

**Oversight and Governance**

Chief Executive's Department

Plymouth City Council

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Delegated Decisions

Delegated Executive/Officer Decisions

Notice of call-in for non-urgent decisions must be given to the Democratic Support Team by 4.30 pm on Tuesday 08 July 2025. Please note – urgent decisions and non-key Council Officer decisions cannot be called in. Copies of the decisions together with background reports are available for viewing as follows:

- on the Council's Intranet Site at <https://modgov/mgDelegatedDecisions.aspx>
- on the Council's website at <https://tinyurl.com/3hwmppzp>

The decisions detailed below may be implemented on Wednesday 09 July 2025 if they are not called-in.

Delegated Decisions

I. Councillor Tudor Evans OBE - Leader of the Council:

Ia. L02 25/26 The Warm Homes: Local Grant

(Pages 1 - 44)

EXECUTIVE DECISION

made by a **Cabinet Member**



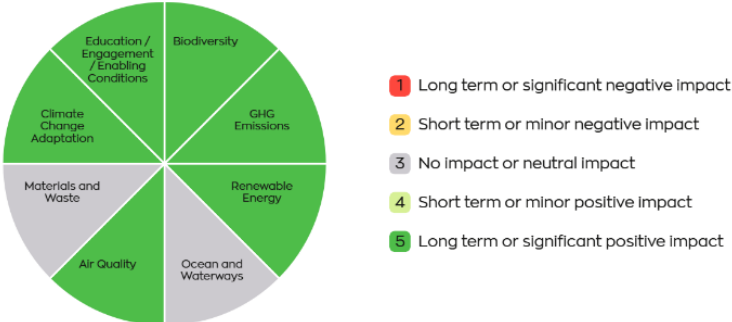
REPORT OF ACTION TAKEN UNDER DELEGATED AUTHORITY BY AN INDIVIDUAL CABINET MEMBER

Executive Decision Reference Number – L02 25/26

Decision	
1	Title of decision: The Warm Homes: Local Grant
2	Decision maker (Cabinet member name and portfolio title): Councillor Tudor Evans OBE, Leader of the Council
3	Report author and contact details: Nicola Turvey, Net Zero Delivery Officer 01752 304118 nicola.turvey@plymouth.gov.uk
4	Decision to be taken: It is recommended that the Leader of the Council: <ul style="list-style-type: none"> • Approves the Warm Homes Local Grant Business Case; • Allocates £2,571,244.90 for the project into the Capital Programme, fully funded by The Warm Homes Local Grant; • Authorises the procurement process; • Delegates the award of the contract to Service Director for Strategic Planning & Infrastructure where they do not already have authority to do so.
5	Reasons for decision: <ol style="list-style-type: none"> 1. Utilise funding to increase the insulation and heating performance, with the aim of reducing the homes heating need and cost to reach a comfortable level of internal warmth, and retain the warmth for longer; 2. Focus the funding on eligible Plymouth residents living in low-income households at risk of, or living in fuel poverty; 3. Use the funding to install effective ventilation measures to reduce internal damp and mould issues; 4. Where it is identified as suitable, to fully funding homes transition from mains gas boilers to air source heat pumps, significantly reducing the homes annual carbon footprint generated from heating.
6	Alternative options considered and rejected: <ol style="list-style-type: none"> 1. To apply for a smaller grant, to treat a smaller number of homes over the 3-year period – this was rejected as Plymouths objective is to secure the maximum grant allocation possible to support, treat and improve as many eligible homes as possible over the next 3 x year period. We also evaluated our internal capacity and staff resourcing in partnership with delivery partner Plymouth Energy Community, and it was agreed between both organisations we have enough resource to deliver the maximum size of scheme available to us. 2. To apply for a larger grant to treat a higher number of homes over the 3 year period – this was rejected as application rules prevented Plymouth from applying for any further funding, and our currently submitted

	<p>Expression of Interest was at the maximum value allowable based on the set calculation of previous best delivery performance over a 6 x month period, and then increased by 10%</p> <p>3. To receive funding for our original bid submission of £11m to treat 770 x homes. Unfortunately, in the grant allocation award letter issued to PCC on 28/02/2025 DESNZ noted that there was a 3-fold oversubscription to access this funding from LA's across England, and total bids received for DESNZ's currently ringfenced £500m warm homes fund, were in excess of £1.7billion. As a result, each Local Authority's Expression of Interest was proportionately scaled down by over 2/3rds. In Plymouth City Councils case we have been allocated 27% of what we bid for.</p> <p>4. Not to participate and deliver this funding – this option is rejected as it is Plymouth City Councils responsibility to ensure this funding can be accessed by our residents; and as a council we have a mature and well developed retrofit delivery team, working cross organisationally with our delivery partner Plymouth Energy Community. Across the 2 x organisations we have embedded a clear process and set of procedures to reach and treat eligible privately owned and privately rented homes across the city. The cross organisational team is competent and skilled to work with each household, each with varying circumstances and needs, to ensure the funding is maximised to best benefit the occupants and use of the home.</p>
7	<p>Financial implications and risk:</p> <p>Capital</p> <p>This grant covers 100% of the capital delivery cost.</p> <p>There will be no capital borrowing or risk request attached to the delivery of this grant.</p> <p>Revenue</p> <p>The grant terms allocate <15% of total grant funding for revenue expenditure. Revenue funding is required to be spent on administration and ancillary resulting from delivering this grant.</p> <p>Financial Year 1- a maximum of £75,300.90 revenue can be allocated to fund PCC staff salary costs. This means there will be a slight shortfall in grant funding to pay for PCC staff salaries, creating a financial risk.</p> <p>It is requested the Revenue Cost Centre GL2265 Retrofit Grant Delivery, which currently holds un-ringfenced funding from previous grant schemes now closed, is agreed to be utilised to support the project delivery staffing costs, mitigating financial exposure or risk of PCC exceeding the grant term that Admin and Ancillary/ Revenue costs must remain at <15%.</p>
8	<p>Legal Implications:</p> <p>1) By letter dated 28 February 2025, the Department for Energy Security & Net Zero (DESNZ) awarded Plymouth City Council £3,024,994 in respect of this matter. Attached to that letter was a 91 page Memorandum of Understanding (MoU) that Plymouth City Council was required to sign and return, signing up to numerous obligations in return for the above funding. Not the least of those obligations is at Paragraph 60 of the MoU on page 22, where it clearly states:</p> <p><i>“Where the Grant Recipient provides any funding to third parties for activities undertaken during the Funding Period, it will ensure that the provisions within this MoU are included in any arrangement with these third parties.”</i></p> <p>The above will need to be done robustly to comply with the MoU and there can be no pushback from third party delivery partners that Plymouth City Council chooses to fund from the above in that respect.</p> <p>2) It is understood that Plymouth City Council's third party delivery partners are likely to be 'Dartmoor Energy Limited (REGISTERED COMPANY NUMBER: 11731406) and 'PEC Trust' (REGISTERED COMPANY NUMBER: 11569012 (England and Wales) / REGISTERED CHARITY NUMBER: 1183711). In the PEC Trust charity's accounts for the year to 30 June 2024 it is stated that:</p>

	Related parties The charity forms part of a family of entities known as Plymouth Energy Community. They comprise of the following; PEC Management Services Limited (Company Limited by shares and wholly owned subsidiary of PEC Trust 14098558) Plymouth Energy Community (Community Benefit Society 32108) PEC Renewables (Community Benefit Society 32286) Ernesettle Community Solar Limited (Company limited by shares and wholly owned subsidiary of PEC Renewables 09892557) PEC Homes (Community Benefit Society 8356) PEC Homes Development Limited (Company Limited by shares and wholly owned subsidiary of PEC Homes 14161512) Chelson Meadow Community Solar (Company Limited by shares and 50% owned by PEC Renewables and 50% owned by Plymouth City Council 15255143)			
Accordingly, close monitoring will be necessary to ensure that no conflicts of interest occur.				
3) It is envisaged that the contracts to facilitate flow down grants from Plymouth City Council to ‘PEC Trust’ and ‘Dartmoor Energy Limited’ will take the form of the MoU between DESNZ and Plymouth City Council, flowed down back-to-back to each of them. If so, it will be important to ensure that any funds released to them do not breach the provisions of the Subsidy Control Act 2022.				
9	Is the decision a Key Decision? (Please contact Democratic Support for further advice)	Yes	No	Per the Constitution, a key decision is one which:
			X	in the case of capital projects and contract awards, results in a new commitment to spend and/or save in excess of £3million in total
			X	in the case of revenue projects when the decision involves entering into new commitments and/or making new savings in excess of £1million
			X	is significant in terms of its effect on communities living or working in an area comprising two or more wards in the area of the local authority.
	If yes, date of publication of the notice in the Forward Plan of Key Decisions	N/A		
10	Please specify how this decision is linked to the Council’s corporate plan/Plymouth Plan and/or the policy framework and/or the revenue/capital budget:	Corporate Plan: Delivering the Warm Homes: Local Grant will support the following Corporate Plan beliefs: <ul style="list-style-type: none">• Taking Responsibility – because we care about the impact of this action• Fairness – because we want to address inequality in our city• Co-Operation – because we can achieve more together in working with the residents and our delivery partner to offer the most suitable improvements the funding can provide and the following Corporate Plan priorities: <ul style="list-style-type: none">• Green investment in jobs and skills• Keeping children, adults and communities safe• Trusting and Engaging our communities• Focusing on prevention and early intervention Plymouth Plan: Delivering the Warm Homes: Local Grant will work towards the following Plymouth Plan ambitions: <ul style="list-style-type: none">• Delivering good quality, green homes		

		<p>With linked positive benefits that will feed into:</p> <ul style="list-style-type: none">• Delivering quality services for Plymouth residents• Access to first class health and care – by ensuring residents are progressed into additional health and care support services where a vulnerability is identified <p>Capital Budget:</p> <p>Delivering the Warm Homes: Local Grant will not require any direct capital investment from Plymouth City Council as all capital expenditure will be fully funded by the grant</p> <p>Revenue Budget:</p> <p>Delivering the Warm Homes: Local Grant may require some additional revenue budget to be made available as the grant is set to the ‘In-year’ financial rule, whereby Revenue must remain at or below 15% of the total capital expenditure for that year.</p> <p>As noted in financial risks, the grant may take a few months to mobilise and in this time it is unlikely any capital expenditure will occur, whereas there will be revenue expenditure from staffing and delivery partner costs. It is requested that revenue budget GL2265 Retrofit Staffing Costs remains ringfenced to support the delivery of the funding, to ensure revenue costs have a reserve fund to access should it be required.</p>
II	<p>Please specify any direct environmental implications of the decision (carbon impact)</p>	<p>Overall, this project generates long term positive climate impact in the following areas:</p> <ul style="list-style-type: none">• Biodiversity• GHG Emissions• Renewable Energy• Air Quality• Climate Change Adaptation• Education/ Engagement/ Enabling Conditions <p>Currently there is not a directly positive climate impact to:</p> <ul style="list-style-type: none">• Materials and Waste• Ocean Waterways <p>However, there is the opportunity to use this scheme to steer an improvement in retrofit practise when and where it interacts with these 2 x areas to ensure continual improvement is driven forwards.</p> <div></div>

Urgent decisions				
I2a	Is the decision urgent and to be implemented immediately in the interests of the Council or the public?	Yes		(If yes, please contact Democratic Support (democraticsupport@plymouth.gov.uk) for advice)
		No	X	(If no, go to section I3a)
I2b	Reason for urgency: n/a			
I2c	Scrutiny Chair Signature:		Date	
	Scrutiny Committee name:			
	Print Name:			
Consultation				
I3a	Are any other Cabinet members' portfolios affected by the decision?	Yes	X	
		No		(If no go to section I4)
I3b	Which other Cabinet member's portfolio is affected by the decision?	Councillor Chris Penberthy (Cabinet member for Housing, Co-Operative Development and Communities)		
I3c	Date Cabinet member consulted	19 March 2025		
I4	Has any Cabinet member declared a conflict of interest in relation to the decision?	Yes		If yes, please discuss with the Monitoring Officer
		No	X	
I5	Which Corporate Management Team member has been consulted?	Name		Glenn Caplin-Grey
		Job title		Strategic Director for Growth
		Date consulted		10 June 2025


Sign-off								
16	Sign off codes from the relevant departments consulted:	Democratic Support (mandatory)	JS11 25/26					
		Finance (mandatory)	ITG.25.26.015					
		Legal (mandatory)	LS/00001312/1/AC/15/4/25					
		Human Resources (if applicable)	N/A					
		Corporate property (if applicable)	N/A					
		Procurement (if applicable)	N/A					
Appendices								
17	Ref	Title of appendix						
	A	Briefing report for publication						
	B	Equalities Impact Assessment						
	C	Climate Impact Assessment						
	D	Warm Homes Local Grant Capital Business Case						
Confidential/exempt information								
18a	Do you need to include any confidential/exempt information?	Yes		<p>If yes, prepare a second, confidential ('Part II') briefing report and indicate why it is not for publication by virtue of Part I of Schedule 12A of the Local Government Act 1972 by ticking the relevant box in 18b below.</p> <p>(Keep as much information as possible in the briefing report that will be in the public domain)</p>				
		No	X					
		Exemption Paragraph Number						
		1	2	3	4	5	6	7
18b	Confidential/exempt briefing report title:							
Background Papers								
19	<p>Please list all unpublished, background papers relevant to the decision in the table below.</p> <p>Background papers are <u>unpublished</u> works, relied on to a material extent in preparing the report, which disclose facts or matters on which the report or an important part of the work is based. If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part I of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.</p>							
Title of background paper(s)		Exemption Paragraph Number						

	1	2	3	4	5	6	7

Cabinet Member Signature

20

I agree the decision and confirm that it is not contrary to the Council's policy and budget framework, Corporate Plan or Budget. In taking this decision I have given due regard to the Council's duty to promote equality of opportunity, eliminate unlawful discrimination and promote good relations between people who share protected characteristics under the Equalities Act and those who do not. For further details please see the EIA attached.

Signature		Date of decision	30/06/2025
Print Name	Councillor Tudor Evans OBE, Leader of the Council		

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WARM HOMES: LOCAL GRANT

Delivering retrofit improvements to eligible privately owned and rented Plymouth homes



1. EXECUTIVE SUMMARY

Plymouth City Council has been allocated a grant award from central government department of Energy Security and Net Zero (DESNZ) of £3,024,995.00 to fully fund thermal and heating improvements to over 200 eligible privately rented and owned homes across the city over the next 3 years up to March 2028.

2. BACKGROUND

The Warm Homes Local Grant (WH:LG) is a central government designed scheme to fully fund retrofit improvements to privately owned homes; as well as fully funding the first privately rented landlord property, and subsequently providing a 50% match fund for any further homes the same landlord chooses to elect from their portfolio into the scheme.

The eligibility criteria set for residents and homes to benefit from the grant fund is as follows:

- The home must have a total annual household income of £36,000.00 or less

Or

Is located within an IMD 1-2 postcode area

Or

The resident is in receipt of means tested benefits

And

- The home has an Energy Performance Certificate of D or lower (E, F, G)

In December 2024 Plymouth City Council submitted an ambitious Expression of Interest to the Central Government Department of Energy Security and Net Zero (DESNZ) to improve eligible Plymouth homes over the project's delivery duration, which runs for 3 years from 01/04/2025 – 31/03/2028.

On 28 February 2025 DESNZ confirmed that Plymouth City Council had been successful in receiving allocated grant funding, however due to a significant oversubscription of the fund from Local Authorities across England, all LA expressions of Interest were scaled down by 2/3'rds.

As a result Plymouths grant award is currently £3,024,995.00 to improve over 200 x eligible homes over the next 3 years.

Current Business Need – Plymouths Housing Stock:

Based on [Parity Data](#), Plymouth currently has ~123,360 homes, some facts on these homes are:

- 70% constructed prior to 1975
- 77% prior to 1984, the Building Act
- 6.7% constructed after 2012
- 67% are houses
- 28% are flats
- 48% are owner occupied
- 30% are privately rented
- 22% are social housing
- 64% of all homes either have, or are estimated to have, an EPC of D or lower

Current Business Need – Plymouth demographic, household composition and average earnings:

In the most recent census taken in [2021](#), Plymouth demographic was reported as:

- 264,700 total population
- 59% of the population over the age of 16
- 18.5% of population over the age of 65

53% of adults were in employment

22.7% were economically inactive

21.8% were retired

The 2021 census also recorded the household composition for Plymouth:

- 44% of homes either a one-person or lone parent household
- 41% of homes have a co-habiting couple
- 15% were HMO's

The Office for National Statistics produces annual salary data, broken down to LA area earnings and hours worked, by place of residence / local authority

The most recent [2023 dataset](#) records Plymouth's annual FTE salaries to be:

- Male median salary - £34,249.00
- Female median salary - £28,216.00

These statistics are important in suggesting that a large proportion of Plymouth residents may potentially be eligible to access the Warm Homes: Local Grant through the household income route, irrespective of whether or not their home is located within an IMD 1-2 postcode.

Current Business Need – Plymouths IMD 1-2 Postcode Areas:

Living in an IMD 1 or 2 postcode is another eligible route a resident can take to access the funding.

Index of Multiple Deprivation (IMD) is a countrywide measure for calculating the level of deprivation at a postcode level, a method that has been used since 1970. IMD1 and 2 postcode areas are categorised as having the highest level of deprivation. The ranking is based on 7 x category measures:

1. Income
2. Employment
3. Education
4. Health
5. Crime
6. Barriers to housing & services
7. Living environment

According to the [DESNZ dataset](#), Plymouth currently has 1,705 postcodes that fall into IMD 1 or 2. These 1,705 postcodes equate to:

- 23,220 homes located in an IMD 1 postcode area
- 17,367 homes located in an IMD 2 postcode area

= 40,587 (33%) of Plymouth homes in total

3. PROPOSED CHANGES AND REASONS

Plymouth City Council has the opportunity to deliver the WH:LG, targeting the funding towards the many homes that are most in need, ensuring the thermal and energy performance of these households are improved to create a warmer, healthier internal living environment for the resident, whilst seeking to reduce their annual utility bills.

The WH:LG funds both insulation measures, as well as clean heat technology installations, so whilst improving the building fabrics heat retention capabilities, we are also seeking to improve the heating methods, making the home more energy self-sufficient through measures such as solar pV to generate electricity, and should the scheme allow, to also install battery storage.

In working with each of these homes we will partner with supporting services to ensure that where a resident vulnerability or further need is identified, a need beyond that of the grant fund, we will signpost the resident into the relevant supporting service, ensuring they have access the full support services they may be entitled to.

We are already starting to generate partnership connections with other services beyond PECs fuel poverty advice team, partnerships such as with Devon & Somerset Fire and Rescue Service, to offer free fire safety visits, which could result in residents receiving free smoke and carbon monoxide alarms and help with safe exit plans from the home in the event of an emergency.

The Net Zero Delivery Team is also in discussion with both the Health Determinants Team and PEC's Fuel Poverty Advice Team to explore how we can most effectively evaluate the retrofit improvements delivered to a home, ensuring it does improve comfort and reduce heating costs, and if improvements identified, how we implement these to continually improve what is installed and how we work with the resident to ensure a long term noticeable benefit/ cost reduction is achieved.

4. ALTERNATIVE OPTIONS

1. To apply for a smaller grant, to treat a smaller number of homes over the 3-year period – this was rejected as Plymouths objective is to secure the maximum grant allocation possible to support, treat and improve as many eligible homes as possible over the next 3 x year period. We also evaluated our internal capacity and staff resourcing in partnership with delivery partner Plymouth Energy Community, and it was agreed between both organisations we have enough resource to deliver the maximum size of scheme available to us.

2. To apply for a larger grant to treat a higher number of homes over the 3 year period – this was rejected as application rules prevented Plymouth from applying for any further funding, and our currently submitted Expression of Interest was at the maximum value allowable based on the set calculation of previous best delivery performance over a 6 x month period, and then increased by 10%

3. To receive funding for our original bid submission of £11m to treat 770 x homes. Unfortunately, in the grant allocation award letter issued to PCC on 28/02/2025 DESNZ noted that there was a 3-fold oversubscription to access this funding from LA's across England, and total bids received for DESNZ's currently ringfenced £500m warm homes fund, were in excess of £1.7billion. As a result, each Local Authority's Expression of Interest was proportionately scaled down by over 2/3rds. In Plymouth City Councils case we have been allocated 27% of what we bid for.

4. Not to participate and deliver this funding – this option is rejected as it is Plymouth City Councils responsibility to ensure this funding can be accessed by our residents; and as a council we have a mature and well developed retrofit delivery team, working cross organisationally with our delivery partner Plymouth Energy Community. Across the 2 x organisations we have embedded a clear process and set of procedures to reach and treat eligible privately owned and privately rented homes across the city. The cross organisational team is competent and skilled to work with each household, each with varying circumstances and needs, to ensure the funding is maximised to best benefit the occupants and use of the home.

5. FINANCIAL IMPLICATIONS AND RISK

Capital

This grant covers 100% of the capital delivery cost.

There will be no capital borrowing or risk request attached to the delivery of this grant.

Revenue

The grant terms allocate <15% of total grant funding for revenue expenditure. Revenue funding is required to be spent on administration and ancillary resulting from delivering this grant.

A maximum of £76,577.34 revenue can be allocated to fund PCC staff salary costs. This means there will be a shortfall funding to pay for PCC staff salaries, creating a financial risk.


It is requested the Revenue Cost Centre GL2265 Retrofit Grant Delivery, which currently holds un-ringfenced funding from previous grant schemes now closed, is agreed to be utilised to support the project delivery staffing costs, mitigating financial exposure or risk of PCC exceeding the grant term that Admin and Ancillary/ Revenue costs must remain at <15%.

6. TIMESCALES

28 February 2025	DESNZ notified Plymouth City Council of WH:LG funding award
Before 28 March 2025	Plymouth City Council sign a Memorandum of Understanding with DESNZ to agree the grant value, proposed number of homes to treat and scheme requirements
March 2025	Plymouth City Council arranges a Mid Mobilisation Review to check our delivery structure
March – April 2025	Plymouth City Council undergoes a Delivery Assurance Check, and audit to confirm operationally ready to deliver the grant
01 April 2025 - 31 March 2028 (Funding awarded 1 April 2025, decision taken June 2025)	3 x year scheme duration to retrofit 206 eligible homes
May/June 2028	Final closure report submission to grant funder

EQUALITY IMPACT ASSESSMENT – WARM HOMES: LOCAL GRANT

SECTION ONE: INFORMATION ABOUT THE PROPOSAL

Author(s): The person completing the EIA template.	Nicola Turvey	Department and service:	Net Zero Delivery Team	Date of assessment:	04/03/2025
Lead Officer: Head of Service, Service Director, or Strategic Director.	Paul Barnard	Signature:		Approval date:	7,3,25
Overview:	<p>This EIA is to evaluate the impact of Plymouth City Council delivering the Warm Homes: Local Grant funding, provided by central government Department of Energy Security and Net Zero (DESNZ) to fully fund home improvements to eligible privately owned and privately rented homes across the city.</p> <p>The grant funding will pay for insulation, heating improvements and clean heat technology measures to improve the thermal performance of low income and fuel poor homes, to increase the thermal comfort and internal health of these homes.</p> <p>Plymouth City Council has secured £3,024,995.00 of grant funding to help improve 206 x homes over a 3 year period from 01/04/2025 – 31/03/2028.</p> <p>The residents and owners of these homes may reside in circumstances with complex needs, and particular physical and mental health vulnerabilities. It is essential that Plymouth City Council only appoints improvement works to installers who will be able to provide competent workman to attend these homes, and act in a respectful, compliant and inclusive manner when installing insulation, new products or making any changes within the residents home.</p> <p>It is essential that customer relations are well organised, documented and managed, and that a customer communications and complaints procedure is effectively implemented by the approved third party delivery partners and Installers working within these homes.</p>				
Decision required:	<p>It is recommended that the Leader of the Council:</p> <ul style="list-style-type: none"> • Approves the Warm Homes Local Grant Business Case • Allocates £2,571,244.90 for the project into the Capital Programme, fully funded by The Warms Homes Local Grant • Authorises the procurement process 				

- Delegates the award of the contract to Service Director for Strategic Planning & Infrastructure

SECTION TWO: EQUALITY IMPACT ASSESSMENT SCREENING TOOL

Potential external impacts: Does the proposal have the potential to negatively impact service users, communities or residents with protected characteristics?	Yes	X	No	
Potential internal impacts: Does the proposal have the potential to negatively impact Plymouth City Council employees?	Yes		No	X
Is a full Equality Impact Assessment required? (if you have answered yes to either of the questions above then a full impact assessment is required and you must complete section three)	Yes		No	X
If you do not agree that a full equality impact assessment is required, please set out your justification for why not.				

SECTION THREE: FULL EQUALITY IMPACT ASSESSMENT

Protected characteristics (Equality Act, 2010)	Evidence and information (e.g. data and consultation feedback)	Adverse impact	Mitigation activities	Timescale and responsible department
Age	<p>Plymouth</p> <ul style="list-style-type: none"> 16.4 per cent of people in Plymouth are children aged under 15. 65.1 per cent are adults aged 15 to 64. 18.5 percent are adults aged 65 and over. 2.4 percent of the resident population are 85 and over. <p>South West</p> <ul style="list-style-type: none"> 15.9 per cent of people are aged 0 to 14, 61.8 per cent are aged 15 to 64. 22.3 per cent are aged 65 and over. <p>England</p> <ul style="list-style-type: none"> 17.4 per cent of people are aged 0 to 14. 64.2 per cent of people are aged 15 to 64. 18.4 per cent of people are aged 65 and over. <p>(2021 Census)</p>	Only adverse impact identified could be in the Installer behaviour when entering the home of eligible residents	<p>Active and reviewed Customer Complaints Procedure provided by Installer</p> <p>Ongoing weekly meeting with Installer to review feedback from residents</p> <p>Independent 3rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property</p>	<p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – PEC to manage relational support with resident</p>

<p>Care experienced individuals</p> <p>(Note that as per the Independent Review of Children's Social Care recommendations, Plymouth City Council is treating care experience as though it is a protected characteristic).</p>	<p>It is estimated that 26 per cent of the homeless population in the UK have care experience. In Plymouth there are currently 7 per cent of care leavers open to the service (6 per cent aged 18-20 and 12 per cent of those aged 21+) who are in unsuitable accommodation.</p> <p>The Care Review reported that 41 per cent of 19-21 year old care leavers are not in education, employment or training (NEET) compared to 12 per cent of all other young people in the same age group.</p> <p>In Plymouth there are currently 50 per cent of care leavers aged 18-21 Not in Education Training or Employment (54 per cent of all those care leavers aged 18-24 who are open to the service).</p> <p>There are currently 195 care leavers aged 18 to 20 (statutory service) and 58 aged 21 to 24 (extended offer). There are more care leavers aged 21 to 24 who could return for support from services if they wished to.</p>	<p>Only adverse impact identified could be in the Installer behaviour when entering the home of eligible residents</p>	<p>Active and reviewed Customer Complaints Procedure provided by Installer</p> <p>Ongoing weekly meeting with Installer to review feedback from residents</p> <p>Independent 3rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property</p>	<p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – PEC to manage relational support with resident</p>
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Disability	<p>9.4 per cent of residents in Plymouth have their activities limited 'a lot' because of a physical or mental health problem.</p> <p>12.2 per cent of residents in Plymouth have their activities limited 'a little' because of a physical or mental health problem (2021 Census)</p>	<p>Only adverse impact identified could be in the Installer behaviour when entering the home of eligible residents</p>	<p>Active and reviewed Customer Complaints Procedure provided by Installer</p> <p>Ongoing weekly meeting with Installer to review feedback from residents</p> <p>Independent 3rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property</p>	<p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – PEC to manage relational support with resident</p>
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Gender reassignment	0.5 per cent of residents in Plymouth have a gender identity that is different from their sex registered at birth. 0.1 per cent of residents identify as a trans man, 0.1 per cent identify as non-binary and, 0.1 per cent identify as a trans women (2021 Census).	Only adverse impact identified could be in the Installer behaviour when entering the home of eligible residents	Active and reviewed Customer Complaints Procedure provided by Installer	Ongoing – Net Zero Delivery Team & PEC to manage with Installer
			Ongoing weekly meeting with Installer to review feedback from residents	Ongoing – Net Zero Delivery Team & PEC to manage with Installer
			Independent 3 rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property	Ongoing – PEC to manage relational support with resident

Marriage and civil partnership	<p>40.1 per cent of residents have never married and never registered a civil partnership. 10 per cent are divorced, 6 percent are widowed, with 2.5 per cent are separated but still married.</p> <p>0.49 per cent of residents are, or were, married or in a civil partnerships of the same sex. 0.06 per cent of residents are in a civil partnerships with the opposite sex (2021 Census).</p>	<p>Only adverse impact identified could be in the Installer behaviour when entering the home of eligible residents</p>	<p>Active and reviewed Customer Complaints Procedure provided by Installer</p> <p>Ongoing weekly meeting with Installer to review feedback from residents</p> <p>Independent 3rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property</p>	<p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – PEC to manage relational support with resident</p>
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Pregnancy and maternity	The total fertility rate (TFR) for England was 1.62 children per woman in 2021. The total fertility rate (TFR) for Plymouth in 2021 was 1.5.	Only adverse impact identified could be in the Installer behaviour when entering the home of eligible residents	<p>Active and reviewed Customer Complaints Procedure provided by Installer</p> <p>Ongoing weekly meeting with Installer to review feedback from residents</p> <p>Independent 3rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property</p>	<p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – PEC to manage relational support with resident</p>
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Race	<p>In 2021, 94.9 per cent of Plymouth's population identified their ethnicity as White, 2.3 per cent as Asian and 1.1 per cent as Black (2021 Census)</p> <p>People with a mixed ethnic background comprised 1.8 per cent of the population. 1 per cent of the population use a different term to describe their ethnicity (2021 Census)</p> <p>92.7 per cent of residents speak English as their main language. 2021 Census data shows that after English, Polish, Romanian, Chinese, Portuguese, and Arabic are the most spoken languages in Plymouth (2021 Census).</p>	<p>Only adverse impact identified could be in the Installer behaviour when entering the home of eligible residents</p>	<p>Active and reviewed Customer Complaints Procedure provided by Installer</p> <p>Ongoing weekly meeting with Installer to review feedback from residents</p> <p>Independent 3rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property</p>	<p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – PEC to manage relational support with resident</p>
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Religion or belief	<p>48.9 per cent of the Plymouth population stated they had no religion. 42.5 per cent of the population identified as Christian (2021 Census).</p> <p>Those who identified as Muslim account for 1.3 per cent of Plymouth's population while Hindu, Buddhist, Jewish or Sikh combined totalled less than 1 per cent (2021 Census).</p>	<p>Only adverse impact identified could be in the Installer behaviour when entering the home of eligible residents</p>	<p>Active and reviewed Customer Complaints Procedure provided by Installer</p> <p>Ongoing weekly meeting with Installer to review feedback from residents</p> <p>Independent 3rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property</p>	<p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – PEC to manage relational support with resident</p>
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Sex	51 per cent of our population are women and 49 per cent are men (2021 Census).	Only adverse impact identified could be in the Installer behaviour when entering the home of eligible residents	Active and reviewed Customer Complaints Procedure provided by Installer	Ongoing – Net Zero Delivery Team & PEC to manage with Installer
			Ongoing weekly meeting with Installer to review feedback from residents	Ongoing – Net Zero Delivery Team & PEC to manage with Installer
			Independent 3 rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property	Ongoing – PEC to manage relational support with resident

Sexual orientation	88.95 per cent of residents aged 16 years and over in Plymouth describe their sexual orientation as straight or heterosexual. 2.06 per cent describe their sexuality as bisexual, 1.97 per cent of people describe their sexual orientation as gay or lesbian. 0.42 per cent of residents describe their sexual orientation using a different term (2021 Census).	Only adverse impact identified could be in the Installer behaviour when entering the home of eligible residents	Active and reviewed Customer Complaints Procedure provided by Installer	Ongoing – Net Zero Delivery Team & PEC to manage with Installer
			Ongoing weekly meeting with Installer to review feedback from residents	Ongoing – Net Zero Delivery Team & PEC to manage with Installer
			Independent 3 rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property	Ongoing – PEC to manage relational support with resident

SECTION FOUR: HUMAN RIGHTS IMPLICATIONS

Human Rights	Implications	Mitigation Actions	Timescale and responsible department

SECTION FIVE: OUR EQUALITY OBJECTIVES

Equality objectives	Implications	Mitigation Actions	Timescale and responsible department
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Work together in partnership to: <ul style="list-style-type: none"> ▪ promote equality, diversity and inclusion ▪ facilitate community cohesion ▪ support people with different backgrounds and lived experiences to get on well together 	Residents receive poor workmanship or unprofessional treatment by approved Installers employees and subcontractors	<p>Active and reviewed Customer Complaints Procedure provided by Installer</p> <p>Ongoing weekly meeting with Installer to review feedback from residents</p> <p>Independent 3rd party Delivery Partner – Plymouth Energy Community - hand hold resident through their customer journey of receiving insulation/ clean heat improvements to their homes, and when contractors will be entering their property</p>	<p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – Net Zero Delivery Team & PEC to manage with Installer</p> <p>Ongoing – PEC to manage relational support with resident</p>
Give specific consideration to care experienced people to improve their life outcomes, including access to training, employment and housing.	A drive of the Warm Homes: Local Grant is to drive some of the grant funding secured into improving the social value received by Plymouth, through supporting training and apprenticeship opportunities, as well as upskilling businesses to PAS2030:2023 standard	Collaborate with City College and the PCC Apprenticeships team who focus on Build Plymouth	Ongoing throughout grant
Build and develop a diverse workforce that represents the community and citizens it serves.	A drive of the Warm Homes: Local Grant is to drive some of the grant funding secured into improving the social value received by Plymouth, through supporting training and apprenticeship opportunities, as well as upskilling businesses to PAS2030:2023 standard	Collaborate with City College and the PCC Apprenticeships team who focus on Build Plymouth	Ongoing throughout grant

Support diverse communities to feel confident to report crime and anti-social behaviour, including hate crime and hate incidents, and work with partners to ensure Plymouth is a city where everybody feels safe and welcome.	Working with our - Delivery Partner Plymouth Energy Community – we aim to build and foster a relational service with each resident participating in the scheme. Part of this relational support is to handhold them through the customer journey, as well as be able to sign post them into additional support services that PEC are already connected too (PEC are connected to over 150 x support services suited to Plymouth residents).		
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Warm Homes Local Grant

Project details

Assessment author

Nicola Turvey

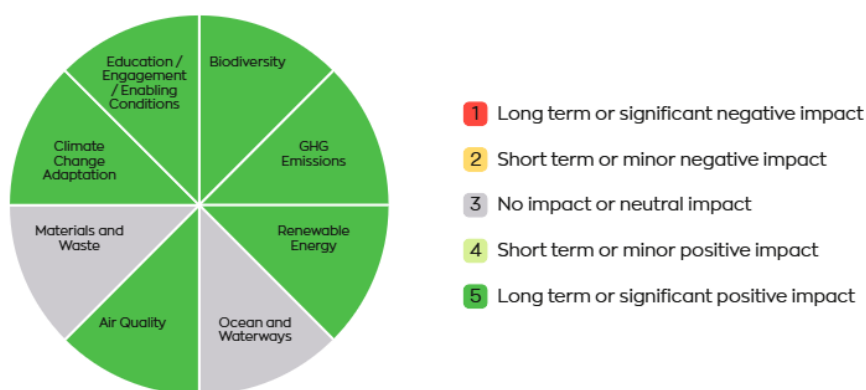
Project summary

Plymouth City Council has secured £3,024,995.00 of grant funding from the Central Government department of Energy Security and Net Zero (DESNZ), to fully fund the retrofit of 207 eligible privately owned and privately rented homes over the period of the Warm Homes: Local Grant duration from 01/04/2025 – 31/03/2028.

The retrofitted home improvements must focus on improving the thermal performance of the building fabric, or increase the energy efficiency of the heating provision. These improvements are known as retrofit measures which lead to an overall improvement in the homes energy efficiency. In improving the thermal performance of the home there will also be a key drive to improve the thermal comfort of the occupiers and the internal health of the homes.

The funding is targeted at low income and fuel poor households, to fully fund their home improvements, with a maximum allowance of £15,000.00 spent on energy efficiency measures, and £15,000.00 on low carbon heat improvement measures. As a result a home can receive up to £30,000.00 of retrofit improvements

Summary of assessment



Overall this project generates long term positive climate impact in the following areas: - Biodiversity- GHG Emissions - Renewable Energy- Air Quality- Climate Change Adaptation- Education/ Engagement/ Enabling Conditions.

Currently there is not a directly positive climate impact to: - Materials and Waste- Ocean Waterways.

However, there is the opportunity to use this project to steer an improvement in retrofit practise when and where it interacts with these 2 x areas. to ensure continual improvement is driven to ensure these areas also benefit from the retrofit delivery within the city.

Assessment scores

Biodiversity

Score

(5) Long lasting or extensive positive impact

Score justification

Nature conservation is not enhanced, however retrofit delivery will lead to heating interventions and improvements in privately owned and rented homes across the city; providing fully funded solutions to move homes away from reliance on open fires; wood burners; oil fuelled heating and gas fired central heating (all that emit pollutants into the atmosphere), and instead offer efficient replacements, such as electrically powered air source heat pumps, or solar pV to power electrically operated High Heat Retention Storage Heaters, which will reduce/ mitigate localised & national GHG emissions and particulate matter pollution from fossil fuel generated heating sources, and work towards improving the internal and external air quality, which may aid biodiversity improvements.

GHG Emissions

Score

(5) Long lasting or extensive positive impact

Score justification

The installation of effective renewable tech such as pV, or the replacement of gas boilers with ASHP, where the co-efficient is >3:1 will further reduce/mitigate GHG emissions

Renewable Energy

Score

(5) Long lasting or extensive positive impact

Score justification

The installation of effective renewable tech such as pV, coupled with battery storage or the replacement of gas boilers with low carbon heating solutions such as ASHP, where the co-efficient is >3:1 will further reduce/ mitigate GHG emissions

Ocean and Waterways

Score

(3) No impact or neutral impact

Score justification

It is not possible to record direct impact of retrofit delivery. However, retrofit delivery facilitates and funds the transition of a home away from oil or LPG heating methods, by installing low carbon alternatives. By changing a homes heating method from oil, removes the need for an oil tank, and removes the risk of a leak from the tank into the ground water or a spillage from the tank refill process, which could end up in a local water source or surface drainage which could potentially flow into local water source

Air Quality

Score

(5) Long lasting or extensive positive impact

Score justification

Retrofit delivery will lead to heating interventions and improvements in privately owned and rented homes across the city; providing fully funded solutions to move homes away from reliance on open fires; wood burners; oil fuelled heating and gas fired central heating (all that emit pollutants into the atmosphere), and instead offer efficient replacements, such as electrically powered air source heat pumps, or solar pV to power electrically operated High Heat Retention Storage Heaters, which will reduce/ mitigate localised & national GHG emissions and particulate matter pollution from fossil fuel generated heating sources, and work towards improving the internal and external air quality, which may aid biodiversity improvements.

Materials and Waste

Score

(3) No impact or neutral impact

Score justification

Retrofit Delivery may likely generate some waste products such as radiators, inefficient storage heaters; gas boilers, window and door replacements; packaging from insulation products. Most product wrapping is recyclable, and the contractors will need to follow their company policies in correctly disposing of packaging.

All contractors will need to follow their company policy and procedures in correctly disposing of waste or obsolete items, especially if they contain any hazardous substances. Should they contain hazardous substances, the correct waste transfer notes will be required to be obtained to evidence and audit trail of how item was removed - such as asbestos tiles from a roof, prior to pV being installed.

Climate Change Adaptation

Score

(5) Long lasting or extensive positive impact

Score justification

Yes - each home will receive a full survey from appropriately qualified Retrofit Assessor, which will be reviewed by Plymouth Energy Community's Retrofit Specifier, and overseen by a third party Retrofit Co-Ordinator to ensure the improvement and interventions provided to each home are in line with considerations of cooling as well as heating requirements, to ensure the residents are protected from the property overheating in summer months, and sufficiently ventilated to mitigate/ minimise damp, especially due to the geographical location of Plymouth, whereby being in the SW we have a higher level of exposure to driven wet rain, which saturates house walls and humid weather conditions, which aids the growth of mould should the home not be dry and ventilated enough to prevent this.

Education / Engagement / Enabling Conditions

Score

(5) Long lasting or extensive positive impact

Score justification



Yes - the Energy

Efficiency Dynamic Purchasing System will be developed to support local micro and SME businesses in upskilling to PAS2030 certification/ standard, which will enable the retrofit funding secured to be invested back into Plymouths local economy. In doing so an aim is to collaborate with the city college to increase the PAS2030 training courses available to upskill Plymouths workforce to this standard in delivering either fabric first or low carbon heat installations. In addition to the local economy, Plymouth will work with over 500 x residents to improve their homes thermal and energy performance, which in turn will build this awareness into the residents in receipt of grant funded improvements, and through word of mouth they may increase awareness on retrofit amongst their friends and family. We hope retrofit could also become an education piece of learning among school age children, who could actively participate in this learning through school engagement events or through education clubs within local communities.

CAPITAL INVESTMENT BUSINESS CASE

(Warm Homes: Local Grant)



EXECUTIVE SUMMARY

Key notes from section 1

It is identified there is a need to improve the thermal comfort and energy efficiency of 2/3rds of the city's homes.

The Warm Homes: Local Grant provides an opportunity for Plymouth City Council to fully fund retrofit measures for eligible residents, to improve their homes internal warmth and energy efficiency over the longer term.

Key notes from section 2

Plymouth City Council will keep an active risk register and fraud management plan in place to mitigate known risks.

Devon Audit Partnership will be contracted annually to audit the financial transactions of the grant spend, ensuring compliance is being met with grant requirements.

Key notes from section 3

The many positive Climate Impacts and Equality impacts generated by this grant fund range from Greenhouse Gas reductions by moving homes away from fossil fuelled heating systems to cleaner heating equipment, through to Climate Change Adaptation by better controlled ventilation and thermally insulating the home against the warmth as well as the cold.

Key notes from section 4

No capital borrowing is required to deliver this project

key risks

This grant fund will expose Plymouth City Council to risks such as potential fraud, error and unexpected ancillary expenditure to treat a home. However, Plymouth City Council has an established and strong working system with delivery partner Plymouth Energy Community's PEC Trust (*Companies House # 11569012*) through a Grant Agreement to ensure all works undertaken are independently assessed and signed off, with office teams providing sufficient scrutiny to identify or mitigate these risks

SECTION I: PROJECT DETAIL

Project Value (indicate capital or revenue)	£2,571,244.90 - Capital	Contingency (show as £ and % of project value)	£0.00
	£453,749.10 - Revenue		0%
	£3,024,994.00 – Total		
Portfolio Holder	Cllr Tom Briars-Delve, Cabinet Member for Environment and Climate Change	Directorate	Growth
		Service Director	Paul Barnard
Senior Responsible Officer (client)	Paul Barnard	Project Manager	Nicky Turvey

Address and Post Code		Ward	Citywide
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Current Situation:

Current Opportunity - The Warms Homes Local Grant:

On the 28 February 2025 the central government Department of Energy Security and Net Zero (DESNZ) confirmed Plymouth City Council has been awarded, in principle, a grant allocation of £3,024,994.00 to fully fund the retrofit home improvements of 206 properties over the next 3 year period, from 01/04/2025 – 31/03/2028.

The Warm Homes Local Grant (WH:LG) is a scheme designed to fully fund thermal and heating upgrades to privately owned homes; as well as fully funding the 1st privately rented landlord property, and subsequently providing a 50% match fund for any further homes the same landlord chooses to elect from their portfolio into the scheme.

The eligibility criteria for residents and homes to benefit from the grant fund is as follows:

- The home must have a total annual household income of £36,000.00 or less

Or

- Is located within an IMD 1-2 postcode area

Or

- The resident is in receipt of means tested benefits

And

- The home has an Energy Performance Certificate of D or lower (E, F, G)

Before the submission window closed on 2 December 2024, Plymouth City Council initially submitted an EoI to treat 773 homes over the project's delivery duration, which runs for 3 years from 01/04/2025 – 31/03/2028.

However, in the grant allocation award letter issued on 28/02/2025 DESNZ noted that there was a 3-fold oversubscription from LA's across England, and total bids received for DESNZ's currently ringfenced £500m warm homes fund, were in excess of £1.7billion.

As a result, each Local Authority's Expression of Interest was proportionately scaled down by over 2/3rds, and Plymouth's final grant allocation was set out as follows:

	3. Final Allocation post scaling (in principle)	Capital Allowance at >85%	Rev Allowance at <15%	Homes Treated
Total across whole Funding Period	£3,024,994.00	£2,571,244.90	£453,749.10	206
FY1 FY 25/26	£502,006.00	£350,756.30	£151,249.70	28
FY2 FY 26/27	£1,274,389.00	£1,123,139.30	£151,249.70	90
FY3 FY 27/28	£1,248,599.00	£1,097,349.30	£151,249.70	88

Current Business Need – Plymouth's Housing Stock:

Based on [Parity Data](#), Plymouth currently has ~123,360 homes, some facts on these homes are:

- 70% constructed prior to 1975
- 77% prior to 1984, the Building Act
- 6.7% constructed after 2012

- 67% are houses
- 28% are flats
- 48% are owner occupied
- 30% are privately rented
- 22% are social housing
- 64% of all homes either have, or are estimated to have, an EPC of D or lower

Current Business Need – Plymouth demographic, household composition and average earnings:

In the most recent census taken in [2021](#), Plymouth demographic was reported as:

- 264,700 total population
- 59% of the population over the age of 16
- 18.5% of population over the age of 65
- 53% of adults were in employment
- 22.7% were economically inactive
- 21.8% were retired

The 2021 census also recorded the household composition for Plymouth:

- 44% of homes either a one-person or lone parent household
- 41% of homes have a co-habiting couple
- 15% were HMO's

The Office for National Statistics produces annual salary data, broken down to LA area earnings and hours worked, by place of residence / local authority

The most recent [2023 dataset](#) records Plymouth's annual FTE salaries to be:

- Male median salary - £34,249.00
- Female median salary - £28,216.00

These statistics are important in suggesting that a large proportion of Plymouth residents may potentially be eligible to access the Warm Homes: Local Grant through the household income route, irrespective of their home being located within an IMD 1-2 postcode.

Current Business Need – Plymouths IMD 1-2 Postcode Areas:

Living in an IMD 1 or 2 postcode is another eligible route a resident can take to access the funding.

Index of Multiple Deprivation (IMD) is a countrywide measure for calculating the level of deprivation at a postcode level, a method that has been used since 1970. IMD 1 and 2 postcode areas are categorised as having the highest level of deprivation. The ranking is based on 7 x category measures:

1. Income
2. Employment
3. Education
4. Health
5. Crime
6. Barriers to housing & services
7. Living environment

According to the [DESNZ dataset](#), Plymouth currently has 1,705 postcodes that fall into IMD 1 or 2. These 1,705 postcodes equate to:

- 23,220 homes located in an IMD 1 postcode area

- 17,367 homes located in an IMD 2 postcode area
= 40,587 (33%) of Plymouth homes in total

Opportunity:

Plymouth City Council has the opportunity to operate the WH:LG, targeting the funding towards the many homes that are most in need, ensuring the thermal and energy performance of these households are improved to create a warmer, healthier internal living environment for the resident, whilst seeking to reduce their annual utility bills.

The WH:LG funds both insulation measures, as well as clean heat technology installations, so whilst improving the building fabrics heat retention capabilities, we are also seeking to improve the heating methods, making the home more energy self sufficient through measures such as solar pV to generate electricity, and should the scheme allow, to also install battery storage.

In working with each of these homes we will partner with supporting services to ensure that where a resident vulnerability or further need is identified, a need beyond that of the grant fund, we will signpost the resident into the relevant supporting service, ensuring they have access the full support services they may be entitled to.

We are already starting to generate partnership connections with other services beyond PEC Trusts fuel poverty advice team, partnerships such as with Devon & Somerset Fire and Rescue Service, to offer free fire safety visits, which could result in residents receiving free smoke and carbon monoxide alarms and help with safe exit plans from the home in the event of an emergency.

The Net Zero Delivery Team is also in discussion with both the Health Determinants Team and PEC's Fuel Poverty Advice Team to explore how we can most effectively evaluate the retrofit improvements delivered to a home, ensuring it does improve comfort and reduce heating costs, and if improvements identified, how we implement these to continually improve what is installed and how we work with the resident to ensure a long term noticeable benefit/ cost reduction is achieved.

Proposal:

Deliver the Warm Homes Local Grant

Central Government has committed to a Warm Homes Plan to upgrade five million homes over next five years to cut bills for families and deliver warmer homes to slash fuel poverty.

The Warm Homes: Local Grant is a government-funded scheme delivered by Local Authorities, such as ourselves at PCC, who will take the first steps towards delivering on the ambitions of the Central Governments Warm Homes Plan.

It will provide grants for energy performance upgrades and low carbon heating to low-income households living in the worst quality, privately owned homes in England to achieve energy bill savings and carbon savings, local supply chains, and skilled jobs for tradespeople.

The Net Zero Delivery Team proposes to deliver the Warm Homes Local Grant, over the 3-x year period commencing on 1st April 2025, running until 31st March 2028.

Investment in our Local Economy Opportunity

The Net Zero Delivery Team acknowledge that this grant fund value provides an opportunity to invest into our local economy of micro and SME businesses – those who are qualified and competent to deliver either the insulation and clean heat tech installations, or the enabling building works prior to retrofits commencing.

As such we will be utilising the [Energy Efficiency Dynamic Purchasing System](#), which we have recently entered into a 4 x year Contract Agreement with INCIC to use to procure suitable contractors.

Social Value Opportunity

All retrofit works must be delivered by a suitably qualified Installer who holds a PAS2030 certificate.

This certification standard is not as widely requested & required within Southwest as it is in other areas on England, namely the Southeast. Therefore we recognise there is a skills gap, and we are planning a route to upskill the city's local contractors to secure PAS2030 certification in order to be able to deliver works through the WH:LG.

We aim to engage with City College to support retrofit skills courses, and work with other organisations, such as Social Housing Providers, who also are seeking to upskill the local workforce to PAS2030 standard through their own social value agenda.

Why is this your preferred option:

This grant fund offers the opportunity to reach and significantly improve 206 x homes without requiring any direct financial investment from Plymouth City Council or the resident.

The additional benefits, beyond financial, are not yet known, but we aim to evaluate and record these as the scheme delivers.

Option Analysis:

Do Nothing Option	Do not participate in delivering the Warm Homes: Local Grant
List Benefits:	None
List Risk / Issues:	Resident homes continue to be heated ineffectively, and expensive to keep warm, residents remain in fuel poverty or in cold damp homes
Cost:	£3 million
Why did you discount this option	Not a viable option
Do Minimum Option	Smaller scale target set for the Warm Homes: Local Grant
List Benefits:	Targeted at the easiest to reach; possible to deliver deeper retrofits to the homes as more resource to focus on each individual property
List Risk / Issues:	Eligible residents that could have been supported aren't in receipt of the grant fund and thermal improvements, and remain in fuel poverty
Cost:	<£2 million
Why did you discount this option	Upon a review of cross organisational capacity to deliver this grant fund, PCC and PEC Trust agreed to seek funding for the maximum number of homes allowable within application rulings
Viable Alternative Option	None known
List Benefits:	
List Risk / Issues:	

Cost:	
Why did you discount this option	

Strategic Case:	
Which Corporate Plan priorities does this project deliver?	Make Plymouth a great place to grow up and grow old
	Green investment
	Making Plymouth a fairer, greener city, where everyone does their bit

Milestones and Date:		
Contract Award Date	Start On Site Date	Completion Date
28/02/2025	01/04/2025	31/03/2028

SECTION 2: PROJECT RISK, OUTCOMES AND BENEFITS				
Risk Register:				
Potential Risks Identified		Likelihood	Impact	Overall Rating
Risk	Poor quality workmanship/ installations causing long term detrimental issues to the home rather than improvements	High	Medium	Medium
Mitigation	PEC Trust and PCC track each stage of an Installers deliverable per home, with photo evidence, and seek an independent retrofit survey prior and post installation works are completed to instantly flag quality or remedial works required, which Installer must complete prior to payment. Separately PEC & PCC ensure Insurance Backed Guarantees are provided to the resident, and both PEC & PCC hold electronic copies should they need activating in future. All Installers are vetted to PAS2030/ PAS2035 standard, and all works must result in a TrustMark lodgement and certificate being generated, which acts as a further insurance policy for the homeowner	High	Medium	Medium
Calculated risk value in £ (Extent of financial risk)	£1 million	Risk Owner	Financial risk – Installer/ resident Asset risk - resident Reputational risk – PCC/ PEC/ Installer	
Risk	Condition of homes are poor and hazards are identified that need treating prior to works. Hazards are commonplace in homes, especially: <ul style="list-style-type: none"> • Asbestos • Electrical failures • Hoarding issues • Building/ roof repair works required The above are some examples, and must be managed firstly, which can add to the cost of works, delay the delivery and cause additional disruption to the	Medium	Medium	Medium

	resident. If the works are too disruptive the resident may withdraw from the scheme, which is a loss of the home, but also a risk that capital expenditure has been partly committed/ spent without the home completing its journey through the programme			
Mitigation	PEC Trust (Companies House # 11569012) are contracted through a Grant Agreement, as delivery partner, offer the relational support to the resident, handholding them throughout the grant, managing the contractors and bookings of the residents behalf, as well as keeping the resident informed at each stage of work, ensuring that levels of disruption are disclosed, and that resident agrees to allow the works to be actioned prior to retrofit works	Medium	Medium	Medium
Calculated risk value in £ (Extent of financial risk)	£500,000	Risk Owner	Financial Risk – PCC as aborted costs will be recorded within the revenue portion of the grant, which is capped at <15% of total grant expenditure	
Risk	Anti Competition Corruption – Installers price fixing & inflating the price of the product and installation costs	High	Medium	Medium
Mitigation	PCC to sign a NDA with DESNZ to access the mean average costs for each measure type, to track quoted works against industry average. PCC to collaborate with other LA's DESNZ to share breakdown of quoted and invoiced works for materials and labour, to highlight within a month if an unfair charge is being made PCC to procure installers through the Energy Efficiency Dynamic Purchasing Agreement to ensure multiple quotes are sought and appraised prior to contract being awarded. PCC will not enter into an exclusive contract agreement with any 1 x installer, to minimise PCC exposure to price inflations without a suitable exit strategy PCC will work with PEC Trust to modularise the delivery streams between surveyors, contractors, installers to ensure there isn't a monopoly over delivery, and to better control the cost of retrofit delivery per home PCC will manage an active Fraud Mgmt Plan and Risk Register to ensure there is a process to follow to record, report and manage any identified fraud or error issues	Medium	Medium	Medium
Calculated risk value in £ (Extent of financial risk)	<£300,000.00 10%	Risk Owner	Grant ineffectively spent on price fixing or inflated costs - PCC	
Risk	Asset Misappropriation – Installer invoices price for works not delivered, or for more products than were installed	High	High	High
Mitigation	PCC and PEC Trust will track the actual items installed in a property using photo evidence provided	Medium	Medium	Medium

	<p>by third party independent surveyor who will conduct a site visit to evaluate the quality or completeness of installation</p> <p>PEC Trust & PCC will provider scrutiny of invoices vs what's reported and photographed as having been installed at site. Operational working group will be established to provide assurance of invoice accuracy or return to installer if quantity/ product is missing</p> <p>PCC provide resident with a detailed grant offer letter at project commencement, listing items the resident will receive. Resident signs off a grant completion letter confirming they have received all items listed within Grant Offer Letter, or they have the option to raise product/ insulation missing – PCC and PEC Trust to then have evidence and audit trail to follow up with Installer.</p> <p>Annually Devon Audit Partnership will be contracted to provide an audit of expenditure transactions and grant delivery, to provide assurance of financial compliance and that grant terms are being adhered to.</p>			
Calculated risk value in £ (Extent of financial risk)	£250,000.00	Risk Owner	Grant inefficiently spent on fraudulent claims - PCC	

Outcomes and Benefits

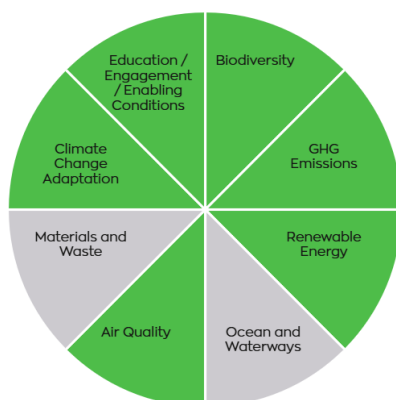
List the outcomes and benefits expected from this project.

Financial outcomes and benefits:	Non-financial outcomes and benefits:
<ul style="list-style-type: none"> • £3 million of grant funding directly invested into privately owned and rented homes across the city • Utilise the Energy Efficiency Dynamic Purchasing System to procure local micro and SME contractors to deliver the work • Reduction in grant recipient's annual household heating bills • £453,749.10 of revenue provided within grant to pay for PCC staff & delivery partner costs, as well as evaluate the outcomes of the retrofit • £50,000.00 direct revenue borrowing or cost to Plymouth City Council to subsidise revenue costs accrued in Financial Year One 	<ul style="list-style-type: none"> • Reducing the heating requirement to retain heat and maintain internal warmth to 21 degrees in habitable rooms for residents in receipt of the funding • Reduced heating need will reduce utility consumption • Reduced utility consumption (gas/ elec/ oil) will reduce annual carbon footprint/ home • Reduced annual carbon footprint will improve the Energy Performance Certificate for the home • Opportunity to generate a social value agenda to upskill local workforce to PAS2030 competency requirements and certification

SECTION 3: CONSULTATION

Does this business case need to go to CMT	Yes	Date business case approved by CMT (if required)	
Did a mandate go via CPOG/CPB	Yes	Date Capital Mandate approved by CPB	10/03/2025

Does this project involve a corporately maintained property	No
Details of impact of this project ie cost saving from this project or additional requirements	n/a

Climate Impact Assessment**Upload Climate Impact Wheel**

- 1** Long term or significant negative impact
- 2** Short term or minor negative impact
- 3** No impact or neutral impact
- 4** Short term or minor positive impact
- 5** Long term or significant positive impact

Summary of the anticipated impact of the proposal on the climate (including any proposed mitigations and impacts beyond 2030)

Overall, this project generates long term positive climate impact in the following areas:

- Biodiversity
- GHG Emissions
- Renewable Energy
- Air Quality
- Climate Change Adaptation
- Education/ Engagement/ Enabling Conditions

Currently there is not a directly positive climate impact to:

- Materials and Waste
- Ocean Waterways

However, there is the opportunity to use this scheme to steer an improvement in retrofit practise when and where it interacts with these 2 x areas to ensure continual improvement is driven forwards.

Confirm you have engaged with Procurement

Yes

Procurement route options considered for goods, services or works**Procurements Recommended route.**

Procurement has received and reviewed the business case and upon review it has been agreed that the procurement rules do not apply, as this project is to be delivered via grant agreements, and so it falls outside of the scope of the procurement rules.

It can therefore proceed without procurement engagement.

Who is your Procurement Lead?	Holly Golden
Is this business case a purchase of a commercial property?	No
If yes then provide evidence to show that it is not 'primarily for yield'	n/a

Which Members have you engaged with and how have they been consulted	Cllr Tom Briars Delve – briefing provided via initial Project Mandate submission on 28 November 2024 and approval confirmed on 19 December 2024.
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Confirm you have taken necessary Legal advice, is this proposal State subsidy compliant, if yes please explain why.	Legal will draft Grant Agreements flowing down specific responsibilities required as per the terms listed within the Memorandum of Understanding between DESNZ and PCC. Legal will ensure the Subsidy Control Regulations are applied to the Grant Agreements.
Who is your Legal advisor you have consulted with?	Alison Critchfield & Richard Hargreaves

Equalities Impact Assessment completed	Yes
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SECTION 4: FINANCIAL ASSESSMENT

FINANCIAL ASSESSMENT:

CAPITAL COSTS AND FINANCING

Breakdown of project costs including fees surveys and contingency	Prev. Yr.	24/25	25/26	26/27	27/28	28/29	Future Yrs.	Total
	£	£	£	£	£	£	£	£
Anticipated Capital Expenditure on eligible homes (excluding the Admin & Ancillary/ revenue expenditure)			350,756.30	1,123,139.30	1,097,349.30			2,571,244.90
Total capital spend			350,756.30	1,123,139.30	1,097,349.30			2,571,244.90

Provide details of proposed funding: <i>Funding to match with Project Value</i>								
Breakdown of proposed funding	Prev. Yr. £	24/25 £	25/26 £	26/27 £	27/28 £	28/29 £	Future Yrs. £	Total £
The Warms Homes Local Grant			350,756.30	1,123,139.30	1,097,349.30			2,571,244.90
Total funding			350,756.30	1,123,139.30	1,097,349.30			2,571,244.90

S106 or CIL	
Which alternative external funding sources been explored	None
Are there any bidding constraints and/or any restrictions or conditions attached to your funding	None
Tax and VAT implications	<u>VAT Implications</u> The project concerns grant payments to eligible homeowners. These payments will be outside the scope of VAT and so the Council will not incur any significant amounts of VAT in connection with this project and there will be no impact on the Council's partial exemption position.
Tax and VAT reviewed by	Sarah Scott
Will this project deliver capital receipts?	No

REVENUE COSTS AND IMPLICATIONS

Cost of Developing the Capital Project

Total Cost of developing the project	£25,000.00
Revenue cost code for the development costs	GL2265
Revenue costs incurred for developing the project are to be included in the capital total, some of the expenditure could be capitalised if it meets the criteria	No
Budget Managers Name	John Green



Ongoing Revenue Implications for Service Area

	24/25 £	25/26 £	26/27 £	27/28 £	28/29 £	Future Yrs.

Service area revenue cost							
Other Project Management cost			151,249.70	151,249.70	151,249.70		
Loan repayment							
Total Revenue Cost (A)			151,249.70	151,249.70	151,249.70		
Service area revenue benefits/savings							
Annual revenue income							
Total Revenue Income (B)			(151,249.70)	(151,249.70)	(151,249.70)		
Service area net (benefit) cost (B-A)			0	0	0		
Has the revenue cost been budgeted for or would this make a revenue pressure		<p>The grant terms allocates <15% of total grant funding to revenue, which is to cover the administration and ancillary costs connected to delivering the grant.</p> <p>In addition it is requested the Revenue Cost Centre - GL2265 Retrofit Grant Delivery - which currently holds un-ringfenced funding from previous grant schemes now closed, is agreed to be utilised to support the project delivery, mitigating any financial exposure or risk of PCC exceeding the grant term that <15% of total grant funding be spent on Admin and Ancillary/ Revenue costs.</p> <p>GL 2265 currently holds a budget of £196,880.00, which will provide a practical financial buffer should we experience any unanticipated costs or 'in-year' fund ruling</p>					
Which cost centre would the revenue pressure be shown		There will be no revenue pressure		Has this been reviewed by the budget manager		Yes	
Name of budget manager		John Green					
Loan value	£0.00	Interest Rate	%	Term Years	n/a	Annual Repayment	£
Revenue code for annual repayments		n/a					
Service area or corporate borrowing		None					
Revenue implications reviewed by		Emma White: I am happy to approve at this stage on the stated basis of the variations being fully funded by ringfenced grant and therefore no additional cost to PCC.					

Version Control: *(The version control table must be updated and signed off each time a change is made to the document to provide an audit trail for the revision and update of draft and final versions)*

Author of Business Case	Date	Document Version	Reviewed By	Date
N.Turvey	17/12/2024	v 1.0	Emma White	17/12/2024
	18/12/2024	v 2.0	Lynn Walter	18/12/2024
	18/12/2024	v 3.0	Sarah Scott	18/12/2024
	03/01/2025	v 4.0	Holly Golden	03/01/2025
	06/01/2025	v 5.0	Nicola Turvey	06/01/2025
	04/03/2025	V 6.0	Nicola Turvey	04/03/2025
	04/03/2025	V 7.0	Nicola Turvey	04/03/2025
	05/03/2025	V 8.0	Nicola Turvey	05/03/2025
	06/03/2025	V 9.0	Nicola Turvey	06/03/2025
	18/03/2025	V10.0	Nicola Turvey	18/03/2025
	15/04/2025	V11.0	Nicola Turvey	15/04/2025
	28/04/2025	V12.0	Nicola Turvey	28/04/2025
	14/05/2025	V13.0	Nicola Turvey	14/05/2025
	22/05/2025	V14.0	Nicola Turvey	22/05/2025
	18/06/2025	V15.0	Hannah Chandler-Whiting	18/06/2025

SECTION 5: RECOMMENDATION AND ENDORSEMENT			
Recommended Decision			
It is recommended that the Leader of the Council:			
<ul style="list-style-type: none">• Approves this Warm Homes Local Grant Business Case• Allocates £2,571,244.90 for the project into the Capital Programme, fully funded by The Warms Homes Local Grant• Authorises the procurement process• Delegates the award of the contract to Service Director for Strategic Planning & Infrastructure			
[Name, Portfolio]		Service Director	
Either email dated:		Either email dated:	18.06.2025
Or signed:		Signed:	
			
Date: 30.06.2025		Date: 18.06.2025	