

Appendix 3 Summary of the SHDF Bid Application

Summary of Funding & Co-funding.

Total Project Costs breakdown.

Cost Breakdown	Inc. non-recoverable VAT	Exc. VAT
Project Costs - Capital	1,409,947.06	1,330,782.79
Project Costs – Admin/Ancillary	239,805.07	226,340.74
Total Project Costs	1,649,725.13	1,557,123.53

Capital and Administration/Ancillary Cost Breakdown

Table 8a - Project Cost Breakdown - Capital Costs		
Cost area	Inc. non-recoverable VAT	Exc. VAT
	£ -	£ -
Site Management incl design, testing	£ 212,777.05	£ 200,830.26
Direct Installation costs	£ 1,197,170.01	£ 1,129,952.53
Total	£ 1,409,947.06	£ 1,330,782.79

Table 8b - Project Cost Breakdown – Admin & Ancillary		
Cost area	Inc. non-recoverable VAT	Exc. VAT
Head Office Costs	£ 101,956.65	£ 96,232.09
Project Management (excl. Site Management)	£ 44,957.90	£ 42,433.65
Client/Resident Liaison	£ 10,568.38	£ 9,975.00
Pre-Install Assessment & Retrofit Assessor/Coordinator	£ 71,753.76	£ 67,725.00
Regulatory/Statutory Fees	£ 10,568.38	£ 9,975.00
Total	£ 239,805.07	£ 226,340.74

Summary of Capital and Admin/Ancillary Costs for BEIS and the Council

	Total Capital Costs	BEIS Capital Costs	SDDC Capital Costs	BEIS Admin/ Ancillary	SDDC Admin/ Ancillary

Inc non-recoverable VAT	1,649,725.13	939,964.71	469,982.35	159,870.05	79,935.02
Exc. VAT	1,557,123.53	887,188.53	443,594.26	150,893.83	75,446.91

Summary of BEIS/SHDF Grant and Council Co-funding.

	Inc non-recoverable VAT	Exc. VAT
BEIS funding	1,099,834.7	1,038,082.3
SDDC co-funding	549,917.37	519,041.17

BEIS has confirmed a SHDF grant award to the Council of up to £1,099,835 is subject to agreeing the Memorandum of Understanding (MOU).

The Council's co-funding was reported and agreed at the South Derbyshire District Council Housing and Community Services Committee on 30/9/21 and Finance and Management Committee on 7/10/2021.

Targeted Properties in the SHDF Bid.

Table 1 - Targeted Properties		Number of Properties
Starting EPC	C+	10
	D	88
	E	12
	F	1
	G	0
	Unknown	0
	Total	111
Starting Space Heating Demand Score (modelled data is acceptable) Data to be provided in kwh/m2/yr.	300+	0
	250 - 299	2
	200 - 249	8
	150 - 199	34
	100 - 149	67
	50 - 99	0
	0 - 49	0
	Total	111

The aim for the property selection process for this funding is to identify a list of 111 properties that meet the following criteria:

- The worst properties (lowest EPC rating)
- Those that will benefit from a 'fabric first' approach
- Properties with the lowest regrets in terms of future measures required
- A priority on 'fuel poor' and most vulnerable households and property types

As well as the above, the property selection process includes two further drivers based on minimising the disruption of vulnerable customers and ensuring value-for-money through the following:

1. Choosing measures that minimises the 'decanting' of vulnerable households
2. The geographical 'clustering' of properties/property types to make the installation of measures efficient and cost-effective

We utilised our base data to identify suitable properties for inclusion in this SHDF Wave 1 Programme:

- 101 properties; EPC ratings of D and below (91.5%)
- 13 'worst properties'; EPC ratings of E and F (10%)
- 15 properties that require fabric first plus Solar PV to gain EPC rating C or above

Property Type	Terraced	3
	Semi-detached	7
	Detached	0
	Bungalow	101
	Low rise flat (1-2 Storey)	0
	Medium rise flat (3-5 Storey)	0
	High rise flat (6+ Storey)	0
	Other	0
	Unknown	0
	Total	111

This data illustrated that a large proportion of the housing stock with EPC ratings of D and below consisted of Sheltered Bungalows. This property type caters for older customers who are the most vulnerable groups. These have been given priority in this funding application to improve fuel poor households. 101 properties are Sheltered Bungalows (91%) with EPC ratings of:

- 11 - E rating
- 80 - D rating
- 9 - C rating

Acting on fuel poverty.

Fuel Type	Main's gas	94
	Liquid Petroleum Gas (LPG)	0
	Oil	0
	Electricity	17
	Solid Fuel	0
	Biomass	0
	Other	0
	Unknown	0
	Total	111

As illustrated, all the properties selected are either heated by Mains Gas or Electric. The fabric first measures selected will reduce consumption of gas/electric for household heating significantly. This will reduce fuel consumption, fuel bills as well as increasing the warmth of these households.

Retrofit Measures Selected.

The Council has already completed retrofit assessments across all archetypes for the worst affected properties. This will ensure that the proposed retrofit measures will not change upon the receipt of funding as the measures have already been identified by the pro-active approach to commission an earlier assessment of the Council's housing stock for retrofit opportunities. The Council has also completed some background modelling assessments based on the archetype modelling from the Coordinator's Retrofit Reports and is confident that the proposed costs are fully deliverable.

The cost estimates for the retrofit measures have been generated by a range of cost sources and considerations:

- Initial costs have focused on non-intrusive measures to establish elemental quantities of the individual proposed method of enhancements and costed out property by property in quantified form using known/current market rates benchmarked against historical costs from delivered project
- Energy Specifics, an energy consultancy has carried out a sample property intrusive surveys, SAP assessments to verify advisory costs from the NCC data.

Planned outcomes from the Retrofit measures.

The main aim of this Project is to improve the EPC rating of the 111 properties selected which should increase their energy efficiency, reduce the household fuel bills and the energy consumed which should lead to significant carbon reductions, as shown below.

Table 3 - Planned Outputs		
Expected EPC Band of homes post installation	A	0
	B	0
	C	111
	D	0
	Total	111
Homes meeting expected 90 kwh/m ² /yr. target	% Of homes in application expected to meet or exceed target	100
	% Of homes in application not expected to meet target	0
Bill Reduction	Average saving in £/yr. from all homes	£358.52
Energy Savings	Total expected energy savings in kilowatt hours (kWh) from project	312607
Jobs Supported	Number of total jobs supported via project	42
	Of this total, how many are apprentices	2