

**This is not a contract document**

---

# **Procurement Technical Brief Home Upgrade Grant (HUG2)**

Prepared by: Stacy Sheppard, Retrofit Development Manager  
[Stacy.sheppard@Wiltshire.gov.uk](mailto:Stacy.sheppard@Wiltshire.gov.uk)  
Tel: 01225 713458

---

## Summary of project

Wiltshire Council has been successful in securing more than £3.6m of Government funding to help to increase the energy efficiency of housing in the county. The funding is part of the Governments net Zero Homes Upgrade Grant, Phase 2 scheme (HUGS 2) and will be spent on retrofitting up to 210 Wiltshire Homes by March 2025, supporting the council's ambition for the county to be carbon neutral.

Homes which benefit from these improvements will have a starting EPC of D or lower and be improved to an EPC band C or higher (D for EPC F-G homes). This funding will allow the council to support retrofit for off-gas owner occupied homes subject to household income levels. Further details about grant eligibility and delivery can be found [here](#).

Retrofits will follow a fabric first approach and installers must be certified to the most recent version of PAS 2030:2019 and able to work to the latest PAS2035 guidance. The grant is calculated with an average total cost per home of £18,000.

Wiltshire Council are looking to award to a Turnkey project to a managing agent or principal contractor who can provide the whole suite of activities outlined below in the Capabilities table. Provision of these services can be delivered by in-house staff, sub-contracted to other organisations or a mixture of both, where the managing agent or principal contractor is responsible for coordinating the activities of all subcontractors, including planning, management, monitoring and coordination of health and safety. The principal contractor will control the organisation and construction phases of the project and take into account the health and safety risks to everyone affected by the work and plan and manage the measures needed to control them.

## Objectives

The funding has been awarded to deliver energy efficiency measures to between 175 and 210 eligible dwellings in Wiltshire and to increase their EPC rating to EPC band C for band D and E properties and EPC band D for band F and G properties by March 2025, with the last property batches to be submitted in December 2024. It is anticipated that most of the properties will require loft and/or cavity wall insulation, with some installations of flat roof insulation, Air Source Heat Pumps and external wall insulation. There is limited funding available for other measures, for example, solar PV, battery storage, double glazing, underfloor insulation, and electric heating.

## Values

- Delivering social value
- Maximising Equality, diversity, and inclusion benefits
- Local job creation in Wiltshire
- Building skills for a local supply chain and to support the growth of the green economy in Wiltshire.
- To address fuel poverty by offering support to the most vulnerable households in the most economically deprived neighbourhoods.
- Resident health improvements: improving health and wellbeing outcomes for those who are living in cold homes and to reduce demand on health and social care.
- Sustainable procurement; including the promotion of circularity, reduction of virgin material use, eliminating and managing waste, targeting local air quality (using electric vehicles or offsite processes) and reducing embodied carbon emissions, for example use of a low embodied carbon insulation material.

Services	
Capability	Examples of common/best practice
Lead Generation	<ul style="list-style-type: none"> <li>• Data analysis to identify property archetypes, common measures and geographical 'hotspots'</li> <li>• Confidence modelling and analysis to help process and understand the accuracy of the EPC data and develop schemes of work</li> <li>• Identification of eligible homes through tailored marketing, using a variety of methods and approaches to reach multiple demographics and communities</li> <li>• Communication of the scheme to a targeted audience</li> <li>• Insights and analysis provided on lead generation metrics for eligible and targeted homes, including number of leads, conversion rates, lead response time, cost per lead, sales cycle length.</li> </ul>
Validation of eligibility	<ul style="list-style-type: none"> <li>• Provision of an eligibility validation service to confirm if a household is eligible for HUG2 funding in line with HUG2 eligibility rules, strategic fit and available budget.</li> <li>• Management and validation of leads from a variety of sources included those generated through targeted marketing and the DESNZ HUG eligibility Checker Portal.</li> <li>• To include income eligibility verification processing to confirm proof of eligibility adhering to data security requirements.</li> <li>• Undertake a desktop assessment of eligible properties to confirm the existing EPC and the suitability of proposed energy efficiency measures, ensuring all leads match the required project and grant outcomes.</li> <li>• Provision of EPC's as required for properties where the EPC is out of date or unavailable.</li> <li>• Adherence to data security requirements.</li> <li>• Insights and analysis provided for eligibility metrics including acceptance rates and installation surveys planned.</li> </ul>
PAS 2035 specialist roles	<ul style="list-style-type: none"> <li>• <b>Assessment:</b> PAS2035 compliant retrofit assessment.</li> <li>• Pre and post EPC's undertaken and lodged where required.</li> <li>• <b>Retrofit design and Coordination;</b> PAS 2035 compliant retrofit design and coordination providing clear communication points for the customer to agree to a suitable retrofit plan for their home.</li> <li>• Improvement option plan and medium-term plan.</li> <li>• Works specifications</li> <li>• Planning permissions or certificate of lawful development as required</li> </ul>
Procurement and supply chain / installer/ subcontractor management	<ul style="list-style-type: none"> <li>• Tender for a range of relevant suppliers and installers to meet the objectives of the project.</li> <li>• Batch identification and approval to include eligible housing stock data, measure mixes and costs for a batch of homes that are ready to retrofit.</li> <li>• Call off contracts or mini competitions for each batch of retrofit ready properties as services are required.</li> </ul>
Customer engagement and retrofit journey management	<p><b>Retrofit awareness</b></p> <ul style="list-style-type: none"> <li>• Customer awareness including information about proposed measures and benefits and the retrofit programme. Understanding tenant motivations and concerns. Identification of potential risks and issues and mitigation.</li> </ul> <p><b>Design and installation</b></p>

	<ul style="list-style-type: none"> <li>• Management of householder expectations in line with PAS 2035 and recommendations of measures aligned to scheme rules and budget availability.</li> <li>• Provision of technical information including FAQ's for measures and process</li> <li>• Customer journey management throughout the project, including maintaining regular communications about eligibility, construction activities, timelines and householder signup.</li> </ul> <p><b>Handover and aftercare services</b></p> <ul style="list-style-type: none"> <li>• Single point for customer queries and complaints handling</li> <li>• Customer care and provision of aftercare services and support services for customers throughout their journey.</li> <li>• Product support, energy advice and tariff comparison through phone consultations, video calls and home visits</li> <li>• Identify and refer householders to any further relevant support services and funding.</li> <li>• User documentation and residents manual</li> <li>• Insights and analysis on customer experience</li> </ul>
Installation	<ul style="list-style-type: none"> <li>• Principle contractor role to be responsible for retrofit works delivered throughout the entire project life cycle, responsible for coordinating the activities of all subcontractors, including planning, management, monitoring and coordination of health and safety.</li> <li>• Statutory approvals</li> <li>• Customer journey mapping and management of installs.</li> <li>• PAS2030 Compliant installation of EEM's via in-house or sub-contractors.</li> <li>• Testing</li> <li>• Commissioning</li> </ul>
Contract management	<ul style="list-style-type: none"> <li>• Management of the deployment of the project to include supply chain management</li> <li>• Monitoring</li> <li>• KPI management and reporting</li> </ul>
Compliance and Scheme Reporting	<ul style="list-style-type: none"> <li>• Provision of performance monitoring data relating to customer journey mapping including number of sign-ups, assessments, and installations in line with HUG 2 data collection requirements and KPI's.</li> <li>• Insights and analysis into delivery data.</li> <li>• Quality assurance</li> </ul>