobilised for the promotion of and engagement with retrofit measures
- Many people lack trust and confidence in retrofit measures and schemes to deliver measures
- By delivering events with trusted partners within communities we can develop interest and engagement with retrofit

6.6.10.2. **Approach**: Community Engagement role works with Research & Data, Retrofit Market Development roles and community organisations to develop plan based on best practice, plan agreed with Interim Steering Group and implemented.

6.6.10.3. **Resources**:

- Money: To be determined
- Role(s): Community Engagement, Research & Data, Retrofit Market Development roles
- Stakeholder(s): Community energy organisations, community organisations

6.6.10.4. **Links**:

- Pre-action(s): 2.1F

6.6.10.5. **Strategic fit**:

- Strengths: 1, 2, 3, 6, 7, 11
- Weaknesses: 3, 9, 13
- Opportunities: 2, 5, 7, 11
- Threats: 1, 12
- Direct beneficiaries: Homeowners, tenants, private landlords, local authorities, community organisations, health

6.6.11. Action 2.1 J: Develop a neighbourhood-scale and/or grassroots retrofit initiative, engaging and empowering communities to develop suitable retrofit schemes

6.6.11.1. **Context/ Assumptions**:

- Emerging research on benefits of taking a ‘place-based’ approach to delivering retrofit schemes

- Place-based not yet a clearly defined term but incorporates taking a hyper-local, systems approach and meeting communities where they are with a strong focus on empowering households
- Assumes a place-based approach can deliver better outcomes
- Surrey's pilot Neighbourhood Area Committees (NACs) could provide a test bed for such an initiative and/or form a key part of the Plan's delivery framework, particularly around progress tracking and engagement efforts.

6.6.11.2. **Approach**: Research & Data role to determine best practice, Retrofit Market Development role to consult with stakeholders on pilot approach, agree proposal with Interim Steering Group and then stakeholders prior to implementation.

6.6.11.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data, Retrofit Market Development and Community Engagement roles
- Stakeholder(s): Community (energy) organisations, health, local authorities, private landlords, social landlords, supply chain, training providers

6.6.11.4. **Links**:

- Pre-action(s): 2.1G, 2.1H, 2.1I

6.6.11.5. **Strategic fit**:

- Strengths: 3, 8, 9, 12, 13, 18
- Weaknesses: 2, 13
- Opportunities: 2, 5, 11
- Threats: 12
- Direct beneficiaries: Homeowners, tenants, community (energy) organisations, health, local authorities, private landlords, social landlords, supply chain

6.7. Sub-goal 2.1.1: Build confidence in households facing lower barriers

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

- Strengths: 1, 2, 3, 4, 6, 7, 10, 11
- Weaknesses: 5, 6
- Opportunities: 2, 7, 10, 15
- Threats: 1, 5, 6, 11

6.7.2. Action 2.1.1 A: Create Retrofit Facilitation Provider/ Specialist Support Service for self-funded sector

6.7.2.1. **Context/ Assumptions**:

- There exists a market within Surrey for specialist technical assistance for homeowners, providing impartial, expert assessment, procurement, design project management, and/or evaluation services, independent of installers.
- This market can help develop the business to consumer, micro to SME element of the supply chain which is critical to widespread take up of measures.
- Surrey's pilot of such a service in 2024/2025 can be optimised and scaled.

6.7.2.2. **Approach**: Research & Data role to research best practice and current service provision, Retrofit Market Development role to prepare options paper and consult with stakeholders, then proposal put forward to Interim Steering Group for approval and implementation.

6.7.2.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Market Development roles
- Stakeholder(s): Community (energy) organisations, local authorities, supply chain

6.7.2.4. **Links**:

- Pre-action(s): 2.1A

6.7.2.5. **Strategic fit**:

- Strengths: 3, 9, 10, 11, 14
- Weaknesses: 2, 3, 5, 6, 9, 13, 14
- Opportunities: 5, 15
- Threats: 3, 5, 10, 12
- Direct beneficiaries: Homeowners, community (energy) organisations, local authorities, private landlords, supply chain

6.7.3. Action 2.1.1 B: Determine touchpoints for self-funded sector and develop plan to leverage for retrofit action

6.7.3.1. **Context/ Assumptions**:

- There are touchpoints, such as buying a house, installing a kitchen, receiving council tax reminders, which could be utilised as trigger points to deliver engagement/action
- Key stakeholders involved at such touchpoints can be mobilised to promote simultaneous retrofit planning

6.7.3.2. **Approach**: Research & Data role to research best practice and determine touch points in local system, Retrofit Market Development to develop mobilisation plan with stakeholders and agree plan with Interim Steering Group, then implement.

6.7.3.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Market Development roles
- Stakeholder(s): Community organisations, health, local authorities, private landlords, social landlords, supply chain

6.7.3.4. **Links**:

- Pre-action(s): 2.1A

6.7.3.5. **Strategic fit**:

- Strengths: 7, 9
- Weaknesses: 8, 14
- Opportunities: 5, 10
- Threats: 5, 6, 10, 11, 12
- Direct beneficiaries: Homeowners, community (energy) organisations, health, local authorities, private landlords, supply chain

6.7.4. Action 2.1.1 C: Implement new and/or develop existing collective buying scheme to reduce cost of installation

6.7.4.1. **Context/ Assumptions**:

- By aggregating demand for retrofit measures cost savings in delivery can be found
- Service providers, such as Solar Together, are available to deliver
- Quality assurance can be delivered through collective buying schemes

6.7.4.2. **Approach**: Retrofit Market Development role to determine service providers and develop options paper for consultation with stakeholders, then agree final plan with Interim Steering Group and implement.

6.7.4.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Market Development role
- Stakeholder(s): Community (energy) organisations, local authorities, private landlords, social landlords, supply chain

6.7.4.4. **Links**:

- Pre-action(s): 2.1A

6.7.4.5. **Strategic fit**:

- Strengths: 1, 2
- Threats:12
- Direct beneficiaries: Homeowners, community (energy) organisations, local authorities, private landlords, social landlords, supply chain

6.8. Sub-goal 2.1.2: Build confidence in households facing higher barriers

6.8.1.1. Strategic fit (across all goal actions):

- Strengths: 3, 4, 6, 7, 11

- Weaknesses: 5, 6, 13
- Opportunities: 2, 7, 8, 9, 10, 15
- Threats: 1, 6, 11

6.8.2. Action 2.1.2 A: Map local authority officers already engaging households and develop plan to increase retrofit awareness

6.8.2.1. **Context/ Assumptions**:

- Several local authority services have an overlap with retrofit such as environmental health, building control and planning
- Engagement with these services could lead to opportunities to engage service users in retrofit and deliver better outcomes
- Officers will be interested in engaging when benefits can be determined

6.8.2.2. **Approach**: Research & Data role to determine services, Retrofit Market Development officer to determine benefits for each service, then consult with services to develop mobilisation plan, agree with Interim Steering Group and implement.

6.8.2.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Market Development roles
- Stakeholder(s): Local authorities

6.8.2.4. **Links**:

- Pre-action(s): 2.1A

6.8.2.5. **Strategic fit**:

- Strengths: 8, 9, 11, 13
- Weaknesses: 1, 2, 3, 9
- Opportunities: 2, 4, 8, 9, 17
- Threats: 8, 9
- Direct beneficiaries: Homeowners, tenants, public health, local authorities, private landlords

6.8.3. Action 2.1.2 B: Develop plan for councils and community groups to work together to reach low-income households

6.8.3.1. **Context/ Assumptions**:

- Both councils and community groups are engaging with low-income households
- By working together better outcomes can be achieved
- Low-income households can take up retrofit measures, in combination with grants schemes

6.8.3.2. **Approach**: Community Engagement Role to engage with relevant council departments and community groups to develop joint initiatives and ways of working, develop and agree plan with Interim Steering Group and implement.

6.8.3.3. **Resources**:

- Money: To be determined
- Role(s): Community Engagement
- Stakeholder(s): Community energy organisations, community organisations, local authorities

6.8.3.4. **Links**:

- Pre-action(s): 2.1G, 2.1H, 2.1I

6.8.3.5. **Strategic fit**:

- Strengths: 3, 13
- Weaknesses: 1, 2, 3, 13
- Opportunities: 7
- Threats:1, 8, 9
- Direct beneficiaries: Homeowners, tenants, private landlords, social landlords, local authorities, community (energy) organisations, health

6.8.4. Action 2.1.2 C: Simplify householder journey for fuel poor sector grant schemes, e.g. via a centralised service

6.8.4.1. **Context/ Assumptions**:

- A 'managing agent' function contracts with and manages suppliers of services (assessment, procurement, design, project management, evaluation) or may have in-house team, taking on responsibility for delivery of overall specification
- Risks related to managing agent models can be effectively managed
- Alternative delivery/business models may prove more cost-effective or have a better risk profile
- Surrey's LAs (as the Surrey Consortium) currently host a managing agent function in-house within SCC for some schemes (e.g. WHLG) and contract external agents for others (e.g. ECO4 Flex).

6.8.4.2. **Approach**: Research & Data role to review best practice, Retrofit Market Development and Retrofit Supply Chain Development roles to develop options paper and consult with stakeholders and Interim Steering Group to recommend any changes to existing model.

6.8.4.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data, Retrofit Supply Chain Development and Retrofit Market Development roles
- Stakeholder(s): Community energy organisations, local authorities, social landlords, supply chain

6.8.4.4. **Links**:

- Pre-action(s): 2.1A

6.8.4.5. **Strategic fit**:

- Strengths: 8, 9 ,12, 13, 18
- Weaknesses: 1, 2, 3
- Opportunities: 2, 3, 4, 6, 8, 9, 14, 16
- Threats: 8, 9
- Direct beneficiaries: Homeowners, tenants, private landlords, social landlords, local authorities, community (energy) organisations, health, supply chain

6.9. Sub-goal 3.1: Enable households who are facing lower barriers to access finance to undertake retrofit

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

- Strengths: 3, 4, 7, 10, 11
- Weaknesses: 8
- Opportunities: 5, 15
- Threats: 12

6.9.2. Action 3.1 A: Create Retrofit Finance role or allocate to existing

6.9.2.1. **Context/ Assumptions**:

- Resource is needed to help develop and deliver actions to increase the availability of finance for retrofit measures
- Interventions can be made which help to support growth in financial measures
- The provision of finance will increase take up of retrofit measures

6.9.2.2. **Approach**: Backbone organisation to develop job description, agree with Interim Steering Group, consult with stakeholders, and agree whether role will be recruited to or allocated to existing.

6.9.2.3. **Resources**:

- Money: To be determined
- Role(s): Backbone organisation
- Stakeholder(s): All

6.9.2.4. **Links**:

- Pre-action(s): None

6.9.2.5. **Strategic fit**:

- Weaknesses: 8

- Opportunities: 5
- Threats: 12
- Direct beneficiaries: Private landlords, social landlords, local authorities, community (energy) organisations, supply chain

6.9.3. Action 3.1 B: Develop attractive finance offers under trusted brand

6.9.3.1. **Context/ Assumptions**:

- Attractive financial offers such as a revolving low interest loan scheme or energy as a service can be developed and deliver beneficial outcomes
- Interventions can be made which help to support growth in financial measures
- The provision of finance will increase take up of retrofit measures

6.9.3.2. **Approach**: Research & Data role to determine best practice, Retrofit Finance role to expand to incorporate current service provision, develop business case for review by the Interim Steering Group before wider consultation and agreement on delivery plan.

6.9.3.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Finance roles
- Stakeholder(s): Community energy organisations, finance providers, local authorities, social landlords

6.9.3.4. **Links**:

- Pre-action(s): 1.2C, 3.1A, 2.1C, 3.2E

6.9.3.5. **Strategic fit**:

- Weaknesses: 8
- Opportunities: 5
- Threats: 12
- Direct beneficiaries: Homeowners, private landlords, social landlords, local authorities, community (energy) organisations

6.9.4. Action 3.1 C: Deliver retrofit finance advice via General Support Service

6.9.4.1. **Context/ Assumptions**:

- The provision of finance will increase take up of retrofit measures
- Finance advice can be a regulated matter and therefore requires careful consideration

6.9.4.2. **Approach**: Retrofit Finance role to determine levels of finance advice which can be provided and will increase take up of retrofit measures, consult with stakeholders on options and then agree implementation plan with Interim Steering Group.

6.9.4.3. **Resources**:

- Money: To be determined

- Role(s): Retrofit Finance role
- Stakeholder(s): Finance experts, local authorities

6.9.4.4. **Links**:

- Pre-action(s): 2.1D, 3.1A

6.9.4.5. **Strategic fit**:

- Weaknesses: 8
- Opportunities: 5
- Threats: 12
- Direct beneficiaries: Homeowners, private landlords, local authorities, community (energy) organisations

6.10. Sub-goal 3.2: Improve access to funded schemes for households facing higher barriers

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

- Strengths: 3, 6, 11, 12, 16
- Weaknesses: 4, 9, 13, 14
- Opportunities: 7, 8, 19
- Threats: 1, 10, 11, 12

6.10.2. Action 3.2 A: Conduct stakeholder assessment of local authorities involved in ECO LA Flex and understand each local authority strategy

6.10.2.1. **Context/ Assumptions**:

- Energy Company Obligation Local Authority Flex (ECO LA Flex) scheme is often under utilised
- ECO LA Flex can support delivery of retrofit measures

6.10.2.2. **Approach**: Research & Data role and Grant Scheme Support & Coordination to conduct stakeholder assessment and determine current provision and report to Interim Steering Group on findings.

6.10.2.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Grant Scheme Support & Coordination roles
- Stakeholder(s): Supply chain, local authorities

6.10.2.4. **Links**:

- Pre-action(s): 1.1A, 1.1B, 1.2C

6.10.2.5. **Strategic fit**:

- Strengths: 12, 13, 18
- Weaknesses: 1, 2, 3, 10
- Opportunities: 8
- Direct beneficiaries: Local authorities, supply chain

6.10.3. Action 3.2 B: Agree minimum level of service for delivery of ECO LA Flex and support local authorities in meeting minimum

6.10.3.1. **Context/ Assumptions**:

- Energy Company Obligation Local Authority Flex (ECO LA Flex) scheme is often under utilised
- ECO LA Flex can support delivery of retrofit measures
- Best practice is available for replication
- Local authorities can be supported in improving strategies

6.10.3.2. **Approach**: Research & Data role to determine best practice, Grant Scheme Support & Coordination to develop options for improving services in consultation with stakeholders, review and agree improvement plan with Interim Steering Group.

6.10.3.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Grant Scheme Support & Coordination roles
- Stakeholder(s): Supply chain, local authorities

6.10.3.4. **Links**:

- Pre-action(s): 1.1A, 1.2C, 3.2A

6.10.3.5. **Strategic fit**:

- Strengths: 12, 13, 18
- Weaknesses: 1, 2, 3, 10
- Opportunities: 8, 17
- Direct beneficiaries: Homeowners, tenants, private landlords, local authorities, supply chain

6.10.4. Action 3.2 C: Engage Energy Company Obligation providers as a consortium to simplify customer journey

6.10.4.1. **Context/ Assumptions**:

- Energy Company Obligation (ECO) grant scheme is often underutilised, and this could be rectified by greater levels of coordination and collaboration
- Lead generation is often an area of difficulty for ECO providers with local stakeholders often better suited to this activity

- There are often 'rogue traders' operating under the ECO term, confusing homeowners and creating distrust
- ECO providers will benefit from coordinated local activity

6.10.4.2. **Approach**: Grant Scheme Support & Coordination role to consult with local authorities and social landlords on current provision and develop improvement plan with ECO providers for approval by Interim Steering Group and then implementation.

6.10.4.3. **Resources**:

- Money: To be determined
- Role(s): Grant Scheme Support & Coordination role
- Stakeholder(s): Energy providers, local authorities, social landlords, supply chain

6.10.4.4. **Links**:

- Pre-action(s): 1.1A

6.10.4.5. **Strategic fit**:

- Strengths: 12, 13, 18
- Weaknesses: 1, 2, 3, 9, 10
- Opportunities: 8
- Threats: 10, 12
- Direct beneficiaries: Homeowners, tenants, private landlords, social landlords, local authorities, supply chain, energy companies

6.10.5. Action 3.2 D: Engage with grant commissioning organisations to determine plan to maximise benefits from Warm Homes Local/Social Housing grant schemes

6.10.5.1. **Context/ Assumptions**:

- Government's Warm Homes grant schemes offer opportunity for improving outcomes through coordination and collaboration
- Coordination and collaboration can offer benefits for all stakeholders involved and be delivered under terms of funding agreements
- Best practice available to be replicated/learnt from
- There is still time to develop plans within current funding agreement periods and project stage

6.10.5.2. **Approach**: Grant Scheme Support & Coordination role to determine who has secured funding and gather information on plans, develop options for collaborative and coordinative working, consult with stakeholders on options and agree plan with Interim Steering Group.

6.10.5.3. **Resources**:

- Money: To be determined
- Role(s): Grant Scheme Support & Coordination role
- Stakeholder(s): Local authorities, social landlords

6.10.5.4. **Links**:

- Pre-action(s): 1.1A, 1.1B

6.10.5.5. **Strategic fit**:

- Strengths: 8, 12, 13, 18
- Weaknesses: 1, 2, 3
- Opportunities: 6, 8
- Direct beneficiaries: Homeowners, tenants, private landlords, social landlords, local authorities, supply chain

6.10.6. Action 3.2 E: Engage with social/private landlords to determine financial barriers in delivery of retrofit and develop rectification plan

6.10.6.1. **Context/ Assumptions**:

- Lack of finance could be holding back social and private landlords from investing in retrofit measures
- Suitable financial offers could be developed and utilised by landlords

6.10.6.2. **Approach**: Research & Data role to determine best practice, Retrofit Market Development role and Retrofit Finance role to consult with private and social landlords on financial barriers, develop rectification plan with stakeholders, secure Interim Steering Group approval and implement.

6.10.6.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data role and Retrofit Market Development role and Retrofit Finance Role
- Stakeholder(s): Finance providers, private landlords, social landlords

6.10.6.4. **Links**:

- Pre-action(s): 1.2C, 2.1A, 2.1E, 3.1A, 3.2D

6.10.6.5. **Strategic fit**:

- Strengths: 13, 18
- Direct beneficiaries: Tenants, private landlords, social landlords, local authorities

6.10.7. Action 3.2 F: Develop and deliver a social prescribing scheme with GPs and health partners

6.10.7.1. **Context/ Assumptions**:

- Retrofit can deliver health benefits and therefore can support health practitioners in improving the lives of patients
- By using health service touch points, engagement with - and use of - retrofit measures can be increased

6.10.7.2. **Approach**: Research & Data role to determine best practice, Retrofit Market Development role to consult with stakeholders on potential for utilising health service touch points,

develop options paper and agree way forward with stakeholders and then Interim Steering Group.

6.10.7.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Market Development roles
- Stakeholder(s): Health, local authorities

6.10.7.4. **Links**:

- Pre-action(s): 1.2C, 1.3E, 2.1A

6.10.7.5. **Strategic fit**:

- Strengths: 12
- Weaknesses:13
- Opportunities: 2, 4, 5, 7, 8, 15, 17, 19
- Threats: 12
- Direct beneficiaries: Homeowners, tenants, social landlords, local authorities, community (energy) organisation, health partners

6.11. Sub-goal 4.1: Support and grow our local supply chain and skills base through sector collaboration

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

- Strengths: 1, 2, 5, 9, 10, 11, 13, 14, 18
- Weaknesses: 2, 4, 7
- Opportunities: 5, 6, 8, 9, 12, 15, 17
- Threats: 2, 5, 10

6.11.2. Action 4.1 A: Create a forum(s) for training providers and supply chain to share learning and best practice, explore skills needs and inform training provision

6.11.2.1. **Context/ Assumptions**:

- Communication between training providers and the supply chain could be improved
- By facilitating the exchange of information and learning, better outcomes can be delivered for all
- Strengthening existing forums such as the Surrey GSAP can ensure employers' current and future skills needs are heard and inform training provision

6.11.2.2. **Approach**: Retrofit Supply Chain Development role to engage with training providers and supply chain, determine needs and develop model to realise improvement jointly, produce business case for Interim Steering Group approval and implement.

6.11.2.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Supply Chain Development role
- Stakeholder(s): Supply chain, training providers

6.11.2.4. **Links**:

- Pre-action(s): 1.2A

6.11.2.5. **Strategic fit**:

- Strengths: 5, 9, 11
- Weaknesses: 4, 7
- Opportunities: 12
- Direct beneficiaries: Supply chain, training providers

6.11.3. Action 4.1 B: Develop plan to promote retrofit careers and support both new entrants and those re-skilling, with a focus on diversifying the workforce

6.11.3.1. **Context/ Assumptions**:

- Low take-up of retrofit training courses, combined with insufficient understanding of the barriers preventing participation, an ageing workforce, and a lack of diversity in the workforce in terms of gender, ethnicity, and disability will create capacity issues as retrofit demand increases, and will hinder engagement with retrofit from Surrey's diverse communities.
- Work is needed to start engaging younger people. Engaging careers services and coordinating retrofit careers promotional activity could help.
- Employability programmes, i.e. structured initiatives designed to help individuals improve their job readiness and secure employment, could help to engage underrepresented groups, including providing support via advice, information, and bursaries

6.11.3.2. **Approach**: Research & Data role to explore best practice for improving take-up of retrofit courses and diversity of supply chain, including a review of employability programmes and a review of Gemserv's retrofit skills roadmap analysis conducted for Surrey County Council. Retrofit Supply Chain Development role to conduct stakeholder assessment of local career's advice services, map out existing processes, determine improvements, consult with stakeholders on potential improvements and a delivery plan, then present to Interim Steering Group for approval and implement.

6.11.3.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Supply Chain Development roles
- Stakeholder(s): Local authorities, supply chain, training providers

6.11.3.4. **Links**:

- Pre-action(s): 1.2A, 1.2C, 4.1A

6.11.3.5. **Strategic fit**:

- Strengths: 5, 9, 11

- Weaknesses: 4, 7
- Opportunities: 5, 17
- Threats: 10
- Direct beneficiaries: Jobseekers, students, training providers, supply chain, local authorities

6.11.4. Action 4.1 C: Create Retrofit Installer 'community of practice' (SME focus) for peer-to-peer learning, upskilling, mentoring and general support

6.11.4.1. **Context/ Assumptions**:

- To develop capacity and quality within the installer sector, there needs to be provision of support and upskilling
- Although currently only a small amount of demand for such a service, this can be nurtured and grown as demand increases and enables quicker development of a more sustainable sector
- Assumes best practice is available for replication

6.11.4.2. **Approach**: Retrofit Supply Chain Development role to engage with installers interested in retrofit and consult on support needed, develop plan, present to Interim Steering Group and implement.

6.11.4.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Supply Chain Development role
- Stakeholder(s): Local authorities, supply chain, training providers

6.11.4.4. **Links**:

- Pre-action(s): 1.2A, 4.1A

6.11.4.5. **Strategic fit**:

- Strengths: 5, 9, 11
- Weaknesses: 4, 7
- Opportunities: 15
- Direct beneficiaries: Supply chain, local authorities, training providers, business support organisations

6.11.5. Action 4.1 D: Provide on-site training through local authority/social landlord commissioned works, as part of funded retrofit programmes via social value

6.11.5.1. **Context/ Assumptions**:

- Local authorities and social landlords will be commissioning retrofit works as part of grant-funded programmes, and these provide important learning opportunities

- Utilisation of these learning opportunities can be done without having a detrimental effect on delivery
- On-site learning opportunities can provide important skill development and sector engagement benefits

6.11.5.2. **Approach**: Research & Data role to determine best practice nationally, Retrofit Supply Chain Development role to engage with local authorities, social landlords and training providers and consult on potential activities, agree plan and then review and approve with Interim Steering Group prior to implementation.

6.11.5.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Supply Chain Development role
- Stakeholder(s): Local authorities, social landlords, training providers

6.11.5.4. **Links**:

- Pre-action(s): 1.2A, 1.2C, 4.1.1E

6.11.5.5. **Strategic fit**:

- Strengths: 9, 18
- Weaknesses: 7, 10
- Opportunities: 1, 9, 15
- Direct beneficiaries: Jobseekers, students, training providers, supply chain, local authorities, social landlords

6.11.6. Action 4.1 E: Develop an investment vehicle to channel private investment into local training

6.11.6.1. **Context/ Assumptions**:

- Training sector lacks adequate funding
- Manufacturers could be a source of investment whilst benefiting from promotion, sales and sector development

6.11.6.2. **Approach**: Retrofit Supply Chain Development role to engage with manufacturers to determine potential, then consult with training providers and develop pilot projects for approval by the Interim Steering Group and then implementation.

6.11.6.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Supply Chain Development role
- Stakeholder(s): Training providers, supply chain

6.11.6.4. **Links**:

- Pre-action(s): 1.2A

6.11.6.5. **Strategic fit**:

- Strengths: 9
- Weaknesses: 4, 7

- Direct beneficiaries: Students, training providers, supply chain

6.12. Sub-goal 4.1.1: Support & grow local supply chain

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

- Strengths: 1, 2, 9, 10, 11, 13, 18
- Opportunities: 5, 6, 8, 9
- Threats: 10

6.12.2. Action 4.1.1 A: Develop a coordinated Surrey procurement approach that benefits local supply chain, particularly SMEs

6.12.2.1. **Context/ Assumptions**:

- Public procurement approaches are not maximising use of the local supply chain and small/medium-sized enterprises (SMEs)
- Meanwhile, local authorities and social landlords may need to procure the same services at similar times which can create sub-optimal outcomes through lack of supply chain capacity to respond to tenders and/or deliver contracts
- Assumes greater use of the local supply chain would provide better outcomes and approaches can be developed which enable an increase in use whilst complying with public sector procurement regulations
- Assumes joint procurements or coordination of procurements between commissioners could deliver better outcomes for all

6.12.2.2. **Approach**: Research & Data role to determine national and regional best practice, Retrofit Supply Chain Development role to conduct stakeholder engagement with procurement departments, develop forum of officers, consult with local supply chain to determine barriers, co-develop improvement plan with stakeholders, review and approve with Interim Steering Group and implement.

6.12.2.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Supply Chain Development roles
- Stakeholder(s): Local authorities, social landlords, supply chain

6.12.2.4. **Links**:

- Pre-action(s): 1.2A, 1.2C

6.12.2.5. **Strategic fit**:

- Strengths: 9, 13, 18
- Weaknesses: 2, 10
- Opportunities: 1, 5, 6, 9, 17
- Threats: 2, 8, 9
- Direct beneficiaries: Supply chain, local authorities, social landlords

6.12.3. Action 4.1.1 B: Develop and deliver SME-friendly social impact standard and processes with the aim of increasing SME involvement in contract delivery

6.12.3.1. **Context/ Assumptions**:

- Social impact/value can deliver increases in SME usage but effectiveness and enforcement is patchy across procurement and contract periods
- Social impact/value aspects of public procurement can be used to deliver better outcomes for commissioners, local SMEs and the system as whole
- Best practice can be replicated

6.12.3.2. **Approach**: Research & Data role to determine national best practice and regional strategies around social impact, Retrofit Supply Chain Development role to conduct stakeholder assessment of procurement departments, develop forum of officers, consult with local supply chain to determine barriers, co-develop improvement plan with stakeholders, review and approve with Interim Steering Group and implement.

6.12.3.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Supply Chain Development roles
- Stakeholder(s): Local authorities, social landlords, supply chain

6.12.3.4. **Links**:

- Pre-action(s): 1.2A, 1.2C

6.12.3.5. **Strategic fit**:

- Strengths: 9, 13, 18
- Weaknesses: 2
- Opportunities: 1, 5, 6, 9, 17
- Threats: 2, 9
- Direct beneficiaries: Supply chain, local authorities, social landlords

6.12.4. Action 4.1.1 C: Boost regular and consistent comms with supply chain including ‘meet the buyer’ events

6.12.4.1. **Context/ Assumptions**:

- Often the local supply chain isn’t aware of opportunities
- Assumes engagement and awareness-raising activities can be carried out in line with public sector procurement regulations

6.12.4.2. **Approach**: The Retrofit Supply Chain Development role holder will work with procurement officers to establish processes for identifying upcoming procurements. They will then lead activities to disseminate information, consult with supply chain, develop a coordinated plan, present to and seek approval from the Interim Steering Group and implement the actions.

6.12.4.3. **Resources**:

- Money: c. £4,000 - £8,000 per annum
- Role(s): Retrofit Supply Chain Development roles
- Stakeholder(s): Local authorities, social landlords, supply chain

6.12.4.4. **Links**:

- Pre-action(s): 1.2 A, 1.2E, 1.2F, 3.2A, 3.2D, 4.1.1A, 4.1.1B

6.12.4.5. **Strategic fit**:

- Strengths: 9
- Opportunities: 5, 17
- Direct beneficiaries: Training providers, supply chain, local authorities, social landlords, business support organisations

6.12.5. Action 4.1.1 D: Collate advice and guidance on accessing start up finance for market entrants or for SMEs to expand, via Economic Development teams

6.12.5.1. **Context/ Assumptions**:

- Possible to stimulate development of new retrofit businesses or expansion of existing through provision of finance
- Existing retrofit market could support new entrants and demand activities should increase the potential

6.12.5.2. **Approach**: Research & Data role to determine best practice, Retrofit Supply Chain Development and Retrofit Finance roles to engage with local authority Economic Development departments to co-develop options, consult with supply chain, present plan Interim Steering Group for approval and implement

6.12.5.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data, Retrofit Supply Chain Development and Retrofit Finance roles
- Stakeholder(s): Local authorities, supply chain

6.12.5.4. **Links**:

- Pre-action(s): 1.2A, 1.2C, 3.1A

6.12.5.5. **Strategic fit**:

- Strengths: 9
- Opportunities: 5, 9
- Direct beneficiaries: Supply chain, local authorities, business support orgs

6.12.6. Action 4.1.1 E: Develop options for a trusted installers network in the self-funded market

6.12.6.1. **Context/ Assumptions**:

- One of the barriers to getting retrofit done is a perceived lack of trust with installers by buyers
- Levels of knowledge within the installer network vary and quality can be an issue
- A service could be developed which can give homeowners reassurance over a particular installer
- Risks can be managed effectively for the network holder, homeowner and installer
- Some installers do cross over from fuel poor grants market but others may require mentoring if desire is to support SMEs to grow and to join up whole supply chain

6.12.6.2. **Approach**: Research & Data role to determine best practice, Retrofit Supply Chain Development role to consult with stakeholders on findings and develop options paper for Interim Steering Group.

6.12.6.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Supply Chain Development role
- Stakeholder(s): Community energy organisations, local authorities, social landlords, supply chain

6.12.6.4. **Links**:

- Pre-action(s): 1.2A, 1.2C

6.12.6.5. **Strategic fit**:

- Strengths: 9
- Opportunities: 5
- Direct beneficiaries: Homeowners, private landlords, supply chain, local authorities, community (energy) organisations

6.13. Sub-goal 4.1.2: Support and improve local skills base

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

- Strengths: 5, 14
- Weaknesses: 4, 7
- Opportunities: 12
- Threats: 2

6.13.2. Action 4.1.2 A: Develop plan with industry to support colleges by creating 'end of career' pathway to 'give back' via trainer roles.

6.13.2.1. **Context/ Assumptions**:

- Training providers struggle to recruit tutors to deliver retrofit courses and keep up to speed with industry practices
- Due to the physical nature of retrofit work, some tradespeople can no longer do – or prefer to move away from – installation work but could transition to work as tutors in training providers and share valuable learnings

6.13.2.2. **Approach**: Retrofit Supply Chain Development role to consult with training providers on current processes, determine improvement actions, consult with supply chain, develop plan, present to Interim Steering Group for approval and implement.

6.13.2.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Supply Chain Development role
- Stakeholder(s): Supply chain, training providers

6.13.2.4. **Links**:

- Pre-action(s): 1.2A

6.13.2.5. **Strategic fit**:

- Strengths: 5
- Weaknesses: 7
- Opportunities: 5
- Threats: 5
- Direct beneficiaries: Training providers, supply chain

6.13.3. Action 4.1.2 B: Conduct review of local retrofit training provision including early stage retrofit content/modules in general construction courses.

6.13.3.1. **Context/ Assumptions**:

- Possible that construction and plumbing courses could be improved through greater incorporation of retrofit and building physics knowledge to achieve better outcomes.

6.13.3.2. **Approach**: Research & Data role to determine best practice, including review of Gemserv's study for Surrey County Council, Retrofit Supply Chain Development role to consult with training providers and supply chain and co-develop improvement plan, present to Interim Steering Group for approval and implement

6.13.3.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Supply Chain Development roles
- Stakeholder(s): Supply chain, training providers

6.13.3.4. **Links**:

- Pre-action(s): 1.2A, 1.2C, 4.1E

6.13.3.5. **Strategic fit**:

- Strengths: 5, 14
- Weaknesses: 4, 7
- Opportunities: 12
- Direct beneficiaries: Students, training providers, supply chain, local authorities

6.13.4. Action 4.1.2 C: Conduct review and then develop business case for funding/ investment in facilities, equipment, and staff recruitment, training and retention for delivery of courses.

6.13.4.1. **Context/ Assumptions**:

- To deliver sufficient capacity and quality in the supply chain, greater investment is needed in training provision
- Funding and investment options can be found to deliver better training provision

6.13.4.2. **Approach**: Retrofit Supply Chain Development role to build on improvement plan produced by action 4.1.2D to co-develop business case for investment with stakeholders, secure approval from Interim Steering Group and work to secure investment.

6.13.4.3. **Resources**:

- Money: To be determined
- Role(s): Retrofit Supply Chain Development roles
- Stakeholder(s): Supply chain, training providers

6.13.4.4. **Links**:

- Pre-action(s): 1.2A, 4.1.2C, 4.1.2D

6.13.4.5. **Strategic fit**:

- Strengths: 5, 14
- Weaknesses: 4, 7
- Opportunities: 12
- Direct beneficiaries: Students, training providers, supply chain

6.13.5. Action 4.1.2 D: Develop and deliver activities to support take up of apprenticeships (e.g. promo campaigns, shared-apprenticeship pilots, grants for SMEs etc)

6.13.5.1. **Context/ Assumptions**:

- Future demand is expected to increase and therefore work needs to be done to start engaging new entrants in retrofit jobs, so they are ready to work when demand increases
- Apprenticeships are a good way to engage new entrants in retrofit careers and can provide good learning outcomes
- Training providers and employers are available to work with apprentices
- Supply chain can find apprenticeships difficult, particularly for smaller organisations, and therefore need support to ensure take up

6.13.5.2. **Approach**: Research & Data role to determine best practice, Retrofit Supply Chain Development role to consult with training providers and supply chain on barriers to use of apprentices, develop improvement plan, present to Interim Steering Group for approval and implement.

6.13.5.3. **Resources**:

- Money: To be determined
- Role(s): Research & Data and Retrofit Supply Chain Development roles
- Stakeholder(s): Supply chain, training providers

6.13.5.4. **Links**:

- Pre-action(s): 1.2A, 1.2C, 4.1A, 4.1.1D

6.13.5.5. **Strategic fit**:

- Strengths: 5, 14
- Weaknesses: 4, 7
- Opportunities: 5, 12
- Direct beneficiaries: Jobseekers, students, training providers, supply chain