

Local Energy Advice Demonstrator (LEAD)

National Conference Report

1 April 2025 at The Bond, Birmingham

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About LEAD

LEAD was established to test new and innovative approaches to providing in-person energy efficiency and clean heating advice to households in England at a local level. Up to £20 million in grant funding was made available, resulting in 35 projects being delivered within the period August 2023 to March 2025. Projects focused on a) audiences most likely to benefit from in-person advice, such as offline and hard-to-reach consumers, and b) homes that are harder to retrofit, such as traditional and listed buildings, and homes in conservation areas. The projects were funded by the Department for Energy Security and Net Zero (DESNZ) and funding was delivered in partnership with the five regional Local Net Zero Hubs.

About the LEAD National Conference



The purpose of this event was to bring together LEAD project partners with the Local Net Zero Hubs and DESNZ to share experiences and knowledge as projects drew to a close. A full list of projects and attendee organisations is provided at the end of the report. All five Local Net Zero Hubs worked together to facilitate and deliver the event, with South West Net Zero Hub taking a lead on planning and reporting.

The purpose of this report is to share learning. This event write-up cuts across the

15 sessions to summarise useful insights under 11 key themes. This approach is intended to combine findings across the whole event in a digestible form, rather than reporting on each session in isolation. Information recorded here reflects conversations held on the day, and is not intended to express the Hub's opinion, nor the opinion of DESNZ.

Links provided relate to points arising in discussions. Where captured in session notes, some specific examples from LEAD projects are provided; this does not reflect the value or relevance of projects that were not used as examples.

The report is not a comprehensive record of what the projects are doing or have achieved. It reflects *event discussions*, guided by topics primarily suggested by attendees.

We hope you find it useful!

Discussion topics

The event primarily focused on 15 topic-based discussions, using the [World Café](#) (aka Open Space) method to select and facilitate topics. Session 1 topics were pre-selected by the Hubs and DESNZ. Other topics were suggested by attendees on the day, and were voted for discussion in Sessions 2 and 3.



Session 1

- Have you integrated with digital services or apps? How did this work on your project?
- Did you create a network of engaged suppliers? Were there any blockers to engaging with them?
- How did you overcome the barriers of reaching hard-to-reach groups?
- What self-funding options have you explored? What are the barriers or issues?
- Have you engaged with installers through PAS/Trustmark or MCS? What barriers have you had with engagement or have there been delays due to PAS updates?

Session 2

- What is the legacy for LEAD? What are the next steps?
- How will you continue support after install? Is there a chargeable model?
- Successful landlord engagement
- How are you going to continue your project with learning from LEAD post-closure?
- What fundamentally failed in your strategies?

Session 3

- What is the value of energy efficiency advice? Who is it valuable to?
- How can we teach more people about retrofitting traditional buildings?
- Different retrofit assessment methods
- What are the triggers to retrofit? How do you market to them?
- Should we have a centralised database of retrofit assessments?

Emerging themes

[Theme 1: Reaching target audiences](#)

[Theme 2: Tailoring messages](#)

[Theme 3: Overcoming barriers](#)

[Theme 4: Working with installers](#)

[Theme 5: Digital tools and assessments](#)

[Theme 6: Data sharing](#)

[Theme 7: Retrofitting rental homes](#)

[Theme 8: Retrofitting older homes](#)

[Theme 9: Alternative funding models](#)

[Theme 10: Project management](#)

[Theme 11: Fund and funding challenges](#)

Theme 1: Reaching target audiences

Key points made by attendees:

Getting started

- Define your target audience carefully. If targeting a geographical area, ensure you understand who lives there.
- Community energy organisations can use their status as non-profit and impartial to encourage trust and focus on empowering people to take action.
- It is hard to tell which activities are most cost effective, and success is likely a cumulative effect of messaging across different channels over time.

Triggers for retrofit

- Triggers for retrofit include house purchase or renovation, health issues, rising bills, boiler break-down, neighbours having works done, or environmental concerns.
- Advice needs to be delivered in advance of crisis purchases such as a boiler breakdown, otherwise people are not physically or mentally prepared to switch to alternative solutions.
- House flippers – those who buy affordable housing to renovate and sell at a profit – are sometimes an overlooked audience for retrofit.

Networks and referrals

- New audiences can be reached by working in partnership (formally or

informally) with multi-agency networks and others already embedded in communities: social enterprises, local charities, health services, environmental groups and faith-based groups. Make sure you're well known by these groups locally.

- Local partners may already have contacts, trust, local knowledge and translators in place. Give information and training on energy advice to partners who aren't energy experts.
- Referrals can be arranged from Citizens Advice, Age UK, local authorities and local health services.
- Tradespeople (such as plumbers and electricians) go into many houses and often have rapport with householders. They can be effective messengers and reach new audiences if willing to engage with energy projects, although most will need training as retrofit knowledge is usually limited.
- Referrals from the health service are important for reaching people who need help. Several LEAD project partners used links to hospitals and GPs for referrals; other projects outside LEAD (e.g. Centre for Sustainable Energy, Severn Wye) have tried 'warmth on prescription' with GPs.
- Faith and interfaith groups can be a useful community to tap into.

- Within the Church of England, vicars and their families often live in big old buildings with little income and access to a lot of the community; they can be effective champions, particularly if they have first-hand experience of help.
- Friday prayers at mosques are a great access point to reach Muslim audiences, especially if you can engage trusted local faith leaders to spread messages. Ramadan is a good time to engage Muslim audiences, who can be more receptive during this period.
- One LEAD project had links to the voucher system for fuel. Households who repeatedly received emergency help with fuel bills were referred for energy advice and support.

Marketing channels

- Use multiple engagement channels, especially trusted sources such as local authority communications.
- Mailouts are effective, but can be expensive unless you integrate them with an existing mailing such as council tax bills (which can be surprisingly cheap).
- One LEAD project found that a mailout was so successful that it generated a large flurry of phone calls, which caused handling capacity issues.
- Social media can be effective in reaching various audiences. Private Facebook groups can be useful, even if interaction is uneven.
- In person and phone contact are essential for people who are offline.

- Many people will pick up a call from a local number but not from a mobile.
- Some projects found QR codes helpful (e.g. on tear-off poster strips, beer mats, fridge magnet thermometers, printed banners or mailouts from trusted sources). Others questioned their use on posters or other outdoor advertising that could be tampered with, and noted that many audiences can't or won't engage with them.
- Videos can aid engagement, including in other languages.

Community outreach

- Piggybacking other community events works; think about events your target audience might attend. Ideas: clothes swaps, Christmas lights switch-on, football matches, churches, exercise classes, job seeker events, summer fun days, and adult literacy courses.
- Locations for advice outreach can include community buildings, places where other services are delivered (e.g. GP surgeries), or a mobile advice van.
- Engagement in workplaces helps to reach 9-5 office workers, who are often hard to engage. It's most effective when you have someone championing your offer, especially if they can provide a captive audience (e.g. team meeting or lunchtime talk). Employers can also support retrofit by being flexible for workers needing to be home for surveys or works, though you may need to plan for Saturday assessments.

- Volunteer ‘energy champions’ are a great way to promote retrofit via trusted messengers to a range of audiences, and can help install basic measures.
- Climate awareness and activism groups are a good way to access highly motivated able-to-pay audiences with advice and services.
- Schools and youth groups can provide opportunities to reach families through their children, especially if children can get involved (e.g. through simple DIY home energy surveys).
- Community events can take a ‘Not Yet Green Open Homes’ approach – similar to the well-established Green Open Homes method, but showcasing ‘normal’ homes (e.g. with damp/mould) to point out action that can be taken.

Working with vulnerable people

- Working effectively with vulnerable people requires a thoughtful and respectful approach.
- Letting a stranger into your house is very hard for some people – trust matters.
- Ofgem and some DNOs can help people access support to tackle energy debt, and the Household Support Fund can help with essential energy costs.
- Direct email can be a good communications channel for people in vulnerable situations.
- Flash cards can help communicate with people who do not speak English well.

Links

[Warm Home Prescription](#)

[Electricity North West’s Take Charge advice scheme](#)

[Household Support Fund](#)

[Green Open Homes | Not Yet Green Open Homes](#)

[Sherlock Homes energy surveys for young people](#)

SPOTLIGHT ON...

DLEADP: The project successfully used DIY trigger points by working with B&Q to run in-store advice stalls alongside discounts in energy products. Council tax mailouts were also used.

Rossendale Valley LEAD:

Advice and the Fairer Warmth app were promoted through pop-ups in health centres and GP and hospital waiting rooms, with GPs helping to reach people by text. This built trust and recognition.

Hilary School Sustainable

Education Programme: This project worked with schools and attended parents’ evenings to promote grants. Referrals were also made to the Household Support Fund to change broken boilers.

West of England LEAD:

Advice was combined with clothes swap event, ensuring people walked past advice stalls to reach the clothes rails. This project also ran ‘Not Yet Green Open Homes’ and created a ‘Sherlock Homes’ survey with scouts.

Birmingham Voluntary

Service LEAD: Advice packs with small free items (e.g. light bulbs) were very popular with householders.

Theme 2: Tailoring messages for target audiences

Key points made by attendees:

Segmentation

- Language and messages need to adapt to address the motivations and needs of different audiences. Tailored advice results in better outcomes.
- Market or desk-based research is likely needed before you begin. There are many data sources and existing segmentation approaches out there.

Language

- Avoid relying on 'green' or 'eco' channels and messaging.
- Money savings, health improvements and comfort are all great motivators.
- Tests with social media posts show that money savings campaigns get a lot more clicks than green agenda ones.
- Common retrofit terms, including "retrofit" itself, are often not understood by the general public. "Home improvements" is a useful alternative term.
- Try to frame retrofit as part of normal home maintenance or improvement.
- Health and comfort messages are more successful than retrofit and carbon saving messages, and can work better than cost savings as a motivator for some audiences.
- If using carbon messages for some audiences, talk in terms of tangible

metrics (e.g. 'numbers of trees planted'), not tonnes of carbon.

- Season matters – consider switching to a "keep cool" message in warmer weather.

Education

- It's hard to dispel misconceptions, and requires both education and a trusted messenger.
- The public is poorly informed on heat loss. People focus on the roof and windows, with very poor understanding that walls are the main issue.
- Teach homeowners about the best times to introduce new measures while undertaking other works, e.g. draughtproofing windows during other redecorating work.

Advice content

- For some households, whole-house retrofit is not always the best option, and it's important to be open to the householder choosing incremental measures. Unfortunately, this does not always work well with funding KPIs or scheme designs.
- Smaller, incremental measures can build trust towards more ambitious measures. Some audiences may find these easier to cope with, as they may have a lot to deal with in other areas of their lives.

- The 'missing middle' (those ineligible for certain grants but unable to pay in practice) can also benefit from incremental measures, including behavioural advice, as they cannot afford full house retrofit.
- Advice needs to be appropriate to the house condition and householder circumstances. For example, heat pumps are not always the best option and can leave households with higher bills.
- Some audiences will want advice and workshops to support a DIY approach, particularly in the 'missing middle'.
- Some audiences are interested in having a list of recommended installers for quality and trust.
- Some households, particularly in rural areas, will not want to remove solid fuel stoves as this could undermine their resilience to power outages (still a significant problem in winter in some areas) or make it hard to get traditional buildings warm in very cold weather.
- Available tariffs will influence advice around batteries and solar PV.
- People who are offline are often still interested in the digital interface, and some will use it themselves once it's been introduced to them.



Links

[Far South West Consortium's LEAD Market Segmentation Report and Messaging Toolkit](#)

Theme 3: Overcoming barriers in the customer journey

Key points made by attendees:

- Promoting easy energy actions can help people get started. For some people, this is a necessary first step before thinking about deeper retrofit.
- If a previous local scheme has been run poorly, it can be difficult to build trust to establish a new one.
- Free survey offers are often requested speculatively. One solution is to charge for assessments, but refund this via a discount on measures if works go ahead.
- Planning permission can be an additional barrier for self-funded audiences, e.g. in traditional buildings (see Theme 8).
- Consider support to overcome small barriers. Some households need help with maintenance or to prepare for installations (e.g. gutter or loft clearance). Collaboration with Care & Repair and Timebanking have both worked to provide this extra support.
- Households may need help throughout assessments, grant applications and installer communication.
- Most households aren't aware of PAS or Trustmark. Community energy groups are well-placed to support education around these quality standards.
- The University of Surrey delivered a useful 2022-23 study on reasons for household retrofit drop-outs.
- For self-funded audiences, consider loan options or a sliding scale of fees to overcome cost barriers.
- Sometimes people who don't own smartphones are set up with systems that require smartphones.
- Grid constraints can affect retrofit installations of renewable energy.

SPOTLIGHT ON...

Bath and West Community Energy: Beyond LEAD, time banking has been successfully used to secure help with pre-installation preparation (e.g. loft clearance). BWCE is also trialling 'home energy neighbourhoods', assessing several houses at once. It is unknown whether this will be more or less efficient (easier geography, but more coordination). Assessments are followed by a 'housewarming party' to discuss results and bulk buy support for measures.

QUESTIONS

Could the interest on a loan option for self-funded households be used to fund aftercare for grant-funded installs?

Links

[University of Surrey \(2023\): Understanding the leaky pipeline of energy-saving home improvements](#)
[Care and Repair England](#)
[Timebanking UK](#)

Theme 4: Working with installers and other suppliers

Key points made by attendees:

Getting installers in place

- Projects had different experiences getting installers for different schemes.
- Installers generally prefer grant-funded work to self-funded work.
- There is a competitive market for easy ECO leads, but significant issues with installers not pursuing harder or less profitable work. When installers pull out of a job, it disrupts the customer journey and undermines trust in the scheme, which is hard to repair.
- The Grenfell disaster highlighted issues with flat retrofits, and these projects need Trustmark-accredited installers. However, finding suitable installers for flats is challenging.
- Cheaper suppliers often deliver lower quality when installing more challenging measures.

Contracts

- Make sure you have effective contracts in place. Project managers must have the skill and confidence to hold contractors to agreed standards.
- Dynamic Purchasing Systems can be very suitable, as they allow new installers to join during delivery.
- Installers often want their own relationship with households, and some are very good at providing

bespoke support. Contracts may need flexibility to support those who want to go the extra mile.

- Make due diligence checklists as short and easy as possible for suppliers, based on what they would actually be doing. This may mean different checklists for different jobs.
- Providing an induction/training for suppliers joining the scheme is helpful.

Marketing with installers

- Some installers are keen to do their own marketing for the project, and others don't even have a CRM. It's useful to set expectations early on.
- Monthly workshops and events for the able-to-pay market were discussed, where a small network of experienced and willing installers would offer opportunities for households to talk informally to an expert.

Working with retrofit assessors

- Retrofit assessors have diverse approaches and results can be subjective. Mystery shopping through LEAD has found different results from different assessors.
- Householders need clear messages on whether they will be charged for the retrofit assessments.

- Retrofit assessment cost criteria varied across suppliers. Some offer a set price, others by the number of rooms.
- Retrofit assessments are not always accurate, and often do not capture when an item is not working properly (e.g. windows).

Secondary works

- There are issues with funding installers to deliver intermediate measures, such as repairing windows/doors/radiators, installing thermostatic radiator valves (TRVs) and chimney sweeping. Most of these don't come under Trustmark.
- Trading Standards 'Buy with Confidence' can cover these other actions, but many small suppliers already have enough work and don't need or want to jump through these additional hoops.

Post-installation quality assurance

- Quality issues sometimes arise with suppliers. Someone independent to the installer should revisit homes to check what the installers have actually done.
- Contractors are often very resistant to coming back to rectify issues if they aren't local. Localised supply chains help with post-installation support.
- Community energy organisations can lack the authority to get poorly performing installers in line. Mechanisms for accountability need careful consideration in scheme design.
- Self-funded households are often more able to challenge installers on poor work. Grant-funded installations are more likely to need advocacy support when things go wrong.
- Trading Standards' local trading schemes are easy for installers to join, but allow households to publicly review their installer experiences.
- Warranties on products are not always fit for purpose.

SPOTLIGHT ON...

Hilary School Sustainable Education Programme:

Residents were given a list of approved installers. This has worked well in building trust and supporting uptake.

DLEADP: Contractors were onboarded and treated as part of the team, with the Retrofit Pattern Book used to effectively support training. Scheme applications are sent to a predetermined local installer for that area via a framework of installers. This approach is challenging and time-consuming to manage, but the localisation brings benefits.

Links

[Wigan – Good Trader Scheme](#)

[Dynamic Purchasing Systems](#)

[Retrofit Pattern Book](#)

Theme 5: Digital tools and retrofit assessments

Key points made by attendees:

- A wide range of digital tools and retrofit assessment measures were used across LEAD, and there is a lot of learning to be shared between regions and projects.
- Self-funded and grant-funded retrofit journeys are very different processes to manage, and digital solutions need to take this into account.

Digital platforms

- Digital solutions included in-house, bespoke and off-the-shelf private sector products. Each has pros and cons, and choosing the most appropriate tools and apps depends on the scheme's target audience.
- Many different digital providers have come and gone in this space as the market changes.
- Most apps focus on the customer journey and household interaction with advice and installation.
- Often, backroom services provided by apps are useful, but the interface is not always well-designed.
- CRMs and other digital tools need to provide case management support and communications tools, ideally via multiple channels (email, text, etc.).
- Fairer Warmth was used by many LEAD projects and can support lead generation and case management. Others included Thermafy and Kestrix.
- Some LEAD projects worked with other organisations on the digital offer, e.g. with developers to improve app design.
- Problems were encountered when CRMs lacked flexibility to account for emerging needs (e.g. households not following all of the steps in the retrofit process as anticipated).
- Data management issues arose when portals weren't ready in time for scheme launch, and when app developers couldn't keep up with alterations needed during delivery.
- Several projects stressed the importance of personal advice alongside any digital tools to aid uptake, reduce drop-out rates and improve householder experiences. Home visits are often needed as a follow-up, and some people need in-person help with online forms.

Retrofit assessments

- Many LEAD projects offered 'deep' and 'light' retrofit assessments. Each has a role to play, and there is a trade-off between cost and quality.
- 'Deep' assessments are more appropriate for whole house refurbishments. People Powered Retrofit's Whole House Planner was mentioned as a pricy but effective.

- ‘Deep’ assessments are more appropriate for whole house refurbishment. People Powered Retrofit's Whole House Planner was thought costly but good.
- ‘Light’ assessments were sometimes used for self-funded audiences as they could be delivered at an accessible price (usually still subsidised), with two projects mentioning Parity Projects’ CROHM software as a basis (which uses EPC data). Some LEAD projects used a ‘light’ format to deliver less technical, more personalised advice reflecting circumstances.
- Heat loss diagnostics, using air tightness testing and smoke pens, are a useful addition to assessments.
- Thermal cameras are not that useful for technical assessment, but are brilliant for engagement, motivation and spotting heating system issues.
- A range of tools were used to assess heat pump specifications. Undertaking Heat Geek’s ‘Mastery’ course means that other installers are more likely to be willing to work with your assessments. Heatpunk and Spruce software were also mentioned.
- Requests have been received for assessments combining solar, batteries and electric vehicle charging. There is an aspiration to create some shareable resources on this in future.
- Some LEAD projects used EPCs to support engagement and show retrofit impact. Others raised concerns around EPC limitations and inaccuracies.
- Home assessments combining retrofit and heritage conservation advice are very useful for listed buildings (see Theme 8).

Links

[Fairer Warmth](#) | [Parity Projects](#) | [Jotform](#) | [Kestrix](#)
[Thermafy](#) | [Heat Geek](#) | [Heat Punk](#) | [Spruce](#)
[People Powered Retrofit’s Home Retrofit Planner](#)
[Home Energy Efficiency Plans \(Retrofit West\)](#)

SPOTLIGHT ON...

Rossendale Valley LEAD:

Rossendale Valley Energy has been working with the Fairer Warmth app developers to give feedback on practical use of the tool, which has significantly improved the app’s functionality.

Surrey Consortium: Energy Champions used Jotform to help with data collection and management. Functionality is limited, but was sufficient for the job.

HERO Project: The Home Energy Retrofit Options (HERO) Plan provided a light touch assessment tailored to household needs, and was cheaper and easier to digest than a full assessment.

Futureproof Wiltshire: Heat loss diagnostics were trialled through LEAD. This approach enhanced advice and was motivating for homeowners. However, it added to delivery costs, and CSE is considering whether to keep this as a tag-on service or to integrate it as part of its ongoing core service.

Theme 6: Data sharing

This theme was prompted by discussion of the pros and cons of creating a centralised national retrofit database.

Key points made by attendees:

- PAS and MCS data is already available, but not centrally.
- There is precedent for a centralised database approach, through the EPC database (which could form the basis for a more comprehensive retrofit database) and DVLA records.
- A centralised database could provide a repair, assessment and measures history for homes, like an MOT history.
- Some data fields could be mandatory, others voluntary.
- GDPR and access rights would need to be carefully considered.
- It was unclear who would be responsible for such a database, but potential for monopolisation and exploitation must be considered.
- There was debate around who would be responsible for uploading data (e.g. installers or householders), and whether it would need incentives (e.g. required to access grants, check eligibility or renew EPCs).
- It would be important not to penalise households who can't upload information online.
- Householders often don't retain the paperwork to prove what measures were installed. They might like the option to self-upload data to ensure this evidence is recorded and not lost for future reference (e.g. house sale, or as evidence if a dispute arises).
- Installers could be responsible for uploading data on works and linking this to building regulations.
- It's easier to make sure paperwork is in place for government grant schemes, as the onus can be put on installers.
- EPCs won't assume measures exist unless the paperwork exists. Records could be linked to the EPC process, with assessors verifying works.
- Such a database could be trialled on a voluntary basis, with social landlords or through grant schemes.
- Being able to overlay retrofit data with other data (e.g. local census or GP data) could be invaluable to inform future grant schemes and policy.

Links

[EPC Open Data](#)

Theme 7: Retrofitting rental properties

Key points made by attendees:

- Tenants are rarely able to instigate retrofit, so landlords must be the primary focus.
- Landlords often respond best to self-interest messages (attracting tenants, property value).
- Tax incentives for landlords support maintenance but not capital improvements such as retrofit.
- There are financial incentive issues with high upfront costs and poor payback. If tenants are eligible for grants (ECO4), this can help.
- There can be an ethical dilemma when landlords take advantage of improvements to raise rents, effectively evicting tenants who cannot afford rent rises.
- Delays in 2023 to MEES changes dampened landlord interest, but this is picking up following new announcements. Anecdotally, about 40% of landlords are considering selling up due to MEES.
- Legal loopholes include the 'Consent' clause in MEES, which gives landlords a five-year reprieve if tenants don't want measures installed.
- Local landlord licencing may be a route to embed energy standards in rental properties.
- Landlords are very diverse, and must be segmented for effective targeting. Larger landlords are often based abroad, while smaller landlords may have closer relationships and rapport with tenants.
- Leaseholds – where homeowners have a freehold landlord – add complexity, as more parties are involved. These are especially common in London, and often affect flats. Note that law reforms are coming around common ownership and leaseholds.
- Social housing landlords have access to different funding streams, which can affect engagement.

SPOTLIGHT ON...

Severn Wye LEAD: Facebook and Google Ads effectively reached landlords. Various headlines and photos were tested, with data collected on clicks from people identifying as landlords. Findings helped target metadata groups with similar profiles.

Repowering London: This group is starting to specialise in working with blocks of flats, e.g. housing cooperatives that own the freehold.

QUESTIONS

If tenants are empowered to instigate retrofit, how can we support quality installation?

Is there a gap in support for student housing?

Should landlords educate tenants on energy efficiency?

Useful links

[MEES, upcoming changes and MEES 'Consent' exemption](#)

Landlord licensing standards: [Rent Smart Wales](#) and [Bristol City Council HMOs](#)

[Leasehold and Freehold Reform Act 2024](#)

Theme 8: Retrofitting traditional buildings

Key points made by attendees:

- Traditional building retrofit is still a long way behind where it needs to be, and the sector still has knowledge gaps about what works best.
- Education is needed around air tightness and permeability in traditional buildings, to avoid retrofit causing damp issues (e.g. conventional paints create a waterproof barrier and can cause damp).
- We need to break down siloes in councils (heritage conservation, energy efficiency, home repairs). Better communication can help reduce conflicting agendas.
- Nationally, regulations and buildings standards still don't support traditional materials and techniques.
- In HUG and previous schemes, houses were retrofitted with the wrong type of insulation, which in some cases led to damp and structural damage.
- Guidance is often subject to interpretation, and heritage buildings guidance is loosely written, leading to inconsistent approaches to retrofit and planning.
- Traditional building skills are diminishing, but are needed for sympathetic retrofit and maintenance.
- New technologies aren't always suitable in older buildings. Heat pumps sometimes struggle to work effectively if there is significant heat loss.
- Cost is often prioritised over suitability of materials in traditional buildings (e.g. windows), and households sometimes struggle to access appropriate materials.
- While secondary glazing is often recommended for listed buildings, it is not as effective as double-glazed windows.
- Some LEAD projects have had good outcomes with external wall insulation.

SPOTLIGHT ON...

Green Heritage Homes:

Based in the World Heritage Site city of Bath, this project has been trialling innovative approaches to listed building retrofit advice. A key innovation was the introduction of a 'Level 0' pre-application planning advice service, where a council Conservation Officer trained in energy advice was able to advise householders on feasible retrofit options in listed buildings that would be likely to gain Listed Building Consent through a home visit.

QUESTIONS

Could DESNZ provide a map of missing skills (heritage, PAS)? Which regions are experiencing issues (or not)?

Links

[Green Heritage Homes](#)

[Historic England Advice Note \(HEAN\) 18: Adapting Historic Buildings for Energy and Carbon Efficiency](#)

Theme 9: Alternative funding models

Key points made by attendees:

- There were a range of different opinions around how best to mobilise government spending.
- Most projects found that self-funded households are typically willing to pay £120-150 for a retrofit assessment, but actual costs are more like £350-800+, so the rest needed subsidising.
- Some projects have been able to subsidise assessments with support from local authority budgets or the Energy Redress Scheme.
- Light touch surveys for self-funded households can still provide a lot of value, but at lower cost. Other support could be modularised, such as thermal imaging and smoke testing.
- Some advice organisations do not feel able to charge in any circumstances, as their core principle is free advice.
- Some have increased fees for other services to support the advice team.
- A lot of other agendas benefit from retrofit advice – including householders, installers, the health sector, other advice service agendas, local economies (and therefore councils), and (sometimes) energy companies. It may be possible to better monetise these connections to fund energy advice.
- Organisations were keen to link retrofit to better health outcomes (strokes, asthma), but feel there is a lack of knowledge about how well this can be quantified, and whether health funding would be made available if a strong preventative case was made.
- There was also interest in quantifying and linking to other strategic agendas at council level such as adult social care, housing stock quality and economic development, but uncertainty about how to engage, measure and track progress.
- Job creation may be hard to measure, as these may be short-term, and training needs are constantly evolving as government policy changes.
- Installers make a reasonable income from installations, but they make even more from rectifying bad installations by others.
- Referral fees from installers have helped complement LEAD grant income to run projects, as it saves installers marketing costs. One project cited a £1,500 referral fee.
- Energy companies often want free data and aren't prepared to pay for services.
- DNOs may have some interest, but their definition of community is by substation, not neighbourhood.

- Better availability of low or no interest loans could help consumers.
- Various lenders will support households with retrofit, such as the Ecology Building Society, Halifax and Lendology (which partners with councils on loans). Remortgaging is also an option, and the Green Finance Institute is currently investigating property-linked borrowing.
- While some councils have work successfully with Lendology, those with debt have struggled to start up a loan/finance product with them; the capital costs are too high and managing risk is an issue.
- Community renewables can help provide an income for advice services.

Links

[Lendology](#)

[Energy Redress Scheme](#)

[Green Finance Institute](#)



SPOTLIGHT ON...

DLEADP: Selling ‘deep’ assessments at full price proved difficult. Using CROHM software, it was possible to reduce the price to £350 and make a surplus.

Futureproof Wiltshire: The Retrofit West service at CSE is able to apply a discount voucher of 70% for self-funded retrofit thanks to a subsidy from the West of England Combined Authority.

QUESTIONS

How can capacity or support be found to help map the stakeholder objectives (e.g. councils, NESO, NHS) against retrofit outcomes?

Can we better quantify the benefits of retrofit to other agendas, to help monetise this work? For example, can we quantify health benefits to attract funding from the health sector?

Could a customer service fee (to both households and installers) help fund support?

Theme 10: Project and partnership management

Key points made by attendees:

Project management

- Projects require setup time to establish delivery team relationships, engage communities, refine messaging and channels, establish digital tools and set up requirements of installers and standards. Some tweaking/bedding in should be anticipated.
- Every household is different, and it's important to establish triaging so that the right support is offered. It can cause issues when organisations have different triage approaches.
- Staff need appropriate training. This can be expensive and time-consuming, but long term can bring down survey costs by using in-house retrofit and EPC assessors.
- 'Retrofit coordinator' can be a useful role, being able to support most of the retrofit process without holding assessor qualifications.
- Having a retrofit coordinator onsite during installation can improve quality and ensure issues are rectified on the day – it can be hard to get installers to come back.
- It can be hard to track leads when advice providers are working on multiple schemes.
- There's a need to account for (and anticipate) changing costs during delivery (e.g. salaries, training).
- Project managing the retrofit process requires skill and confidence to challenge contractors over poor service. Installer work must be independently checked, and it's useful to have in-house expertise in setting contractual arrangements.
- Retrofit assessors and coordinators (where roles are separate) need to communicate effectively; this was not always the case in LEAD projects.
- It helps to have clearly defined stages within retrofit coordination.
- Several projects reflected that, if redesigning their scheme, they would allow for a more incremental approach to actions and measures. This could particularly benefit self-funded works.
- There can be an issue with giving leads to installers then losing the householder relationship.
- Some coordination issues were experienced with household enquiries, processes and software, leading to eligible applications being overlooked or accidentally rejected.
- Retrofit assessments can take much longer than expected (e.g. only three per day). One project reported finding that freelance assessors were much more productive with their time.
- Households may need help with getting and understanding quotes.

- People in the able-to-pay market want to make their own decisions on measures and installer choice.
- Passcodes worked well to help vulnerable households feel more confident in avoiding scams.
- Follow-up and installation aftercare should be built into scheme design.
- Energy champions are very useful, but volunteers can feel let down if you haven't planned a legacy/exit strategy when funding to support them ends.

Partnership management

- Partners can bring complementary skills and help provide a more holistic service to households. This is particularly important for vulnerable households, and might include hoarding charities or Care & Repair for pre-installation works. It can help to give these partners basic training in energy advice.
- Working with partners already embedded in the community can improve reach (see Theme 1).
- Health services can be especially valuable partners (including GPs and health workers). If data sharing could be improved between health care providers and social services, this could improve engagement with residents in need.
- Consortia can provide shared resources and consistency, which can help with processes, codes of conduct and marketing.
- When working with partners who will deliver energy advice, it's important to make sure they are skilled/trained before they start.
- There are pros and cons to working with wider partners, such as DNOs or health services (e.g. DNOs think of 'communities' as substation areas, rather than socially meaningful neighbourhoods).
- Larger organisations in a consortium can provide a cashflow buffer that allows smaller organisations to take part.

SPOTLIGHT ON...

Birmingham Voluntary Service LEAD and Far South West Retrofit Consortium:

These consortiums included partners of a range of sizes, with larger partners enabling smaller ones to take part through capacity and cashflow management.

Far South West Retrofit Consortium:

This project used follow-up calls after six months to maintain progress and household contact. A database of residents enables contact when new funds are launched, and before/after surveys help evaluate the impact of advice on household confidence with retrofit.

QUESTIONS

There is a lot of interest in improving links with health services (e.g. GPs, health workers). Could the Hubs help facilitate this?

How can we better share resources? Noted: DESNZ is working on a central bank of information.

Links

SWNZH LEAD Webinar Series [Power in Partnerships: collaboration and consortiums](#)

Theme 11: Fund and funding challenges

Key points made by attendees:

Measuring project performance (KPIs)

- It can be hard to capture the benefits of energy efficiency advice.
- The competitive nature of funding incentivised applicants to overpromise on early KPI delivery.
- Expectations to immediately start deliver KPI results under LEAD were unrealistic, and in some cases provided a perverse incentive to scheme design.
- A lead-in period would have allowed community engagement to inform KPIs, leading to better scheme design and evaluation.

Integration with other funding streams

- LEAD projects were working outside of specific funding streams (HUG, ECO, etc.) and there were integration issues that hampered delivery, both with scheme design and installer engagement.

'Missing middle' audiences

- There are large numbers of people falling in the gap between eligibility for grants and genuinely able-to-pay. This includes some people in fuel poverty.
- A wide spectrum of funding would be useful to fit different levels of self-funding capacity, including more attractive long-term loans.

Quality assurance

- Quality assurance is not sufficiently supported in Government schemes.
- Cost is sometimes prioritised over suitability of materials, and previous schemes have enabled retrofit using the wrong type of insulation for the property.

Covering costs

- It's hard to break even on delivery of retrofit assessments, even with grant support. This has resulted in at least one LEAD project choosing not to offer this service, and can sometimes put installers off engaging with the scheme.
- Organisations need to subsidise work from other funding streams, but often these don't easily align.

Cashflow

- Payment in arrears is difficult for smaller organisations to manage.
- Within consortiums, larger organisations have needed to provide a cashflow buffer for smaller partners.

Intermittent funding

- Interrupted flows of funding undermine household engagement and trust, and slow overall progress of retrofit aims.
- It can be difficult to design appropriate supporting software due to the changing nature of the funding landscape.

- LEAD staff teams have gathered much knowledge and experience, but there is a lot of uncertainty about next steps as future funding opportunities are not yet clear.

Other points

- Planning constraints for heritage buildings often exclude these properties from projects, as grant eligibility and timescales for securing planning permission undermined participation.
- Building Regulations (Part L) and PAS 2035 Retrofit Standards aren't seamlessly aligned.
- Energy debt vouchers for struggling households are only short-term fixes and not a sustainable solution to ending fuel poverty.
- The community energy sector needs more seed funding, like LEAD, to develop delivery models that are self-funding or subsidised.
- Some household structures – particularly intergenerational households where a large family is supported by one or two earners – can be ineligible for support as they earn too much, but their outgoings mean that they are still struggling with costs, as well as overcrowding and damp issues. DESNZ commented that this is a key policy challenge being explored.
- There is a need to better advertise information about schemes and available support on a national level. Information can be hard for households to find independently.



Legacy and next steps

Key points made by attendees:

- Participants were very keen to share information and felt they could learn a lot from each other.
- For some projects, LEAD work has helped clarify scope of energy advice, relationships between paid roles and volunteers, and triage processes.
- Other projects cited stronger relationships and better practical skills in delivering schemes.
- Some projects have been able to improve their internal capability for future work through accredited training for advisors and assessors.
- In some cases, projects raised questions around what the boundaries of advice should be.
- Interest in advice through LEAD has increased over time, and projects are keen to maintain momentum.
- Some projects have secured follow-on funding from sources including the Energy Redress Scheme and DNOs.
- Some projects are continuing on a smaller scale, while others have needed to close when LEAD funding ended.
- Several projects are looking in more depth at options for self-funded audiences and potential fee-based services.
- In the South West, a detailed LEAD toolkit has been produced, capturing learnings from the six South West LEAD projects following an earlier regional event.
- DESNZ confirmed that a LEAD evaluation will be published, but data was still being gathered at the time of the conference.

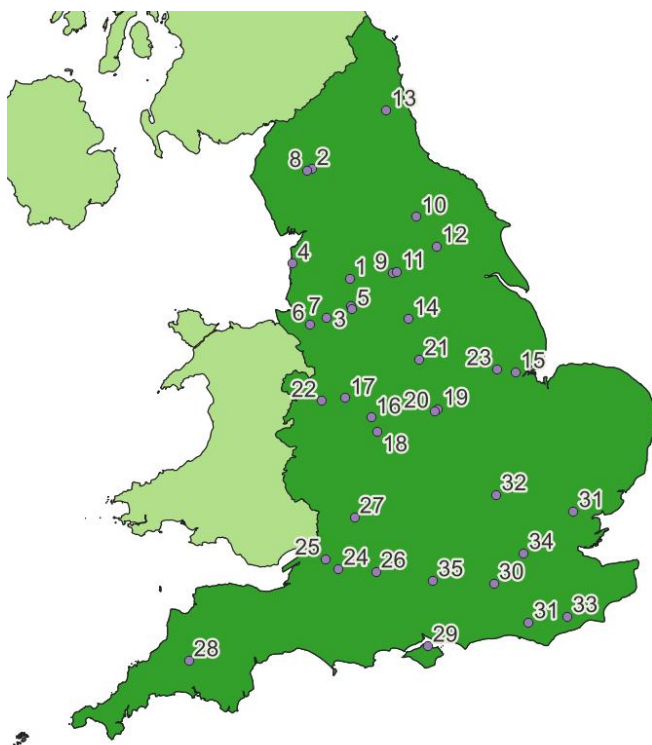
Links

[South West LEAD Toolkit](#)



LEAD projects

Nationally, 36 projects were originally awarded funding, with 35 successfully delivered. Bold denotes project names, followed by the lead partner name. Map points have been placed roughly in the middle of delivery areas.



- | | | | |
|--|--|---|--|
| 1. Rossendale Valley LEAD
Rossendale Valley Energy | 8. Groundwork Yorkshire LEAD
Groundwork Yorkshire | 15. East Lindsey LEAD
East Lindsey District Council | 25. West of England LEAD
Centre for Sustainable Energy |
| 2. Cold to Cosy Homes Cumbria
Cumbria Action for Sustainability | 9. Yes Energy LEAD
Yes Energy | 16. Hilary School Sustainable Education Programme
Walsall Council | 26. Futureproof Wiltshire
Centre for Sustainable Energy |
| 3. DLEADP
Greater Manchester Combined Authority | 10. North Yorkshire LEAD
North Yorkshire Council | 17. The Warmer Homes Project
Socially Grown Warmer Homes | 27. Severn Wye LEAD
Severn Wye Energy Agency |
| 4. Blackpool Eco Hub
Groundwork CLM | 11. West Yorkshire Combined Authority LEAD
West Yorkshire Combined Authority | 18. Birmingham Voluntary Service LEAD
Birmingham Voluntary Service Council (BrumEnergy) | 28. Far South West Retrofit Consortium
Plymouth Energy Community |
| 5. Energise Manchester
Carbon Co-op | 12. City of York Council LEAD
City of York Council | 19. Green Living Leicestershire – Home Energy Retrofit Advice Service
Leicestershire County Council | 29. Energywise
Testlands and Green Isle of Wight |
| 6. Retrofit Buddies
Energy Projects Plus | 13. North of Tyne LEAD
North of Tyne Combined Authority | 20. Leicester City LEAD
Leicester City Council | 30. Surrey Consortium
Surrey County Council |
| 7. Domestic Energy Efficiency and Retrofit Advice for Landlords (DEERAL)
Pure Leapfrog | 14. Efficiency North LEAD
Efficiency North | 21. Nottingham Energy Partnership LEAD
Nottingham Energy Partnership | 31. CommuniHeat (two locations)
Community Energy South |
| | | 22. Marches Energy Agency LEAD
Marches Energy Agency | 32. HERO Project
National Energy Foundation |
| | | 23. Lincs 4 Warmer Homes
North Kesteven District Council | 33. Citizens Advice 1066 LEAD
Citizens Advice 1066, |
| | | 24. Green Heritage Homes
Bath and West Community Energy | 34. South-East London Community Energy LEAD
South East London Community Energy |
| | | | 35. Basingstoke and Deane LEAD
Basingstoke and Deane Borough Council |

Conference attendees

LEAD Project Partners:

Align Property Partners
Basingstoke & Deane Borough Council
Bath & West Community Energy
BrumEnergy
Carbon Coop
Centre for Sustainable Energy
Cheltenham Borough Council
Citizens Advice 1066
Communities for Renewables
Community Energy Pathways
Cotswold District Council
East Lindsey District Council
ECOE Advice
EN:Able Communities/ Efficiency North
Energy Projects Plus
361 Energy
Forest of Dean District Council
Greater Manchester Combined Authority
Green Isle of Wight CIC
Groundwork
Leicester City Council
Leicestershire County Council
Marches Energy Agency
Nottingham Energy Partnership
Plymouth Energy Community
Pure Leapfrog
Repowering London

Rossendale Valley Energy
Severn Wye Energy Agency
South East London Community Energy
Surrey County Council
The National Energy Foundation
Walsall Council
Wigan Council
Your Home Better

LEAD Managers and Funders:

Greater South East Hub
North West Net Zero Hub
South West Net Zero Hub
North East & Yorkshire Net Zero Hub
Midlands Net Zero Hub
Department for Energy Security & Net Zero (DESNZ)

LEAD was funded by the **Department for Energy Security and Net Zero** and was coordinated by the Local Net Zero Hubs.

The LEAD National Conference was delivered by all five Local Net Zero Hubs working together, supported by DESNZ, and with South West Net Zero Hub taking a lead on planning, presenting and reporting.

