



## **COMMUNITIES SCRUTINY COMMITTEE**

### **Tuesday 25th June 2024**

You are invited to attend the next meeting of **Communities Scrutiny Committee**, which will be held at:

**Council Chamber - Civic Offices**  
on **Tuesday 25th June 2024 at 7.00 pm**

**Georgina Blakemore**  
**Chief Executive**

**Democratic Services Officer:** Laura Kirman  
lkirman@eppingforestdc.gov.uk

**Members:** Councillors J Lucas (Chairman), J Lea (Vice-Chairman),  
R Brookes, M Dadd, M Markham, L Morgan, S Murray,  
C Nweke, R Pugsley, R Sharif, S Yerrell and W Marshall

### **SUBSTITUTE NOMINATION DEADLINE: 6.00PM**

**This meeting will be broadcast live and recorded for repeated viewing.**

---

#### **1. WEBCASTING INTRODUCTION**

The Chairman will read the following announcement:

“I would like to remind everyone that this meeting will be filmed live or recorded, and uploaded to the internet and will be capable of repeated viewing.

Therefore, by participating in this meeting, you are consenting to being filmed and to the possible use of those images and sound recordings.

If any public speakers on MS Teams do not wish to have their image captured, they should ensure that their video setting throughout the meeting is turned off and set to audio only.

Members and public speakers are reminded to turn on their microphones before speaking and turn them off when they have finished.”

**2. APOLOGIES FOR ABSENCE**

To be announced at the meeting.

To report non-attendance before the meeting, please use the [Members Portal webpage](#) to ensure your query is properly logged.

Alternatively, you can access the Members portal from the front page of the [Council's website](#), at the bottom under 'Contact Us'.

**3. SUBSTITUTE MEMBERS**

To report the appointment of any substitute members for the meeting.

**4. DECLARATIONS OF INTEREST**

To declare interests in any item on this agenda.

**5. NOTES OF PREVIOUS MEETING (Pages 3 - 6)**

To agree the notes of the meeting of the Select Committee held on 19 March 2024.

**6. WORK PROGRAMME & TERMS OF REFERENCE (Pages 7 - 8)**

To consider, comment and propose any amendments to the Terms of Reference of the Work Programme, for consideration and approval by The Overview and Scrutiny Committee.

**7. HOUSING ENERGY EFFICIENCY RETRO-FIT (Pages 9 - 43)**

To consider and comment on the approach to Housing Energy Efficiency Retro-fit.

**8. HOUSING AND PROPERTY SERVICES YEAR END PERFORMANCE & TENANT SATISFACTION MEASURES OUTCOME (Pages 44 - 51)**

To consider and comment on the report on Housing and Property Service Performance and on the report on Tenant Satisfaction Measures.

**9. QUALIS PROPERTY SOLUTIONS PERFORMANCE AND PROGRESS (Pages 52 - 60)**

To consider and comment on the presentation from Qualis Property Solutions.

**10. DATES OF FUTURE MEETINGS**

To note that the next meeting of the Communities Scrutiny Committee will be held at 7.00pm on 24 Septemebr 2024.

## EPPING FOREST DISTRICT COUNCIL COMMUNITIES SCRUTINY COMMITTEE MEETING MINUTES

Tuesday 19 March 2024, 7.00 pm - 8.40 pm

### Council Chamber - Civic Offices

**Members Present:** Councillors A Patel (Chairman), M Markham, C McCann, S Murray, R Brookes, R Sharif, S Yerrell, W Marshall, I Allgood and T Matthews

**Members Present (Virtually):** Councillors J Jogia

**Other Councillors:** Councillors R Balcombe and K Williamson

**Apologies:** Councillor(s) J Lucas and Caroline Pond

**Officers In Attendance:** Laura Kirman (Democratic Services Officer), Steven Mitchell (PR Website Editor), Mandy Thompson (Service Director - Regulatory Services), Caroline Wiggins (Directorate Specialist – Technical Services) and Melissa Faux (Senior Crime and ASB Officer)

**Officers In Attendance (Virtually):** Jennifer Gould (Strategic Director and Chief Operating Officer) and Matt Picking (Democracy & Elections Apprentice)

---

### [A RECORDING OF THIS MEETING IS AVAILABLE FOR REPEATED VIEWING](#)

#### 39 WEBCASTING INTRODUCTION

The Chairman reminded everyone present that this meeting would be recorded and that the Council had adopted a protocol for the webcasting of its meetings.

#### 40 SUBSTITUTE MEMBERS

The Committee noted that:

- Councillor Allgood had been appointed as substitute for Councillor Pond and
- Councillor Matthews had been appointed as substitute for Councillor Lucas.

#### 41 DECLARATIONS OF INTEREST

There were no declarations of interest made at the meeting.

#### 42 NOTES OF PREVIOUS MEETING

##### RESOLVED:

That the notes of the Communities Scrutiny Committee held on 5 March 2024 be taken as read and were agreed as a correct record.

**43 WORK PROGRAMME**

The Communities Scrutiny Committee noted the progress made on the work programme and suggested that work programme for the next municipal year should contain an even distribution of items across the Service Areas within the remit of this Committee.

**44 BRIEFING ON SERIOUS VIOLENCE DUTY**

James Pearson, Team Manager for Essex Violence and Vulnerability Unit, advised the Committee that a preventative approach based on the public health model was being taken to reduce violence across Essex. The key objectives were to aimed at reduce knife injury, non-domestic homicide and admissions to hospitals due to the use of bladed weapons, in the under 25 age group.

There had been a 40% reduction for knife injuries which had fallen from 34 to 27, and homicides had reduced from 15 to 9. There were clear targets to reduce violence incidents within Essex.

There were five key stands to delivering the strategy; engagement with the community, workforce development, targeted intervention, the use of data and intelligence, and a communication strategy.

The Committee suggested that work with parents was crucial and were advised that work with the family to look at early intervention had been funded.

The unit worked with people from the point of arrest and worked closely with the police. Contact was made within 24 hours of arrest and this had resulted in 72% engagement, and the outcomes were linked to the decrease propensity and desire to reoffend.

The Chairman thanked Mr Pearson for the briefing and his responses to the Committee.

**45 PRESENTATION FROM THE DISTRICT COMMANDER FOR EPPING FOREST AND BRENTWOOD**

The Acting District Commander for Epping Forest and Brentwood, Chief Inspector Jonathan Main, gave a presentation to the Committee on the following items.

- Policing structure in the district
- The Force Plan 2022/25, which aimed to help people, keep people safe and catch criminals.
- Delivering Community Priorities, with outcomes of specific operations, campaigns and events, in relation to tackling crime, tackling violence against women and girls, vehicle crime, burglary, ASB, domestic abuse, young people, and volume crime with a community impact.
- Partnership working
- Debden Broadway was highlighted as area that had received specific funding to address ASB, which had reduced by 30%
- Community engagement
- Performance of the 12 months to January 2024, and
- Public Perception survey results.

The Committee thanked the Acting District Commander for the presentation and the work carried out by the police across the district.

The Committee were provided with the following responses in relation to the queries raised.

- There was a dedicated rural crime officer and a rural engagement team, which had recently expanded.
- A funding bid had been made to continue the work in the Debden area and allow the patrols to continue. There was a wider partnership approach looking at the built environment. It was acknowledged that there needed to be a long term strategy
- An explanation of criminal behaviour orders
- There was a dedicated Town Centre Officer, businesses should be encouraged to report crimes.
- Councillors could contact the police through neighbourhood policing contacts, the community policing team had a phoneline, and areas team details could be provided. Crimes should be reported in the usual way.
- There were dedicated officers for officers for the Epping Forest District
- Details of the approach to 'cocooning' when crime prevention advice and investigative leads and reassurance were provided to an area post burglary.
- There were 4 x 4 vehicles, the use needed to be balanced between urban and rural areas.
- Police were not involved on parking issues, including pavement parking, unless there was an obstruction, in persistent basis or dangerous cases these could be reported.
- Rural vehicle crime and speeding through villages were an issue, with limited response when reported. Officers would attend Parish Council meetings.

The Chairman thanked Acting Chief Inspector Main for his presentation and answering the queries raised by the Committee.

#### **46 BI-ANNUAL REPORT ON THE WORK OF THE COUNCIL-FUNDED POLICE OFFICERS**

The Specialist Technical Services Officer, C Wiggins addressed the Committee on the six-month report on the work and range of operations of the Council's Funded Police team, and highlighted the added value of co-location of the Police and Council Officers

The Committee recognised the value of the partnership approach, and acknowledged that this was a highlight report, and the work carried out had a positive impact on the community.

The Committee suggested that there should be increased awareness and publicity of the work carried out by the team.

The 'Herbert Protocol' was a system to help protect vulnerable individuals with dementia. The police would use social media to raise awareness, and this would be put in the Member's Bulletin.

The Chairman acknowledged the value of the partnership approach and thanked everyone involved for their commitment.

#### **47 EPPING FOREST COMMUNITY SAFETY PARTNERSHIP ANNUAL STRATEGIC ASSESSMENT, ANNUAL REPORT, SAFER STREETS NINEFIELDS END OF PROJECT REPORT AND CSP PLAN ON A PAGE**

The Specialist Technical Services Officer, C Wiggins provided an overarching view of the work carried out by the Community Partnership and provided detail on specific operations carried out across the district. The Epping Forest Community Safety Partnership Annual Strategic Assessment, Annual Report, Safer Streets Ninefields End of Project Report, Partnership Plan on a Page and Glossary was considered by the Committee.

The Community Safety Partnership was required to complete an annual Strategic Assessment which was used to direct and guide their activities, under the requirements as responsible authorities, of the Crime and Disorder Act 1998.

The Committee queried if the Strategic Assessment should be a restricted document and were advised that this had been received from the police as a classified document.

The Committee commented and commended the work of the Community Partnership and requested that projects and outcomes should be more widely publicised.

**RESOLVED:**

The Committee noted the Epping Forest Community Safety Partnership Annual Strategic Assessment, Annual Report, Safer Streets Ninefields End of Project Report, Partnership Plan on a Page and Glossary.

*Post Meeting update:*

*Confirmation was received that Essex Police had marked and classified the Strategic Assessment document as 'Official Sensitive',*

**48 DATES OF FUTURE MEETINGS**

**RESOLVED:**

The committee noted this was the Committee's last meeting of the 2023/24 municipal year.

**CHAIRMAN**

## COMMUNITIES SCRUTINY COMMITTEE

### TERMS OF REFERENCE 2024/25

#### Core Areas of Responsibility

The Communities Scrutiny Committee core areas of responsibility align directly with the [Corporate Plan 2023-2027](#) and the key objectives for Stronger Communities, which are:

- To safeguard vulnerable people and support residents in need, providing support and equality of opportunity in a district that is safe for everyone.
- To work with our partners to achieve wellbeing and health equity for all our residents.
- To listen to our communities and work with them when making decisions, developing policies, and designing services.

The Communities Scrutiny Committee will be responsible for the scrutiny of the Housing & Strategic Health Partnerships, Community Health & Wellbeing, and Customer & Corporate Support Services Portfolios, as detailed below.

#### Key Areas covered by the Communities Scrutiny Committee

Housing, Community, Customer Services, Health and Wellbeing and Community Partnerships.

#### Key Objectives

1. To develop an annual work programme that effectively scrutinises the areas of responsibility outlined above.
2. To provide scrutiny of services and areas of concern that are identified by Overview and Scrutiny Committee in its review of Corporate Key Performance Indicators.
3. To engage in policy review and development, with a focus on improvement and how this can be best achieved.
4. To consider any matter referred by the Overview and Scrutiny Committee, Cabinet or Portfolio Holder and to make recommendations as appropriate.
5. To establish working groups and task and finish panels to undertake any activity within the terms of reference.
6. To undertake pre-scrutiny through the review of specific proposals of the Council and its partner organisations or other local service providers to help develop policy.
7. To engage with the community and encourage community engagement.
8. To monitor and review relevant projects and associated closure and benefits reports.
9. To consider the impact on customers, residents, businesses and visitors to our District, and to respond to consultation activities.

**Communities Scrutiny Committee Work Programme 2024/25****Chairman: Cllr J Lucas**

C1	Annual Housing Performance Report	25 Jun 2024	Forward Plan 25 June -	Surjit Balu
C2	Tenant Satisfaction Measures report	25 Jun 2024	Forward Plan 25 June -	Surjit Balu
C3	Retro-fit Plan	25 Jun 2024	Forward Plan 25 June - pre Cab (8 July)	Surjit Balu
C4	Qualis Property Solutions Performance and Progress	25 Jun 2024	Presentation by Qualis	
C5	Repairs Policy	24 Sept 2024		Surjit Balu
C6	Regulatory landscape for housing and property	24 Sept 2024		Surjit Balu
C7	Housing development pipeline	24 Sept 2024		Surjit Balu
C8	Driving better health outcomes through the integrated care system – EFDC's role	14 Jan 2025	Partnership arrangements the delivery of integrated care.	
Single Item Meeting	Dedicated Police and Community Safety	4 March 2025		Mandy Thompson/ Caroline Wiggins



## Report to Communities Scrutiny Committee

**Date of meeting: 25 June 2024**

**Portfolio:**

Housing and HGGT (Cllr Nigel Bedford)

**Subject:** Approach to the Energy Efficiency Retrofit of EFDC's Housing Properties

**Officer contact for further information:**

John Taphouse, Interim Head of Asset Management (jtaphouse@eppingforestdc.gov.uk)

**Democratic Services Officer:**

L Kirman: email: [DemocraticServices@eppingforestdc.gov.uk](mailto:DemocraticServices@eppingforestdc.gov.uk) tel:01992 564243)

---



**Recommendations/Decisions Required:**

To consider, comment and recommend for approval the draft Cabinet paper and supporting documents proposing EFDC's approach to the programme of energy efficiency retrofit to the Council's housing properties.

**Report:**

Cabinet will be provided with the Cabinet report, a document titled 'Proposed Approach to EFDC's Housing Energy Efficiency Retrofit Programme' and the associated equality impact assessment. Drafts of these papers are attached to this report. The Communities Scrutiny Committee are asked to consider, comment and recommend for approval the draft papers ahead of presentation to Cabinet.

**Reason for decision:**

To recommend any amendments to the draft Cabinet papers prior to presentation to Cabinet.

**Options considered and rejected:**

EFDC have no option but to meet the government targets for 2030 and 2050. The considerations in arriving at the proposed approach to meeting these targets are discussed in the attached report.

**Consultation undertaken:**

The following consultation was undertaken during the development of the proposed approach to the energy efficiency retrofit programme:

- Tenants' and Leaseholders' Panel
- Leadership team
- Housing Management team

**Resource implications:**

The total cost of Phase 1 is estimated at £16.5m. Based on the grant contribution for our current retrofit project, we expect the net cost to EFDC to be approximately £10.0m including professional and other fees. This cost can be accommodated within the HRA business plan.

We will require a client project manager for the energy efficiency retrofit programme. The gross salary cost would be approximately £60,000. Part of this cost may be grant funded.

**Legal and Governance Implications, Relevant Statutory Powers:**

The government target is for all social housing to achieve SAP band C by 2030. Phase 1 will deliver this target for EFDC.

The government has legislated that the UK is to reach net zero carbon emissions by 2050. Phase 2 will make EFDC homes affordable to heat using decarbonised energy.

**Corporate Plan Implications:**

The housing asset management strategy will support the following key objective of the Corporate Plan:

- Stronger place – The energy efficiency retrofit programme will improve the affordability of social housing.
- Stronger communities – The retrofit programme will create opportunities for training and jobs.

**Background Papers:**

- The draft Cabinet report
- Paper on the Proposed Approach to EFDC’s Housing Energy Efficiency Retrofit Programme
- Equality Impact Assessment

**Risk Management:**

The key risks to the energy efficiency retrofit programme include:

Risk	Action to Mitigate
<b>Actual costs exceed estimates</b>	Receive regular updates from Parity Projects’ cost schedule and re-run scenarios with revised costs. Select cost effective retrofit measures. Contract structure and work programming to maximise cost effectiveness. Competitive tendering of contracts.
<b>Grant funding not at assumed rate</b>	Recruit project manager with a track record of grant bidding and working effectively with funders.
<b>Delays due to procurement</b>	Start procurement process as soon as possible after approach agreed.

	Generate interest in the programme to attract suitable Installers to bid.
<b>Refusals from tenants resulting in non-completion of the programme</b>	Select Installers with a track record of effective resident liaison. Work closely with tenants and develop work plans that account for individual needs and concerns.

**Equality:**

The Equality Impact Assessment is attached. There are no medium or high adverse impacts on any equality group.

**Key Decision:** (if required):

To consider and comment on the draft Cabinet paper and supporting documents proposing EFDC's approach to the programme of energy efficiency retrofit to the Council's housing properties.

# Equality Impact Assessment

1. Under s.149 of the Equality Act 2010, when making decisions, Epping District Council must have regard to the Public Sector Equality Duty, ie have due regard to:
  - eliminating unlawful discrimination, harassment and victimisation, and other conduct prohibited by the Act,
  - advancing equality of opportunity between people who share a protected characteristic and those who do not,
  - fostering good relations between people who share a protected characteristic and those who do not, including tackling prejudice and promoting understanding.
2. The characteristics protected by the Equality Act are:
  - age
  - disability
  - gender
  - gender reassignment
  - marriage/civil partnership
  - pregnancy/maternity
  - race
  - religion/belief
  - sexual orientation.
3. In addition to the above protected characteristics you should consider the cross-cutting elements of the proposed policy, namely the social, economic and environmental impact (including rurality) as part of this assessment. These cross-cutting elements are not a characteristic protected by law but are regarded as good practice to include.
4. The Equality Impact Assessment (EqIA) document should be used as a tool to test and analyse the nature and impact of either what we do or are planning to do in the future. It can be used flexibly for reviewing existing arrangements but in particular should enable identification where further consultation, engagement and data is required.
5. Use the questions in this document to record your findings. This should include the nature and extent of the impact on those likely to be affected by the proposed policy or change.
6. Where this EqIA relates to a continuing project, it must be reviewed and updated at each stage of the decision.
7. All **Cabinet, Council, and Portfolio Holder reports must be accompanied by an EqIA**. An EqIA should also be completed/reviewed at key stages of projects.
8. To assist you in completing this report, please ensure you read the guidance notes in the Equality Analysis Toolkit and refer to the following Factsheets:
  - Factsheet 1: Equality Profile of the Epping Forest District
  - Factsheet 2: Sources of information about equality protected characteristics
  - Factsheet 3: Glossary of equality related terms
  - Factsheet 4: Common misunderstandings about the Equality Duty
  - Factsheet 5: Frequently asked questions
  - Factsheet 6: Reporting equality analysis to a committee or other decision making body

## Section 1: Identifying details

Your function, service area and team: Housing Asset Management

If you are submitting this EqlA on behalf of another function, service area or team, specify the originating function, service area or team:

Title of policy or decision: Approach to the Energy Efficiency Retrofit of EFDC's Housing Properties

Officer completing the EqlA: John Taphouse Tel: 07734 315150 Email: jtaphouse@eppingforestdc.gov.uk

Date of completing the assessment: 21 May 2024

## Section 2: Policy to be analysed

2.1	<p>Is this a new policy (or decision) or a change to an existing policy, practice or project? New decision</p>
2.2	<p>Describe the main aims, objectives and purpose of the policy (or decision): <i>To agree an approach to improving the energy efficiency of EFDC's housing properties.</i></p> <p>What outcome(s) are you hoping to achieve (ie decommissioning or commissioning a service)? <i>To increase the minimum energy efficiency of Council owned homes to at least SAP band C by 2030 and ensure they are affordable to heat using decarbonised energy by 2050.</i></p>
2.3	<p>Does or will the policy or decision affect:</p> <ul style="list-style-type: none"><li>• service users</li><li>• employees</li><li>• the wider community or groups of people, particularly where there are areas of known inequalities?</li></ul> <p><i>The decision affects tenants of Council owned homes</i></p> <p>Will the policy or decision influence how organisations operate? <i>No</i></p>
2.4	<p>Will the policy or decision involve substantial changes in resources?</p> <p><i>Yes.</i></p> <p><i>The total cost of Phase 1 is estimated at £16.5m. Based on the grant contribution for our current retrofit project, we expect the net cost to EFDC to be approximately £10.0m including professional and other fees. This cost can be accommodated within the HRA business plan.</i></p> <p><i>We will require a client project manager for the energy efficiency retrofit programme. The gross salary cost would be approximately £60,000. Part of this cost may be grant funded.</i></p>

2.5	<p>Is this policy or decision associated with any of the Council's other policies and how, if applicable, does the proposed policy support corporate outcomes? Safer, Cleaner and Greener Implications:</p> <p><i>During Phase 1, we expect to reduce the CO2 emissions of our homes by approximately 1,300 tonnes/year.</i></p> <p><i>By the end of Phase 2, we expect all the homes we provide to be heated with decarbonised energy so the emissions will be zero.</i></p> <p><i>We will check and improve where necessary the ventilation of all the homes included in the retrofit programme to ensure the best possible indoor air quality. This will alleviate the consequences of allergens and mould that result from poor indoor air quality</i></p>
-----	--

## Section 3: Evidence/data about the user population and consultation<sup>1</sup>

As a minimum you must consider what is known about the population likely to be affected which will support your understanding of the impact of the policy, eg service uptake/usage, customer satisfaction surveys, staffing data, performance data, research information (national, regional and local data sources).

3.1	<p>What does the information tell you about those groups identified?</p> <p><i>We have information on the age, gender and disabilities of tenants. The information is not comprehensive. Information about occupants other than the tenants is less complete.</i></p> <p><i>The proposed approach to the energy efficiency retrofit of EFDC owned homes includes the requirement to design the work plan around the needs of the occupants. We will therefore discuss the proposed work with the occupants checking whether there are any specific needs we should take into account.</i></p>
3.2	<p>Have you consulted or involved those groups that are likely to be affected by the policy or decision you want to implement? If so, what were their views and how have their views influenced your decision?</p> <p><i>The proposed approach to energy efficiency retrofit was discussed with the Tenants' and Leaseholders' Panel on 12<sup>th</sup> June 2024. They are supportive of the proposal and did not recommend any amendments.</i></p>
3.3	<p>If you have not consulted or engaged with communities that are likely to be affected by the policy or decision, give details about when you intend to carry out consultation or provide reasons for why you feel this is not necessary:</p> <p><i>We will consult each household directly affected in order to tailor the works and timing to their needs as far as possible. This will be done as the programme rolls out.</i></p>

## Section 4: Impact of policy or decision

Use this section to assess any potential impact on equality groups based on what you now know.

Description of impact	Nature of impact Positive, neutral, adverse (explain why)	Extent of impact Low, medium, high (use L, M or H)
Age	<p>The outcome of the energy efficiency improvements will be positive.</p> <p>However, we will assess and account for any age-related factors in the planning and execution of the works at individual homes to minimise the impact.</p>	<p>Process: to be assessed and managed appropriately for each household. Impact low or medium.</p> <p>Outcome: Positive (impact high)</p>
Disability	<p>The outcome of the energy efficiency improvements will be positive.</p> <p>However, we will assess and account for disabilities in the planning and execution of the works at individual homes to minimise the impact.</p>	<p>Process: to be assessed and managed appropriately for each household. Impact low or medium.</p> <p>Outcome: Positive (high)</p>
Gender	<p>The outcome of the energy efficiency improvements will be positive.</p> <p>No specific adverse impact anticipated with respect to gender.</p>	<p>Process: to be assessed and managed appropriately for each household. Impact none.</p> <p>Outcome: Positive (high)</p>
Gender reassignment	<p>The outcome of the energy efficiency improvements will be positive.</p> <p>No specific adverse impact anticipated with respect to gender reassignment.</p>	<p>Process: to be assessed and managed appropriately for each household. Impact none.</p> <p>Outcome: Positive (high)</p>
Marriage/civil partnership	<p>The outcome of the energy efficiency improvements will be positive.</p> <p>No specific adverse impact anticipated with respect to marriage or civil partnership.</p>	<p>Process: to be assessed and managed appropriately for each household. Impact none.</p>



		Outcome: Positive (high)
Pregnancy/maternity	<p>The outcome of the energy efficiency improvements will be positive.</p> <p>However, we will assess and account for issues related to pregnancy or maternity in the planning and execution of the works at individual homes to minimise the impact.</p>	<p>Process: to be assessed and managed appropriately for each household. Impact low.</p> <p>Outcome: Positive (high)</p>
Race	<p>The outcome of the energy efficiency improvements will be positive.</p> <p>No specific adverse impact anticipated with respect to race.</p>	<p>Process: to be assessed and managed appropriately for each household. Impact none.</p> <p>Outcome: Positive (high)</p>
Religion/belief	<p>The outcome of the energy efficiency improvements will be positive.</p> <p>However, we will assess and account for issues related to religious observance and belief in the planning and execution of the works at individual homes to minimise the impact.</p>	<p>Process: to be assessed and managed appropriately for each household. Impact low.</p> <p>Outcome: Positive (high)</p>
Sexual orientation	<p>The outcome of the energy efficiency improvements will be positive.</p> <p>No specific adverse impact anticipated with respect to sexual orientation.</p>	<p>Process: to be assessed and managed appropriately for each household. Impact none.</p> <p>Outcome: Positive (high)</p>

## Section 5: Conclusion

		Tick Yes/No as appropriate	
5.1	Does the EqlA in Section 4 indicate that the policy or decision would have a medium or high adverse impact on one or more equality groups?	No ✓ <input type="checkbox"/>	
		Yes <input type="checkbox"/>	If ' <b>YES</b> ', use the action plan at <b>Section 6</b> to describe the adverse impacts and what mitigating actions you could put in place.

## Section 6: Action plan to address and monitor adverse impacts

What are the potential adverse impacts?	What are the mitigating actions?	Date they will be achieved.

**Section 7: Sign off**

**I confirm that this initial analysis has been completed appropriately.  
(A typed signature is sufficient.)**

Signature of Head of Service: John Taphouse	Date: 13 June 2024
Signature of person completing the EqIA: John Taphouse	Date: 13 June 2024

**Advice**

Keep your director informed of all equality & diversity issues. We recommend that you forward a copy of every EqIA you undertake to the director responsible for the service area. Retain a copy of this EqIA for your records. If this EqIA relates to a continuing project, ensure this document is kept under review and updated, eg after a consultation has been undertaken.

# Proposed Approach to EFDC's Housing Energy Efficiency Retrofit Programme

## Contents

<b>1</b>	<b>Introduction</b> .....	<b>2</b>
1.1	Asset Management Strategy .....	2
1.2	Our Progress So Far .....	2
<b>2</b>	<b>Where Are We Now?</b> .....	<b>2</b>
2.1	Current Energy Efficiency.....	2
<b>3</b>	<b>Where Do We Want to Be?</b> .....	<b>4</b>
3.1	By 2030 (Phase 1).....	4
3.2	By 2050 (Phase 2).....	4
<b>4</b>	<b>Phase 1 – All Properties to SAP band C</b> .....	<b>5</b>
4.1	EFDC's Principles to Improving the Energy Efficiency of our Homes .....	5
4.2	Choice of Measures in Phase 1.....	7
4.3	Customer Experience .....	8
4.4	Workstreams for Phase 1 .....	9
4.5	Estimated Cost of Phase 1 .....	12
4.6	Sources of Grant for Energy Efficiency Measures to Social Housing.....	13
4.7	Procurement.....	14
4.8	Delivery Structure for Workstream A (Quick Wins) .....	14
4.9	Delivery Structure for Workstream B (Grant Funded Retrofit Programme).....	14
4.10	Resource Requirements for Phase 1 .....	15
<b>5</b>	<b>Phase 2 – All Properties Ready for Net Zero</b> .....	<b>15</b>
5.1	Affordable to Heat with Decarbonised Electricity.....	15
5.2	Budget-led Approach.....	16
	<b>Appendix 1 – SAP Bands</b> .....	<b>17</b>
	<b>Appendix 2 – Measures Breakdown for Phase 1</b> .....	<b>18</b>

## 1 INTRODUCTION

---

### 1.1 Asset Management Strategy

EFDC's Housing Asset Management Strategy for the period 2024/25 to 2028/29 commits us to:

*Develop and put in place a Retrofit Energy Efficiency Strategy designed to meet our EPC and other related targets, prioritising a combination of 'easy wins' and the worst performing properties so all homes meet EPC C by 2030, with a plan for making the homes we provide ready for 'net zero' by 2050*

### 1.2 Our Progress So Far

We have started our programme of energy efficiency retrofit. Working with E.ON, we are delivering energy efficiency retrofit measures to 132 homes. These are mostly homes in rural areas with many off the gas grid. The works will enable the properties to achieve a SAP rating of at least band C. The project is part-funded by Wave 2.1 of the Social Housing Decarbonisation Fund (SHDF). The project is due to complete by April 2025.

---

## 2 WHERE ARE WE NOW?

---

### 2.1 Current Energy Efficiency

With the support of Parity Projects, we have estimated the energy efficiency of all homes in our stock. The estimates are based on:

- Energy Performance Certificates we hold – We have EPCs for 4,002 of our properties. The older EPCs are less reliable because there are likely to have been changes to the property.
- Additional data that EFDC hold on the properties including, the age, building type, heating system, insulation levels and window specification

Each energy efficiency score is accompanied by a confidence score according to the reliability of the data. Parity projects deliberately make a pessimistic assessment of energy efficiency.

The estimated scores are sufficient to enable us to develop our programme. However, we will confirm the SAP score of a property prior to determining which measures are required.

The analysis indicates that 2,374 homes have a SAP score that is in band D or lower. The mean SAP score is 69.4. This is slightly better than the average for social housing in England and Wales (68.4). It is significantly higher than the average for all tenures (60). The following diagram shows the banding of SAP scores. To achieve band C or better, the SAP score must be at least 69.

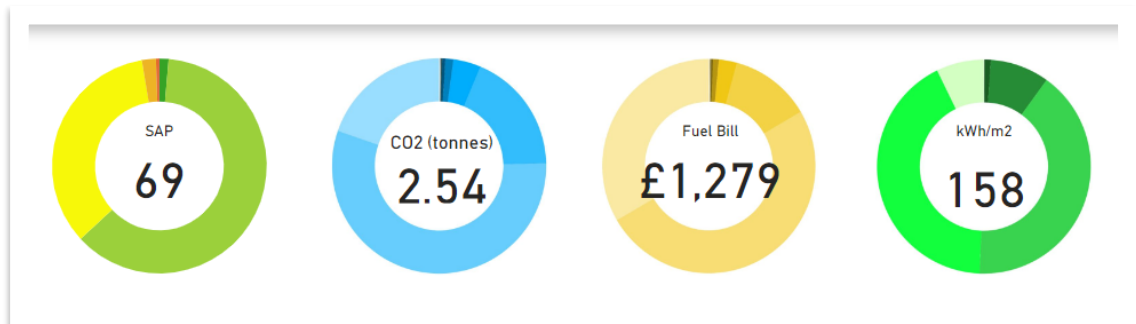


Figure 1 - Current Averages

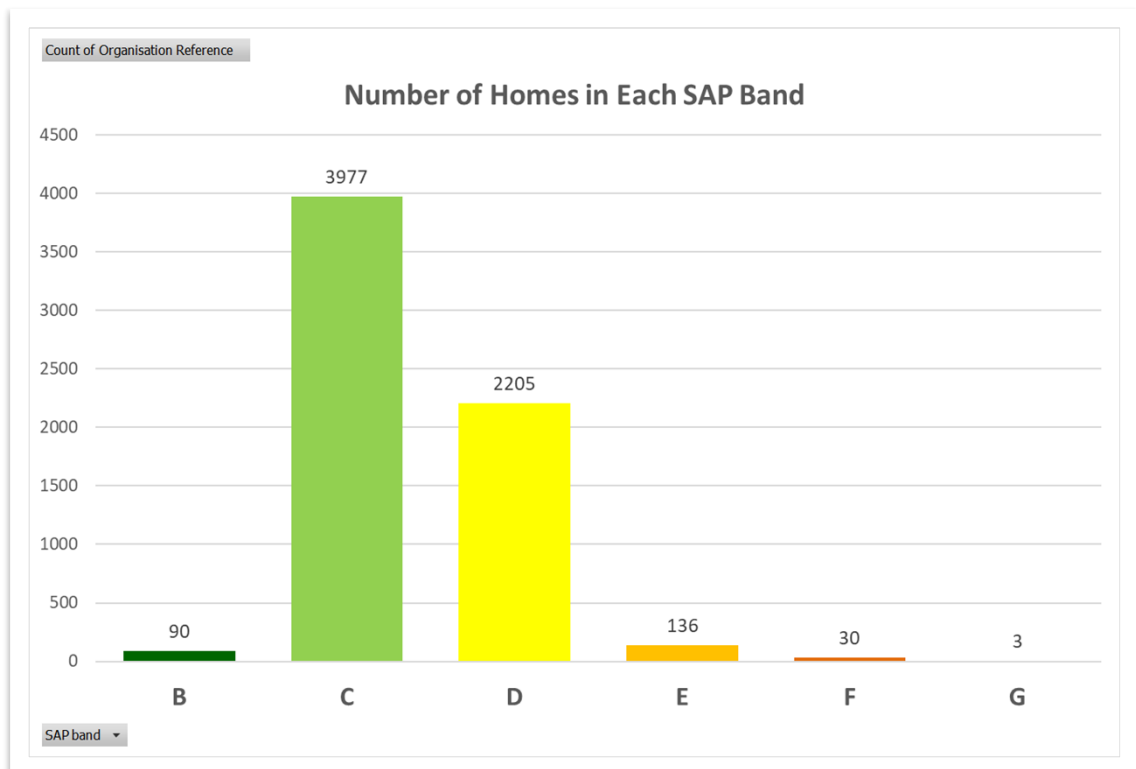


Figure 2 - Profile of the energy efficiency of EFDC's housing stock

Improving the SAP score will reduce fuel bills:

SAP Band	No. Homes	Estimated Average Annual Fuel Bill
B	90	£788.67
C	3977	£1,112.67
D	2205	£1,499.73
E	136	£2,427.22
F	30	£2,980.53
G	3	£6,036.13

Figure 3 - Estimated average annual fuel bill for properties in each SAP band

---

### 3 WHERE DO WE WANT TO BE?

---

#### 3.1 By 2030 (Phase 1)

**PHASE 1: By the end of 2030/31, all housing properties will be in SAP band C or above**

We estimate 2,374 homes are in SAP bands D to G. In line with the government target that all social housing is to achieve SAP band C, we will implement retrofit measures to ensure all the homes we provide are in SAP band C or better.

Whatever other measures we install during retrofit works, we will incorporate cost effective measures such as loft insulation top ups and low energy lights.

The work will include improvements to property ventilation as necessary to prevent damp and mould and maintain good indoor air quality.

#### 3.2 By 2050 (Phase 2)

**PHASE 2: We will be ready for net zero by 2050. All the homes we provide will be affordable to heat using decarbonised energy**

Our long-term aim is for all the homes we provide to be affordable to heat when the energy supply is fully decarbonised. Presently, the average energy required to heat the homes we provide is 158 kWh/m<sup>2</sup>/year.

Fossil fuels, most notably gas, will be phased out by 2050. The government have indicated that gas boilers will not be available to purchase from 2035.

The most likely replacement source of energy will be electricity. Hydrogen is unlikely to be cost effective or available at scale. The cost of electrical energy is currently three to four times more than gas.

Our homes need to be made much more energy efficient to be affordable to heat with electricity.



## 4 PHASE 1 – ALL PROPERTIES TO SAP BAND C

---

### 4.1 EFDC's Principles to Improving the Energy Efficiency of our Homes

#### **Our priority is to minimise the fuel bills for our customers**

Most retrofit measures will reduce carbon emissions and reduce energy bills. However, some measures offer a reduction in emissions but could result in higher bills. As an example, low carbon heating, such as an air source heat pumps, can be more expensive to install and more expensive to run than gas fired heating. However, over time, we expect low carbon heating products to improve and their cost reduce.

Where we have a choice, EFDC will prioritise minimising energy bills. When replacing the heating system of a property with gas heating, it is likely we will replace it with efficient gas heating. This approach will continue until the sale of new gas boilers ceases (expected 2035), or when heat pumps become sufficiently viable.

The SAP rating of a home is the assessment of its energy efficiency. The cost per SAP point improvement will therefore be a key consideration in prioritising the measures we install.

#### **Healthy indoor air quality is a key part of this energy efficiency programme**

Ensuring good indoor air quality will be central to EFDC's approach to meeting energy efficiency targets. Poor indoor air quality, such as high levels of humidity, can manifest itself as mould growth, dust mites and other allergens that affect the health and wellbeing of our customers.

There is a risk that retrofit measures, such as increasing airtightness, will make indoor air quality worse. Inadequate ventilation can result in increased relative humidity and poor air quality.

We will check the ventilation provision in all the homes included in retrofit projects. Where necessary we will upgrade ventilation systems. As a minimum, kitchens and bathrooms will be provided with modern, continuous running extract fans with a humidistat operated boost.

#### **We will make the fabric suitable before fitting low carbon heating**

If the insulation and airtightness of a home is not adequate, a heat pump can consume a lot of electrical power and still may not be able to get the home to a comfortable temperature. Where we do fit low carbon heating, we will improve the fabric as necessary.

#### **We will incorporate energy efficiency into other planned work programmes**

Where properties are due planned component replacements (such as windows, roofs or heating), we will take the opportunity to make improvements to the property's energy efficiency.

We will specify products that are more energy efficient. This will include the new windows, replacement heating systems and upgrading insulation when we replace roofs.

Our design will ensure we are ready for future energy efficiency retrofit works such as facilitating future installations of heat pumps (e.g. identifying space for heat pumps and hot water cylinders) and wall insulation (e.g. windows that facilitate external wall insulation).

This will apply to all our properties, not just those below SAP band C.

#### **We will look at options if retrofit is not viable**

If the cost of retrofit (because of challenges of construction type or planning restrictions) is particularly high, we will consider options.

We will retain a property and carry out appropriate retrofit works if our data shows the property is a popular place to live and its net present value (including the cost of retrofit works) means the property will be financially viable.

If a property does not meet our performance threshold, we will carry out an appraisal on the options. This may include selling the property (and reinvesting the proceeds) and redeveloping the site.

#### **We will evaluate the outcomes of our retrofit works**

We will check the retrofit work we have done has achieved the intended benefits.

We will compare before and after SAP ratings.

We will survey all customers to understand their satisfaction with the experience of the retrofit works and the difference the works have made to the comfort and affordability of their home. We will use this information to make continual improvements to the design of the retrofit measures and the installation process.

We will use remote sensors at a sample of homes to assess the improvement made by retrofit works. The sensors will monitor energy use, temperature, relative humidity and carbon dioxide levels. Ideally, we will monitor homes for a full year before the retrofit works and a full year after. In some cases, we may only be able to monitor post works. However, this will still enable us to confirm the effectiveness of the heating and the indoor air quality.

We may undertake sample airtightness tests and thermal images to provide further assurance of the effectiveness of the retrofit measures.

## **4.2 Choice of Measures in Phase 1**

The following is a list of measures we prefer, and measures we will tend to avoid, during the first phase of EFDC's retrofit programme (to get all properties up to EPC band C at least).

### ***Preferred Measures***

#### **Low cost, low disruption measures**

This can include loft insulation, hot water cylinder insulation, low energy lighting and improved heating controls.

#### **Fabric improvements**

Fabric improvements (insulation and airtightness) will make a noticeable difference to the thermal comfort in a home. We favour loft, cavity wall and external wall insulation. Under floor and internal wall insulation can be very disruptive.

Fabric improvements can have a relatively high initial cost but, if properly installed, the ongoing costs will be very limited.

#### **Photovoltaic (PV) panels**

PV panels offer a cost-effective means to improve the SAP rating of a home and can reduce electric bills by hundreds of pounds. The work is mostly external and can be completed within a few days, so the disruption is limited.

Where PV is installed at houses, the electricity generated can be used in the home. Where PV is installed at blocks or schemes, the electricity may be used for the communal areas with a consequent saving in service charges. Alternatively, we may provide metered supplies to flats within a block.

We will not generally fit battery storage in houses due to the initial cost and the lifecycle cost of replacements. If the home has a hot water tank, we may divert excess power to heat the water. Otherwise, excess energy will be diverted to the grid to generate income for the tenant or for EFDC.

We may fit battery storage at blocks or schemes to keep service charges as low as possible.

#### **Ventilation improvements**

The Retrofit Assessment (made prior to retrofit works) will include a review of the ventilation provision in the home and produce a ventilation strategy. The retrofit works will ensure the ventilation of the home is adequate to prevent condensation and mould and provide good indoor air quality.

### ***Measures We Prefer to Avoid***

#### **Low carbon heating at properties that currently have gas heating**

Low carbon heating (such as heat pumps and modern storage heaters) is likely to cost more to run than gas-fired heating. When a gas boiler reaches the end of its life, we will replace it with a modern efficient gas boiler.

If low carbon heating technology improves or there are restrictions on gas fired heating products or if the cost of electrical energy reduces relative to gas, we will review this preference.

#### **Solar thermal water heating**

Solar thermal panels can be fitted to the roof. Water is pumped through an array of pipes where the sunlight increases its temperature. This means less energy is used to get hot water to the required temperature. However, solar thermal heating is not very effective in the UK, it is a heavy load on the roof structure and is a maintenance liability.

#### **Under floor insulation**

Installing floor insulation in an occupied home is usually very disruptive. However, it may be considered for void properties or where it is possible to install the insulation without it causing disruption.

#### **Internal wall insulation**

Installing internal wall insulation in occupied properties would be disruptive to the tenants. It will make room areas smaller and requires consequential work to skirting boards, fitted furniture (such as kitchen units) and carpets. There is a manageable risk that internal wall insulation will create a 'dew point' within the wall where vapour can condense (e.g. at the interface between the insulation and original wall). However, internal wall insulation may be the only option for some heritage buildings or properties built to the boundary line. In these cases, the internal wall insulation must be designed carefully.

#### **Measures with a high cost per SAP point improvement**

This will include new innovations that are not yet accredited for inclusion in the government's SAP calculations.

### **4.3 Customer Experience**

Successful delivery of our programme to retrofit energy efficiency measures relies on positive customer engagement. Installing measures can be disruptive so we want to make the process as painless and as worthwhile as possible.

Each tenant has their own needs. To help us design the retrofit package we have to understand the energy use in their home – temperature settings, hot water usage, indoor air quality, energy costs.

Once we are on site, we will contact our tenant regularly to check on how they feel about the experience and keep them updated on what works to expect for the remaining days. If plans change, we will ensure they are kept up to date.

When selecting equipment for installation (e.g. a new heating system), we prefer products that are easy to operate and supported by smart technology where appropriate. As well as keeping the controls as simple as possible, we will explain how to get the most from the new measures. We will also provide this explanation to subsequent tenants when the property is relet.

***What's going to happen and when?***

We will communicate a provisional improvement plan for each tenant's home indicating which year we are likely to undertake retrofit works at their home. Whilst we cannot be specific about which measures we will install until the retrofit assessment, we will give as much information as possible on what they can expect.

***Tenant choice and refusals***

We understand that some tenants will be reluctant to have the works done. We will discuss any concerns explaining how we will minimise disruption and explain the benefits they can expect of thermal comfort and fuel savings. Our aim is to bring all our social housing to the target energy efficiency standard. We are determined that all the homes EFDC provides achieve a minimum level of energy efficiency. We may defer properties to later in the programme if there is a reason the works cannot be done at that time.

***Leaseholders***

Where we are installing energy efficiency measures to blocks, we will include leasehold flats where appropriate (e.g. external wall insulation). Where the lease allows, we will recharge a proportion of the cost. If the lease does not allow recharge of improvements, there will be no charge to the leaseholder.

Where we are installing measures within homes (e.g. ventilation, draught proofing or low energy lights), we will offer the improvement to leaseholders at cost plus an administration fee.

**4.4 Workstreams for Phase 1**

## Phase 1 - SAP band C by the end of 2030/31

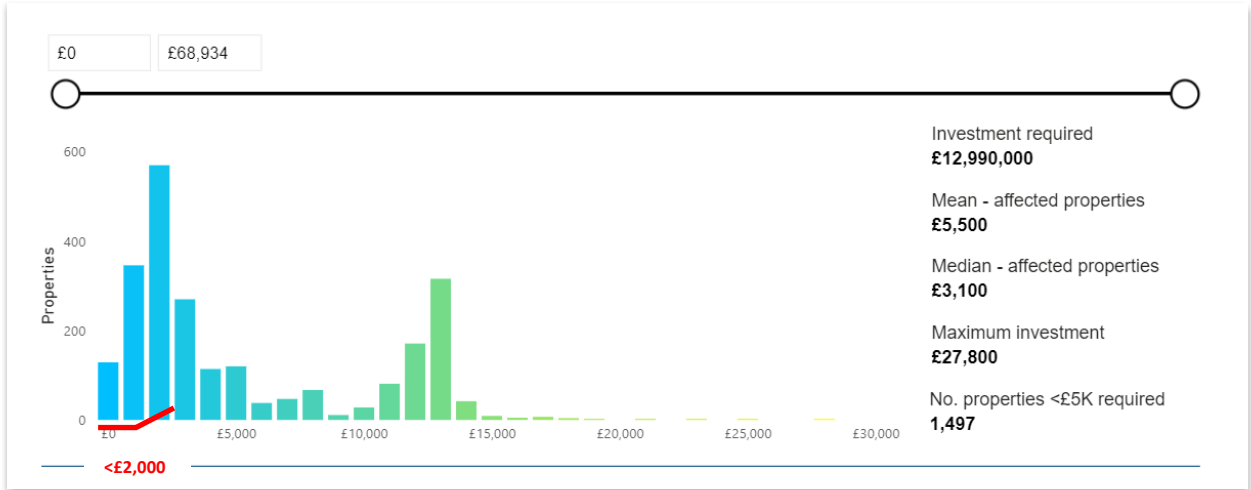
**Workstream A - Easy Wins**

- about 1,000 homes can achieve C for less than £2,000 investment
- low cost and low disruption measures such as loft insulation top ups, improved heating controls or low energy lighting

**Workstream B - Grant Funded**

- about 1,300 properties require more significant measures to achieve C
- bid for grant funding
- follow the PAS2035 process using Trustmark accredited contractors

The government target is for all social housing to achieve at least SAP band C by 2030. According to the analysis carried out by Parity Projects, 2,374 (36.9%) EFDC homes are in SAP band D or below. Of these, 1,045 are estimated to require less than £2,000 investment to achieve SAP band C.



**Workstream A - Easy Wins (under £2,000)**

This workstream will focus on the estimated 1,045 homes that require less than £2,000 investment to achieve SAP band C. We expect to be able to reach band C with low cost and low disruption measures such as loft insulation top ups, improved heating controls or low energy lighting.

We will confirm the SAP rating with a domestic energy assessment. There will be three possible outcomes:

Outcome of SAP Assessment	Action
The home is in band C already	No further action required
The home can achieve SAP band C with less than £2,000 investment	Identify and carry out the measures required
The home requires more than £2,000 investment to achieve SAP band C	Refer the property to Workstream B

Workstream A will comprise low-cost and relatively simple measures. We will not seek grant funding. We will use competent contractors. However, they do not necessarily need to PAS2030 accredited (as would be required by grant funders).

### ***Workstream B – Grant Funded Retrofit Programme***

This workstream will cover the 1,329 properties estimated to require more than £2,000 investment to achieve SAP band C. These properties will require more significant and expensive, measures. The design and installation will follow the process set out in PAS2035 to ensure the work completed correctly and with no unintended consequences.

We will bid for grant funding to contribute to the cost of these works. Funders will require that we follow the PAS20235 process and use PAS2030 accredited contractors.

We will develop a programme that allocates these properties to a year between 2026/27 and 2030/31.

Prior to the works we will undertake a Retrofit Assessment (in accordance with PAS2035). This will confirm the SAP score of the property and recommend the measures required to achieve band C. The retrofit assessment will also identify measures required to make the property ready for net zero.

Outcome of SAP Assessment	Action
The home is in band C already	No further action required
The home can achieve SAP band C with less than £2,000 investment	Refer the property to Workstream A
The home requires more than £2,000 investment to achieve SAP band C	Confirm inclusion of the property in Workstream B

### ***Outcomes of Phase 1***

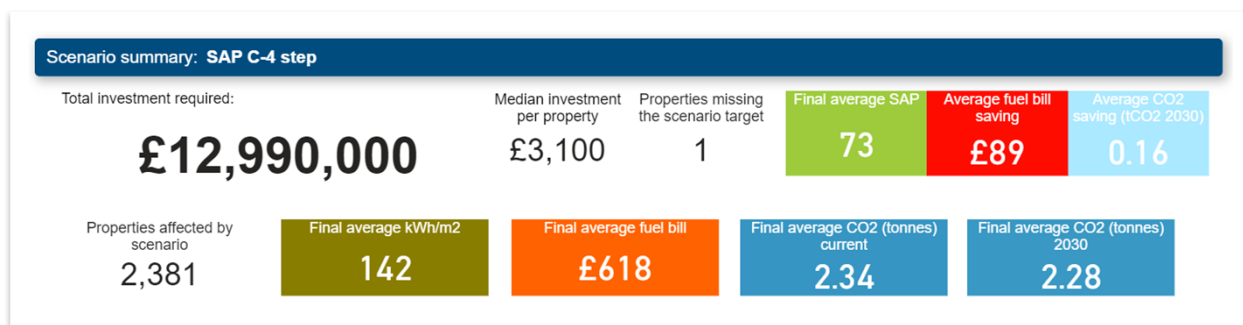
Of homes included in Phase 1:	Before	After	Improvement
Mean SAP	63.1	74.1	11.0
Mean energy demand (kWh/m <sup>2</sup> )	190	148	42
Mean fuel bill	£1,586	£1,152	£434
CO <sub>2</sub> (tonnes/year)	7,200	5,900	1,300

#### 4.5 Estimated Cost of Phase 1

Analysis by Parity Projects estimates the works cost of improving properties to achieve at least SAP band C is £12,99,000. This equates to an average cost of £3,100 for each of the homes requiring improvement.

This cost includes ventilation improvements and cost-effective fabric improvements (insulation and airtightness) at each home included in the programme.

The total works cost is estimated at:



#### Workstream A (Quick Wins)

Cost Item	Estimate ('000)
Retrofit assessments for properties (@ £300ea)	£313
Works (@ £1,250/property)	<u>£1,300</u>
Sub-total	£1,613
Fees (10%)	£160
Contingency (10%)	£160
Less grant	£nil
<b>Total (Workstream A)</b>	<b>£1,933</b>



Workstream A will be fully funded by EFDC

**Workstream B (Grant Funded Retrofit Programme)**

Cost Item	Estimate ('000)
Retrofit assessments for properties (@ £300ea)	£400
Works (£12,990k less £1,300k)	<u>£11,690</u>
Sub-total	£12,090
Fees (10%)	£1,209
Contingency (10%)	£1,209
Less grant (assume 45%*)	-£6,530
<b>Total (Workstream B)</b>	<b>£7,978</b>

*\*based on grant contribution to current project*

Workstream B will be co-funded by EFDC supported by grant funding. The grant funding provided for our first retrofit project is approximately 45%.

#### 4.6 Sources of Grant for Energy Efficiency Measures to Social Housing

There are currently two sources of grant funding available to improve the energy efficiency of existing social housing:

**Social Housing Decarbonisation Fund (SHDF)**

SHDF funding is released in waves. Wave 2.1 provides £778 million of government funding. Wave 2.2 will add a further £80m. Wave 3, which is expected to run from April 2025 to March 2028, will provide £1.25 billion of government funding.

Our current project to improve 132 homes is part funded with approximately £1.5m from SHDF Wave 2.1.

Social housing below SAP band C is eligible for SHDF. Homes must reach SAP band C, or SAP band D where this is not possible for properties starting in SAP band F or G.

SHDF is likely to be our major source of grant funding over the next few years.

**Energy Company Obligation 4 (ECO4)**

Social housing properties in SAP band E or below are eligible and can receive insulation measures, first time central heating and renewable heating. Properties in SAP band D are eligible only if they are receiving innovation measures. Target is for properties starting in SAP band D or E must be improved to SAP band C. Properties starting in SAP band F or G must be improved to SAP band D.

We only have 169 properties that would be eligible for ECO4 funding. We will investigate the options of applying for ECO4 funding to improve these properties or to include them in bids we make for SHDF funding, or other sources of funding that become available.

## 4.7 Procurement

### *General Objectives*

The objectives for contracts we procure for our retrofit works are:

- Cost effectiveness - we get the greatest improvement in energy efficiency for the funding we have available
- Ability – Suitably accredited
- Customer service - our tenants are satisfied with both the completed product and their experience of the delivery process
- Community benefits - the process of delivering retrofit works is a catalyst for developing and sustaining the local economy and communities including training and jobs for local people
- Continuous improvement - we have performance management mechanisms to enable us to make improvements during projects and project-by-project

## 4.8 Delivery Structure for Workstream A (Quick Wins)

### *Retrofit Assessors*

We will appoint independent Retrofit Assessors who will undertake a full assessment of each property allocated to Workstream A. The scope of the retrofit assessment is mandated by PAS2035. It is a detailed survey of the property and advice on measures to bring the property to the target standard. It will also provide a medium-term plan to make the property ready for net zero.

The Retrofit Assessors must be suitably qualified and demonstrate a track record of reliable assessments and customer service.

### *Installers*

We may appoint Qualis to deliver the energy efficiency improvement measures. Qualis will need to demonstrate they have the skills and quality assurance necessary to install the measures in accordance with best practice. We may appoint other Installers to provide additional capacity and additional skills.

## 4.9 Delivery Structure for Workstream B (Grant Funded Retrofit Programme)

### *Retrofit Assessors*

As above.

### *Installers*

The Installers we use must be Trustmark accredited (i.e. meet the requirements of PAS2030).

Our preference is to appoint one or two Installers for the duration of Workstream B under a term contract. However, the timetable for the next wave of grant funding (SHDF Wave 3) has not yet been published. If the grant funding requires an early appointment of an Installer, we may expedite the procurement process for the next project to secure the grant funding. In this case the Installer will be appointed for a single project. During the project we will run a procurement process for term contract(s) to deliver the remainder of the Phase 1 programme.

The Installers we appoint will have the competency and capacity to deliver the programme. They must also have a track record of excellent customer service and offer competitive prices.

The advantages of appointing Installers under a term contract, rather than tendering each project, include:

- Long term contracts will be more attractive to the market, so prices are likely to be more competitive
- Once the term contracts are in place, there will be less delay in starting work on each project
- There will stability in the team delivering the programme of projects
- It will enable continuous improvement from project to project
- It will provide the basis for effective community benefits such as local employment and apprenticeships

#### **4.10 Resource Requirements for Phase 1**

##### ***Retrofit Programme Manager***

The Retrofit Programme Manager will be responsible for coordinating the works that make up Workstream A and project management of Workstream B.

This will be a new post partly funded by grant.

##### ***Resident Liaison Officer***

EFDC's Resident Liaison Officer will have a critical role in ensuring a positive customer experience including working closely with tenants who have concerns about the proposed works. They will liaise with the Installers in adapting work plans around the needs to the tenants.

There is already a Resident Liaison Officer in post.

---

## **5 PHASE 2 – ALL PROPERTIES READY FOR NET ZERO**

---

### **5.1 Affordable to Heat with Decarbonised Electricity**

Fossil fuels, most notably gas, will be phased out by 2050. The government have indicated that gas boilers will not be available to purchase from 2035.

The most likely replacement source of energy will be electricity. Hydrogen is unlikely to be cost effective or available at scale. The cost of electrical energy is currently three to four times more than gas.

Our homes need to be made much more energy efficient to be affordable to heat with electricity. Following Phase 1, our starting point will be that all EFDC's housing properties will be at least SAP band C.

## **5.2 Budget-led Approach**

Phase 1 will have used the most cost-effective measures to increase SAP scores. As we move into Phase 2, the cost of measures to make equivalent energy efficiency improvements is likely to be greater - the law of diminishing returns.

Our approach will be to achieve the highest level of minimum energy efficiency for the amount EFDC can allocate within the constraints of a sustainable business plan.

**John Taphouse**

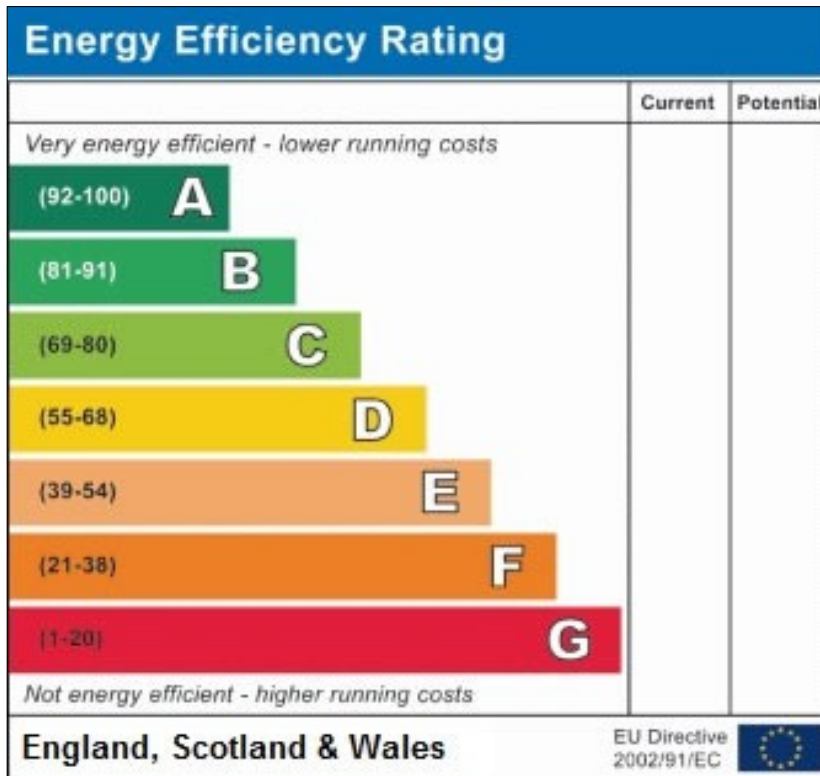
**Interim Head of Asset Management**

**June 2024**

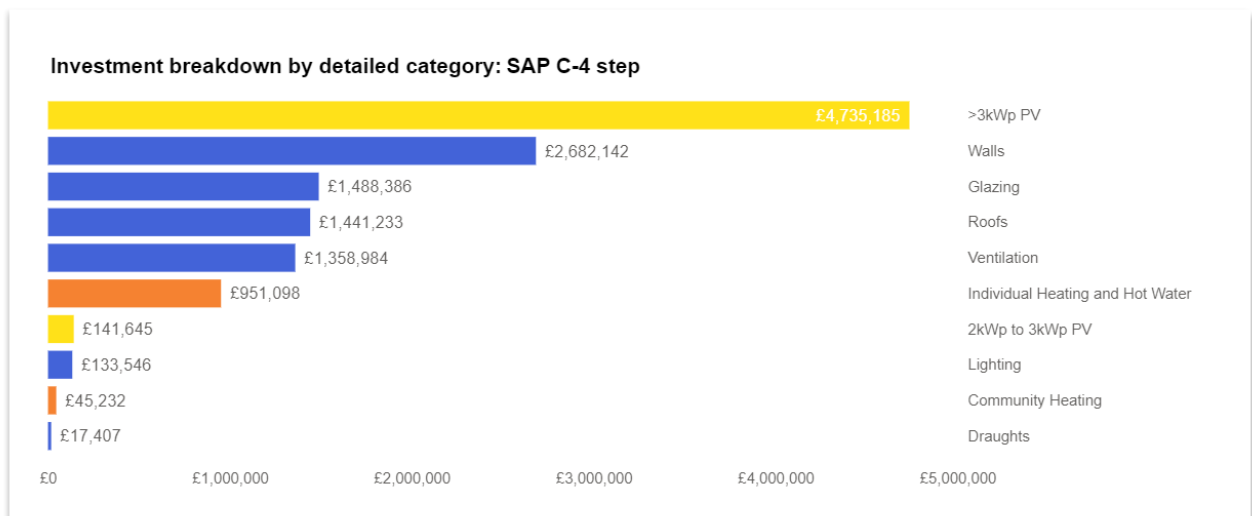
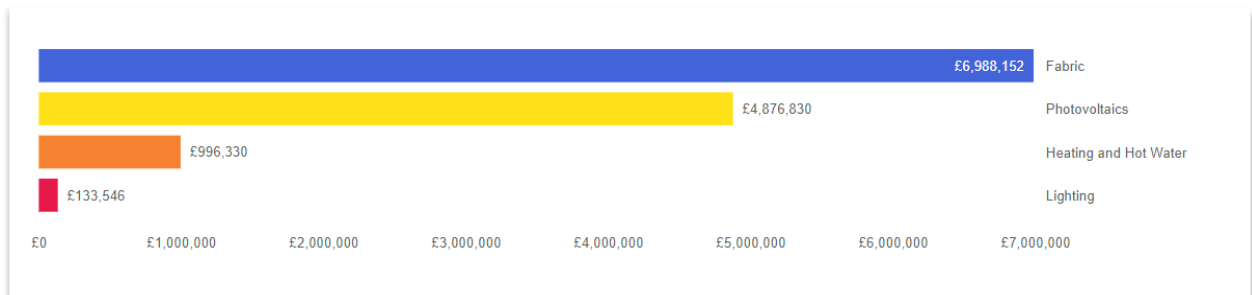
---

**APPENDIX 1 – SAP BANDS**

---



## APPENDIX 2 – MEASURES BREAKDOWN FOR PHASE 1



	Investment	No. Measures	Average Cost
>3kWp PV	£4,735,185	611	£7,750
Walls	£2,682,142	1557	£1,723
Glazing	£1,488,386	860	£1,731
Roofs	£1,441,233	1036	£1,391
Ventilation	£1,358,984	3966	£343
Individual Heating and Hot Water	£951,098	427	£2,227
2kWp to 3kWp PV	£141,645	23	£6,158
Lighting	£133,546	2158	£62
Community Heating	£45,232	14	£3,231
Draughts	£17,407	70	£249
<b>Total</b>	<b>£12,994,858</b>	<b>10722</b>	<b>£1,212</b>

Approach to the EFDC's Retrofit Programme

Fabric 3518 £5,619,325	Walls 1548 £2,669,215	Cavity 1384 £2,192,315	Cavity Insulation 853 £1,236,591	Insulate Party Wall 711 £955,724	
		Solid 4 £41,559	External to Solid 4 £41,559		
		System 14 £143,867	External to System 14 £143,867		
		Other 187 £291,474	Alternate Wall 187 £291,474	Internal to Alternate Wall 53 £207,396	
	Roofs 1038 £1,441,233	Loft Insulation 884 £1,237,811	Virgin to 300mm 288 £419,043	Top Up to 300mm 718 £818,768	
		Flat Roof Insulation 52 £203,422			
	Glazing 890 £1,488,386	Double 4 £28,818	A+ rated 4 £28,818		
		Doors 568 £1,459,568			
	Draughts 70 £17,407	Chimneys 82 £14,872			
		Doors and Windows 8 £2,535			
	Ventilation 1 £3,084	Add Mechanical Ventilation 1 £3,084			
	Heating and Hot Water 433 £996,330	Community Heating 14 £45,232	Community Heating Controls 8 £6,144		
Community Heating System 8 £39,088			Gas Community 4 £20,960	Gas Community CHP 4 £18,128	
Heating System 316 £905,519			Radiator System 240 £575,251	Gas 87 £260,505	Oil 6 £23,250
			Electric Storage System 82 £190,365	Gas with FGHRs 138 £291,496	
			Heat Pump System 8 £119,143	55 Degree ASHP 2 £30,066	45 Degree ASHP 1 £15,033
			Extend Heating System 2 £2,112	35 Degree ASHP 8 £74,044	
			Underfloor Heating 2 £18,648		
			Hot Water Cylinder 2 £186		
			Cylinder Thermostat 31 £2,139		
Hot Water 38 £9,922			Switch from Alternative 8 £7,597		
		Secondary Heating 20 £920	Remove Secondary Heating 20 £920		
Controls 18 £7,492			Standard 16 £6,772		
			Zoned 1 £720		
	WWHRs 16 £22,605				
Tariff Switch 14 £4,640		Single to Dual 10 £4,000			
		Dual to Single 4 £640			
Lighting 2168 £133,546					
Photovoltaics 834 £4,876,830	Install PV 834 £4,876,830	Horizontally 21 £165,375			
		On a pitched roof 813 £4,711,455			
Data 8 £	Heating Data 8 £				
Non SAP Non-Energy Works 3866 £1,355,900					





# **Report to the Cabinet**

**Report reference:** C-00?-2024/25

**Date of meeting:**



**Epping Forest  
District Council**

**Portfolio:** Housing and HGGT (Cllr Nigel Bedford)

**Subject:** Approach to the Energy Efficiency Retrofit of EFDC's Housing Properties

**Responsible Officer:** Surjit Balu, Interim Director for Housing  
([sbalu@eppingforestdc.gov.uk](mailto:sbalu@eppingforestdc.gov.uk))

**Democratic Services Officer:** V Messenger ([democraticservices@eppingforestdc.gov.uk](mailto:democraticservices@eppingforestdc.gov.uk))

---

## **Recommendations/Decisions Required:**

To approve the proposed approach to the programme for improving the energy efficiency of EFDC's housing properties.

## **Executive Summary:**

The UK is legally required to achieve net zero carbon emissions by 2050. As part of that journey, the government has set a target for all social housing to meet an energy efficiency standard of SAP band C by 2030.

EFDC currently have a retrofit project on site improving 132 homes. This is due to complete by March 2025. The total cost of this project, including fees, is forecast at £4.2m. This is supported by grant funding of £1.7m.

The attached report sets out the proposed approach for delivering the remainder of the energy efficiency retrofit programme.

## **Report:**

The attached report proposes two phases:

### **Phase 1 – All homes to achieve SAP band C by 2030**

There are approximately 2,300 homes that currently fall below SAP band C. This phase will comprise two workstreams

- Workstream A – 'Easy Wins' – Comprises approximately 1,000 homes that require less than £2,000 investment to reach SAP band C. These works will be relatively straightforward (e.g. loft insulation top ups and low energy lights) and could be carried out by competent (but not necessarily fully accredited) local contractors. Qualis may be able to deliver most or all these improvements. The cost of this workstream is estimated at £2.0m.
- Workstream B – The remaining 1,300 homes will require more significant work. These, more complex, works will need to be carried out by accredited contractors. Accreditation will be a requirement of grant funders. The cost of this workstream is estimated at £14.5m. Based on the rate of grant contribution of our current retrofit project, the expected net cost to EFDC will be £8.0m.

The total net cost of Phase 1 is estimated at £10.0m. This can be supported by the HRA business plan.

### ***Phase 2 – All homes to be affordable to heat using decarbonised energy by 2050***

The exact format of Phase 2 will be dependent on budget availability. The goal will be to achieve the highest level of minimum energy efficiency for the amount EFDC can allocate within the constraints of a sustainable business plan. EFDC's approach to Phase 2 will need to be confirmed prior to 2030.

#### **General Principles**

The report proposes principles to follow in the delivery of Phase 1 of this programme. The principle to bring to Cabinet's particular attention is "our priority is to minimise the fuel bills for our customers".

Most energy efficiency measures will reduce bills and reduce carbon emissions. However, certain measures, notably replacing a gas boiler with a heat pump, will reduce carbon emissions but is unlikely to reduce fuel bills. The effect of this principle is that, where a home has gas heating, we will replace it with efficient gas heating when the current boiler reaches the end of its serviceable life. The government have indicated that gas boilers will cease to be available to purchase in 2035. We expect heat pump technology to have improved by then, and that the costs will reduce. Phase 2 will include replacement of gas with low carbon heating such as heat pumps.

#### **Scrutiny Comments:**

*Add following comments from Scrutiny Committee*

#### **Resource Implications:**

The total cost of Phase 1 is estimated at £16.5m. Based on the grant contribution for our current retrofit project, we expect the net cost to EFDC to be approximately £10.0m including professional and other fees. This cost can be accommodated within the HRA business plan.

We will require a client project manager for the energy efficiency retrofit programme. The gross salary cost would be approximately £60,000. Part of this cost may be grant funded.

#### **Legal and Governance Implications:**

The government target is for all social housing to achieve SAP band C by 2030. Phase 1 will deliver this target for EFDC.

The government has legislated that the UK is to reach net zero carbon emissions by 2050. Phase 2 will make EFDC homes affordable to heat using decarbonised energy.

#### **Safer, Cleaner and Greener Implications:**

During Phase 1, we expect to reduce the CO<sub>2</sub> emissions of our homes by approximately 1,300 tonnes/year.

By the end of Phase 2, we expect all the homes we provide to be heated with decarbonised energy so the emissions will be zero.

We will check and improve where necessary the ventilation of all the homes included in the retrofit programme to ensure the best possible indoor air quality. This will alleviate the consequences of allergens and mould that result from poor indoor air quality.

#### **Consultation / Scrutiny Undertaken:**

The have been involved in the development of EFDC’s approach to energy efficiency retrofit:

- Tenants’ and Leaseholders’ Panel
- Leadership team
- Housing Management team
- Communities Scrutiny Committee

The final draft of the housing asset management strategy will be reviewed by the Portfolio Holder for Housing and HGGT prior to its presentation to Cabinet for approval.

**Background Papers:**

Proposed Approach to EFDC’s Energy Efficiency Retrofit Programme

**Risk Management:**

The key risks to the energy efficiency retrofit programme include:

Risk	Action to Mitigate
<b>Actual costs exceed estimates</b>	Receive regular updates from Parity Projects’ cost schedule and re-run scenarios with revised costs. Select cost effective retrofit measures. Contract structure and work programming to maximise cost effectiveness. Competitive tendering of contracts.
<b>Grant funding not at assumed rate</b>	Recruit project manager with a track record of grant bidding and working effectively with funders.
<b>Delays due to procurement</b>	Start procurement process as soon as possible after approach agreed. Generate interest in the programme to attract suitable Installers to bid.
<b>Refusals from tenants resulting in non-completion of the programme</b>	Select Installers with a track record of effective resident liaison. Work closely with tenants and develop work plans that account for individual needs and concerns.

**Equality:**

The Equality Impact Assessment is attached. There are no medium or high adverse impacts on any equality group.

# Agenda Item 8

## Report to Communities Scrutiny Committee

**Date of meeting: 25<sup>th</sup> of June 2024**

**Portfolio:** Property & Housing (Cllr Nigel Bedford)

**Subject:** Housing and Property Services  
Year End Performance & Tenant Satisfaction  
Measures Outcome



**Officer contact for further information:**

**Surjit Balu, Interim Director for Housing**  
([sbalu@eppingforestdc.gov.uk](mailto:sbalu@eppingforestdc.gov.uk))

**Democratic Services Officer:**

L Kirman: email: [DemocraticServices@eppingforestdc.gov.uk](mailto:DemocraticServices@eppingforestdc.gov.uk) tel:01992 564243)

---

### Recommendations/Decisions Required:

1. To consider and comment upon on the 2023-24 year-end Housing & Property services performance.
  - a. Key Performance Metrics
  - b. Tenant Satisfaction Measures

### Report:

#### 1. Background

#### Housing & Property Services (Housing)

Local performance measures enable us to track, forecast and improve performance. We have a suite of key performance indicators (KPIs) and measures that are monitored throughout the year, with service managers and teams being held accountable for performance through regular meetings.

A summary of the year-end performance position for 2023/24 is detailed in **Tables 1 & 2** below. The performance information has been separated into two key areas: Housing Management and Property Compliance. Performance has been strong across Housing during 2023/24 and the tables highlight the position for our headline KPIs. There is a range of additional management information monitored by Housing teams and for this year, 2024/25, we have expanded the range for performance information being gathered to gain a better understanding of our performance.

We have over the last year improved the quality of our data and systems for monitoring data, this further adds to data quality and data integrity.

More broadly, it is fair to say the regulatory landscape over the last couple of years has placed increasing demands on social housing providers to collect and use performance information to inform services and, to provide transparency to tenants. To note, our Annual Report to tenants also provides details of our key performance.

Last year, 2023/24 also saw the introduction of the new Tenant Satisfaction Measures (TSMs). The Regulator of Social Housing's new TSMs were introduced in April 2023 and required all social housing providers with more than 1,000 homes to report their results each financial year.

The TSMs are a core set of performance measures against which all providers must publish their performance. In addition to its specific expectations, the TSM Standard includes the required outcome that providers must collect and provide information to support effective scrutiny by tenants of their landlord's performance.

The central aims of the TSMs are to provide tenants with greater transparency about their landlord's performance and inform the regulator about how a landlord is complying with consumer standards. To achieve these aims it is critical that TSMs are calculated and reported by providers on a consistent basis.

There are 22 TSMs, these are made up of 12 tenant perception measures (TPM), and 10 management information measures (MI). The themes and measures are summarised in **Table 3** and a summary of the outcomes is detailed in **Table 4**.

Most of the TSMs are captured through a tenant survey similar to the previous STAR survey that members may be familiar with. The STAR survey had been in place for many years prior to being replaced.

## **2. Housing Services Performance**

The performance information below has been broadly split into two key areas: Housing Management, and Property Services. Much of the performance information within Property Services as detailed below, will form part of the submission to the Regulator of Social Housing within the Tenant Satisfaction Measures requirement for the end of the current financial year.

In summary, we have a strong position in relation to current performance, the headlines of which are below.

**Table 1 - Housing Management – Year end 31<sup>st</sup> March 2024**

Measure	Target	Performance
Income management: Current Arrears	1.60%	1.31%  Improved from 1.67% in April 2023 Annual Rent roll £39.7m Arrears £519k
Number of households in Temporary Accommodation at any one time	<100	118  The number fluctuated between 106 and 123 households during the year
Number of families in B&B for 6 weeks or more  Statutory Obligation	0	0  No families were in B&B for more than 6 weeks
Lettings - % properties advertised within notice period (where possible)	85%	88%  The performance ranged from 78% to 91% throughout the year
Lettings - void properties let within 5 working days of being ready to let (post repairs)	85%	86%  Year-end position was 86%. The average performance for the year was 92.2%. Performance ranged from 88% to 100%.
Home Ownership  % of applications processed within statutory timescales	100%	100%  Performance maintained throughout year
Complaints  % of complaints received and resolved within set timescale	100%	94%  Target 100%

**Table 2 - Property – Compliance Performance**

Measure	Target	Performance
Gas Safety Inspections (LGSR)  Applicable to 5,796 domestic properties	100%	99.97%  Year-end – 2 properties overdue Non-access being tackled

Carbon Monoxide (CO) Detector Installation	100%	99.71%
Applicable to 5,784 domestic properties (with gas supply and solid fuel)		Year-end – 16 properties requiring CO  Note – over 800 CO detectors have been installed during the year. Non-access for the small number of remaining properties is being tackled.
Electrical Safety Inspections	100%	90.09%
Applicable to 6,467 domestic properties  5-year inspection cycle		The programme was re-set in Nov 24 from a 10-year inspection cycle to a 5-year cycle, thus impacting performance. Progress from Nov 23 continues to be made improving from 81.76% to over 90%.  Additional contractor resources via Qualis have been sourced. At present (June 24) 656 properties are overdue their inspection. Non-access continues to be tackled.
Asbestos Reinspection's	100%	100%
Water Hygiene Risk Assessments	100%	100%
Lift Inspections (LOLER)	100%	100%
Fire Risk Assessments	100%	100%

### 3. Tenant Satisfaction Measures

There are specific criteria in place for the TSMs survey to be carried out to ensure integrity and accuracy of data. EFDC commissioned Acuity, a specialist market research company, to undertake independent satisfaction surveys with our tenants to collect data on their opinions of, and attitudes towards, their landlord and the services provided. Acuity have also worked with EFDC in previous tenant surveys in 2020, and so are familiar with EFDC.

Social housing providers are required to survey at least 9% of their tenants and EFDC. EFDC have set a target to survey aims approximately 1,100 tenants. Residents took part across two waves of surveys predominantly completed by telephone for the best possible feedback and completion rates. In total, 1,148 households participated in the surveys. This provided extensive information on our services and what is important to our residents. The themes for the TSMs are as in Table 3 below.

**Table 3 – TSMs Themes and Measures**

<b>Theme</b>	<b>Measure</b>
<b>Overall</b>	<ul style="list-style-type: none"> <li>• <u>Overall Satisfaction</u></li> </ul>
<b>Keeping Properties in Good Repair</b>	<ul style="list-style-type: none"> <li>• Homes that do not meet the Decent Homes Standard</li> <li>• Repairs completed within target timescale</li> <li>• <u>Satisfaction with Repairs</u></li> <li>• <u>Satisfaction with time taken to complete the most recent repair</u></li> <li>• <u>Satisfaction that the home is well maintained</u></li> </ul>
<b>Maintaining Building Safety</b>	<ul style="list-style-type: none"> <li>• Gas Safety Checks</li> <li>• Fire Safety Checks</li> <li>• Asbestos Safety Checks</li> <li>• Water Safety Checks</li> <li>• Lift Safety Checks</li> <li>• <u>Satisfaction that the home is safe</u></li> </ul>
<b>Effective Handling of Complaints</b>	<ul style="list-style-type: none"> <li>• Complaints relative to the size of the landlord</li> <li>• Complaints responded to within complaint handling timescales</li> <li>• <u>Satisfaction with the landlords approach to handling complaints</u></li> </ul>
<b>Respectful &amp; Helpful Engagement</b>	<ul style="list-style-type: none"> <li>• <u>Satisfaction that the landlord listens to tenants views and acts on them</u></li> <li>• <u>Satisfaction that the landlord keeps tenants informed about things that matter to them</u></li> <li>• <u>Agreement that the landlord treats tenants fairly and with respect</u></li> </ul>
<b>Responsible Neighbourhood Management</b>	<ul style="list-style-type: none"> <li>• ASB cases relative to the size of the landlord</li> <li>• <u>Satisfaction that the landlord keeps communal areas clean and well maintained</u></li> <li>• <u>Satisfaction that the landlord makes a positive contribution to neighbourhoods</u></li> <li>• <u>Satisfaction with the landlords approach to handling ASB</u></li> </ul>



A summary of the TSMs outcomes is summarised in Table 4 below. The headline position for the TSMs is an **Overall Satisfaction of 75%** for EFDC. This means that of those people surveyed, three out of four tenants are satisfied with the overall service.

This is the first time a survey of this type and nature has been carried out and, as a sector, we are yet to understand how satisfaction levels have played out across the sector. There is a broad view across the sector of satisfaction levels reducing. Having spoken informally to other authorities, we believe our outcome is a good outcome for EFDC however, we do note there is further work to be done to improve our work with residents and our position.

Through the survey process, we gathered a rich source of feedback and over 1000 comments. The top three areas raised in comments relate to: Day to Day Repairs - time taken (7%), Day to Day Repairs – outstanding/forgotten, and Council, other services – Road repairs (4%). Teams have been working through the comments and contacting residents where contact details had been provided. The outcomes of the survey have also been shared with Qualis and information is being used to inform services.

A summary of the outcomes of the survey are as below in **Table 4**.

<b>Overall Satisfaction</b>	<b>75%</b>
<b>Home &amp; Communal Areas</b>	
Home that is well maintained	73%
Home that is safe	81%
Communal areas kept clean and well maintained	61%
<b>Repairs Service</b>	
Overall satisfaction where repair carried out in last 12 months	74%
Time taken to complete most recent repair	67%
Way EFDC deals with repairs and maintenance	69%
<b>Neighbourhood</b>	
EFDC makes positive contribution to neighbourhood	67%
EFDC approach to handling anti-social behaviour	61%
<b>Communications and Tenant Engagement</b>	
EFDC listens to view and acts upon them	59%
Kept informed about things that matter to them	74%
Treated fairly and with respect	78%
Easy to deal with	71%
Satisfied with complaints handling where complaint made last 12 months	36%

In addition to the outcome as in the table above, we took the opportunity to ask residents some additional questions about wellbeing. Headlines from these responses demonstrated that:

- 7% of residents said they were currently struggling to pay their rent and service charges.
- 23% were struggling with meeting the costs of household bills.
- 26% were having difficulties with utility/fuel bills.

In relation to their property, 73% of households were satisfied with the energy efficiency of their home and, 30% said they had issues of damp and mould with 72% saying they have reported the issue to EFDC.

We are digesting the results and comments from residents and in the process of action planning with a view to improving satisfaction levels. Some areas are lower than we had envisaged, particularly around listening & acting on views and, complaints handling.

Finally, the survey also provided EFDC with a 'Net Promoter Score', this is in relation to how likely residents were to recommend EFDC to other people, the outcome for this was a +5. This is considered to be a positive position where residents are likely to recommend EFDC to others.

#### **4. Tenant & Leaseholder Panel**

Feedback has been obtained from the T&L Panel during a meeting on 12<sup>th</sup> June.

In relation to KPIs - the Panel wished to see a broader range of performance data and context in relation to trends. The information in this version of the report has been expanded to take account of the views of the Panel.

In relation to TSMs – the panel noted the content of a 'tenant friendly' version of the TSM report produced by Acuity for EFDC. The Panel noted this was the first time this type of survey had been conducted and were keen to understand how areas of lower performance would be improved. The panel noted the outcomes were due to be reported to the Regulator for Social Housing later in June.

#### **5. Resource implications:**

There are no additional resource requirements within the scope of this report.

**6. Legal and Governance Implications, Relevant Statutory Powers:** None

**7. Corporate Plan Implications:**

Management of performance meets the requirements of the Corporate Plan and the Housing Strategy.

Management of performance meets the requirements of the Corporate Plan and the Housing Strategy.

**8. Background Papers:** None

**9. Risk Management:** N/A

**10. Equality:** N/A

**11. Key Decision:** (if required): None.



Quality...It's what we stand for

# 2023/24 (6 months) Year End Performance & Business Update

# Agenda

1. Achievements
2. Challenges
3. End of Year Performance 2023/24 (6 Months)  
Business Plan & Next 12 Months



# Key Achievements



- **Launched the Community Benefit Fund**, supporting 4 projects / schemes
- **Funded and launched Handyperson & Qualis Garden Care**, as of the 1<sup>st</sup> April 2024, funded through our surpluses.
- **Customer Feedback**- initially 1,000 repairs with no appointments down to 350 all with appointments booked in June and July, reducing wait times.
- **Carbon Audit**, clear baseline and partnership with EFDC.
- **Materials**- New relationship with Travis Perkins procured, going live 1<sup>st</sup> July 2024.
- **Grounds Maintenance**- improvement plan completed and 10% increase in customer satisfaction over the period.

Page 54

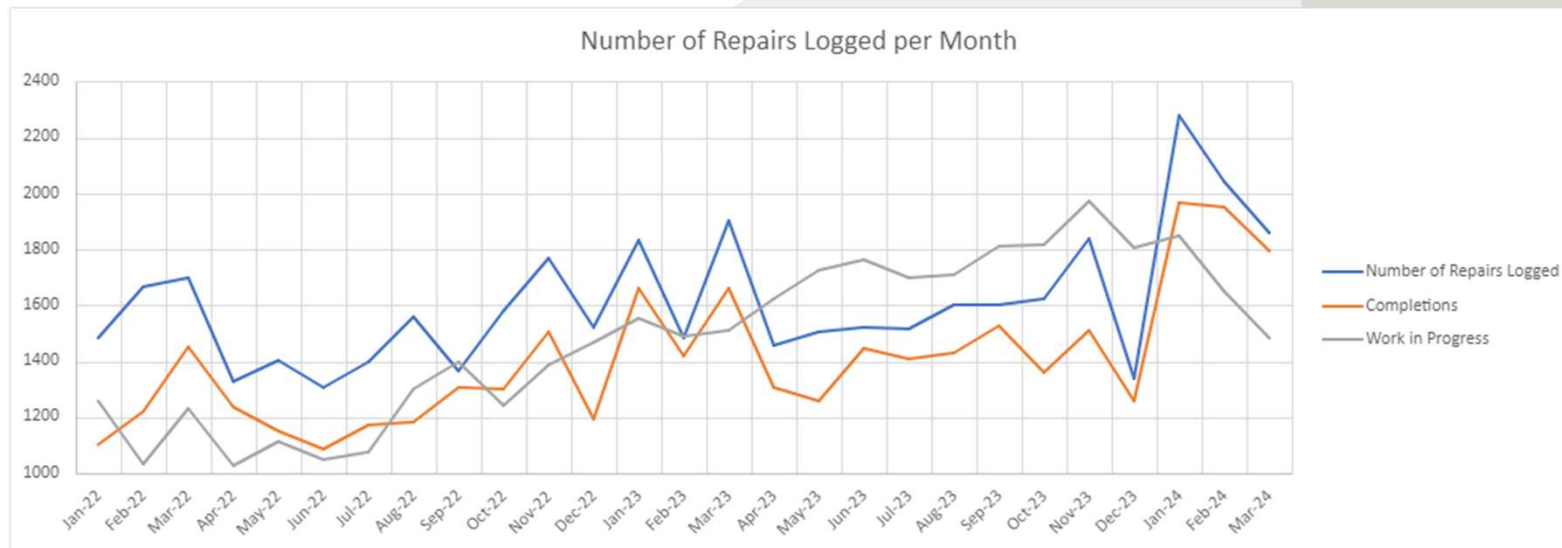


# Key Challenges

## Key Challenges Over the Period:

- Materials suppliers performance
- Speed of non urgent repairs
- Skills and Recruitment / Retention

Higher demand for repairs



## 2023/24 Performance (6 months)

Measure	2022/23 Year End	2023/24 (6 mths) Target	BP Target 2024-28 (4 Years)	Q1	Q2	End of Year 2023/24	Trend
Customer Satisfaction- (Maintenance)	92%	92%	94%	93%	95%	94%	▲
Customer Satisfaction- (GM)	42%	50%	75%	47%	52%	50%	▲
Customer Contact Centre- Average Answer time	6.15 mins	4 mins	2 mins	1.45 mins	1.30 Mins	1.37 Mins	▲
Repairs-First Time Fix	85%	85%	88%	87%	83%	85%	▼
Repairs- Completions on time	84%	90%	95%	85%	83%	84%	▼
Voids- Returned in Target	67%	90%	95%	99%	100%	99%	▲
Voids- Average turnaround time (days)	29 days	27 days	22 days	29 days	20.1 Days	24.9 Days	▲
PM- Programme Delivered on Budget	95%	95%	99%	91%	100%	100%	▲
GM- Achieved the Contract Standard (B)	53%	65%	95%	100%	100%	100%	=
Electrical Testing- Compliance (5 year)	79%	100%	100%	86%	90%	90%	▲
Gas Annual Servicing- Compliance	99.9%	100%	100%	99.85%	99.97%	99.97%	▲



# Complaints and Compliments (6 Months)

- Complaints

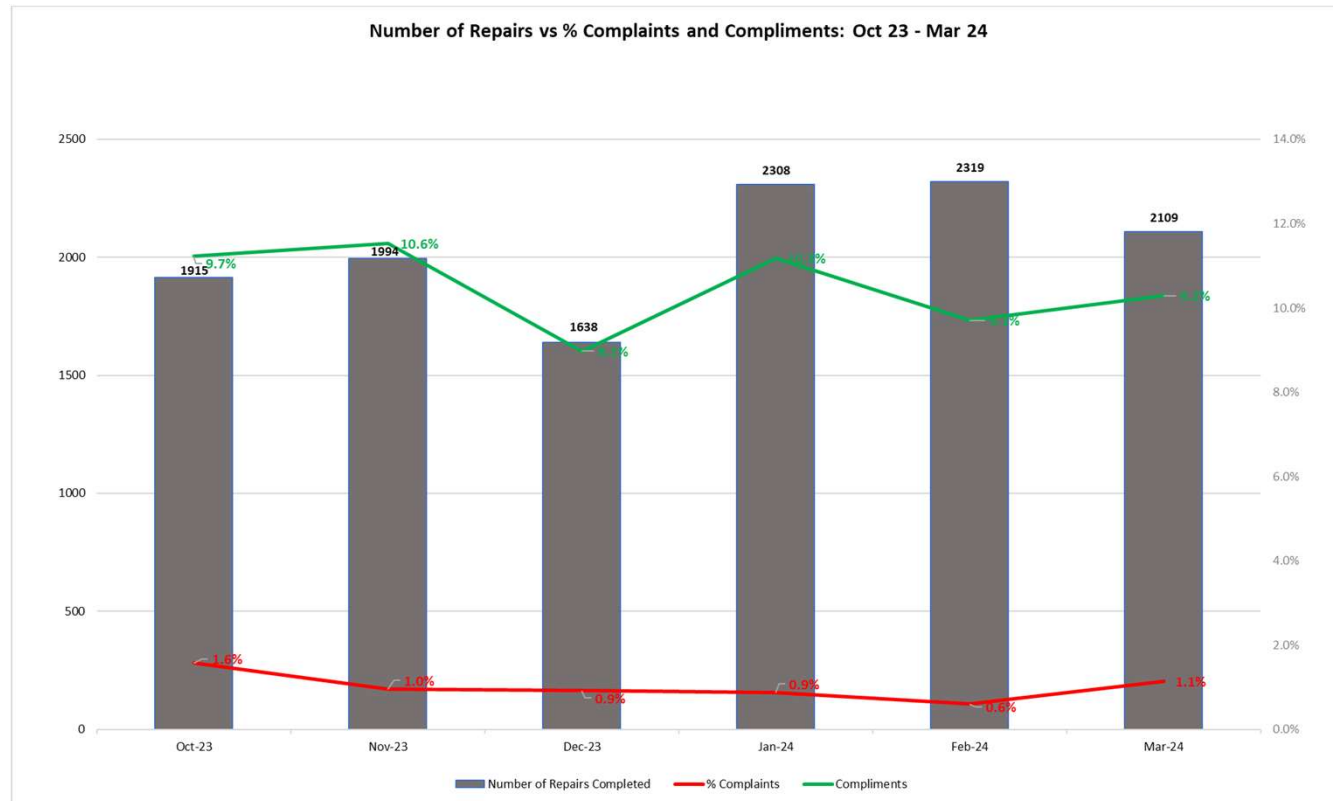
- Formal 75
- Informal 47
- Total = 122

Page 57

### Complaints relate to

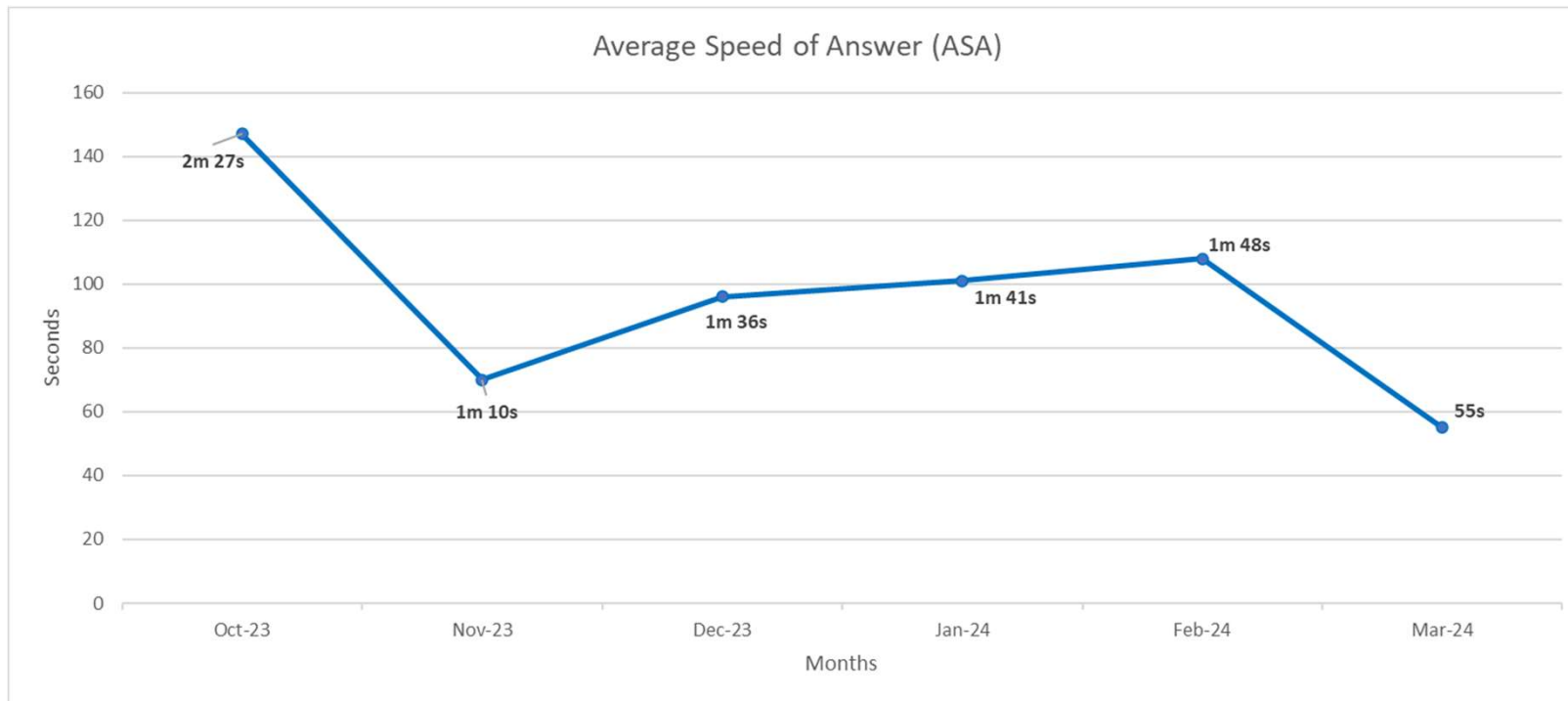
- Length of time to complete repairs
- Material supply issues

- Compliments = 1170



# Customer Contact Centre- Call Handling

Average speed of answer by month



# Business Plan & Next 12 Months

**Over the course of the 4-year Business Plan, Qualis Property Solutions will deliver the following six corporate objectives outlined below:**

- Enhance the customer experience
  - Customer Culture Strategy
  - My Qualis (delayed to autumn)
  - Exploring Artificial Intelligence.
- Increase community investment
  - Embed and demonstrate social value (CBF)
  - Apprenticeships
  - Volunteering scheme
- Continue to develop a great place to work.
  - Cultural transformation linked to our values
  - Training and development plan
  - Clear staff feedback (pulse surveys)



# Business Plan & Next 12 Months

**Over the course of the 4-year Business Plan, Qualis Property Solutions will deliver the following six corporate objectives outlined below:**

- Remain financially strong and grow the business.
  - Supporting the council
  - External business
- Enhance our partnerships
  - Successfully mobilise new Travis Perkins Contract
  - Education providers
- Continue to decarbonise our business.
  - Fleet
  - Carbon Strategy

