

Warm Homes: Social Housing Fund

Warm Homes: Local Grant

November '24 Pre-Tender Market Engagement

Intros

- [Holly Allaway](#): Assistant Commercial Lead, DESNZ Warm Homes
- [Shaun Garvey](#): Programme Director, Warm Homes: Local Grant (WH:LG)
- [Caroline Withey](#): Programme Director, Warm Homes: Social Housing Fund (WH:SHF)
- [Sarah Cassidy](#): Senior Project Manager, WH:LG
- [Rodrigo De Oliveira](#): Project Manager, WH:SHF

Agenda

Section	Presenter	Time	Duration
Welcome, Meeting Protocol, Transparency	Holly Allaway	11:00-11:05	5 mins
Updated Indicative Procurement Timelines	Holly Allaway	11:05-11:10	5 mins
Post September PTME Updates	Shaun Garvey Caroline Withey	11:10-11:15	5 mins
Reflections on Requirements Feedback	Rodrigo De Oliveira Sarah Cassidy	11:15-11:35	20 mins
Changes to Commercial Model / Approach	Holly Allaway	11:35-11:45	10 mins
Next Steps & Q&A	Holly Allaway	11:45-12:00	15 mins

Meeting Protocol

- The session will be recorded and made available to suppliers.
- Please mute your microphone during the presentation.
- There is a Q & A session at the end of the presentation; please use the Slido link provided to submit, and vote for, questions. Due to time limitations, questions will be addressed in order of popularity.
- Please send any commercially sensitive questions to htcommercial@energysecurity.gov.uk
- It is the Department's sole discretion whether questions received are commercially sensitive; all relevant non-commercially sensitive questions and answers will be shared with potential bidders to ensure a fair and transparent process.



Department for
Energy Security
& Net Zero

Slido

<https://app.sli.do/event/8nvoBGZY8rmYBaHYXb3AwU>

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Transparency (Public Contract Regulations 2015)

- The purpose of this exercise is to validate the Department Project Team's thinking and development of the potential Delivery Partner 2 (DP2) procurement through market considerations and the following slides represent the thinking on this.
- Feedback from interested stakeholders will be considered before the approach is finalised and taken through programme governance.
- The approach described within this document may be subject to change prior to ITT Launch so no assumptions from details discussed today can be considered in relation to the tender process.
- Finalised details will be contained within the tender ITT document which we aim to publish in **Mid-January**. This date may change, and any changes will be communicated to the market.
- Nothing discussed or questioned today will contribute to the evaluation of the tender; it will be treated as a separate exercise to the tender evaluation and will **NOT** be weighted with any relevance to the bidders' answers to the tender.

Indicative Procurement Timetable

Procurement Activity	Date
Prior Information Notice issued	4 th September 2024
Questionnaire Issued	17th September 2024
1st Group Webinars	17th & 20th September 2024
Supplier 1:1 Sessions	23rd – 27th September 2024
2nd Group Webinar	8th November 2024
<i>ITT Launch</i>	<i>Mid-January 2025</i>
Deadline for bid submission	Late February 2025
Evaluation & Moderation Concludes	Early April 2025
Contract Award Date	Early July 2025
Indicative Contract Signature & Start of Mobilisation	July 2025
Contract Go-Live and End of Mobilisation	September 2025

Key Changes:

The intended ITT publication date has moved from the end of November to mid-January.

This is to ensure DESNZ has sufficient time to digest (and where appropriate incorporate into requirements) the extensive feedback captured in the PTME. It also avoids a requirement to bid over the Christmas holiday period.

Please note:

All indicative dates and activities listed are pending subject to receiving departmental, Cabinet Office and ministerial approval.

DESNZ reserves the right to change or halt the procurement process at any stage.

Post September PTME Updates

In September 2024, the Department held two pre-market engagement events to promote the upcoming opportunity for a Delivery Partner to support the work of two energy efficiency schemes:

1. The Local Authority Retrofit Scheme (LARS)
2. The Social Housing Decarbonisation Fund (SHDF).

The Warm Home plan was allocated £3.4bn in the recent spending review; with £1.8bn allocated across 3 years to the fuel poverty schemes.

Both schemes have since been renamed:

The local authority retrofit scheme is now known as **“Warm Homes: Local Grant” (WH:LG)**.

Funding guidance was issued by Government on 23rd September; the Expression of Interest (Eoi) window opened 16th October and will close at 23:59, 1st December 2024.

The Social Housing Decarbonisation Fund (SHDF) is now known as **“Warm Homes: Social Housing Fund Wave 3” (WH:SHF W3)**.

Wave 3 applications opened 2nd October and will close at midday on 25th November 2024.

Application Process Management

Summary of Service Package

Outlines the potential requirements for managing and executing the application and assessment stages of the Schemes with key objectives of:

1. Ensuring that only Projects that meet the Schemes' minimum criteria thresholds and are deemed deliverable are awarded a Grant.
2. Ensuring that the process for assessing and awarding Grants is completed in a fair, transparent, and timely manner.

As the schemes are different in nature, it will be essential to process the requirements and policies differently.

Please note: inclusion of the assessment of initial applications for any future waves of WH:LG and/or WH:SHF within DP2 scope has not yet been confirmed.

Supplier responsibilities	Mobilisation Period (approx. 12 weeks)	Delivery Period (once onboarded)
WH: LG	<ul style="list-style-type: none"> - Develop in-depth understanding of Scheme and Memorandum of Understanding (MoU) obligations utilising policy guidance and Scheme Playbook (to be provided by the Buyer) - Review Grant Recipient EOI applications (Buyer led), Mid-Mobilisation Reviews and Delivery Assurance Checks that have been completed prior to Onboarding. - Work with existing Suppliers and the Buyer to understand delivery progress, forecasts and GR performance to date. 	<ul style="list-style-type: none"> - Manage the Delivery Assurance Check Process - Manage Grant Recipient monthly engagement - Manage the Batch Assessment process: assess and approve batch applications submitted by the Grant Recipient
WH: SHF	<ul style="list-style-type: none"> - Develop in-depth understanding of Scheme and GFA conditions, and policy determinations. - Review handover pack of W3 Applications and Early Delivery documentation/stats to develop knowledge of GRs' initial baselines, delivery plans, changes and performance to date. - Design end-to-end process for the management of Phase Requests in consultation with the Scheme, based on the arrangements employed during Early Delivery. Submit it for the Buyer's approval. 	<ul style="list-style-type: none"> - Implement and manage the Phase Requests Process (i.e., support GRs to produce quality Phase Requests, assess detailed plans for each phase of Challenge Fund GRs' delivery, recommend on approvals to unlock GR access to grant funds for each phase, update initial baselines with phase details, monitor and report on the delivery of phases, etc.). - Provide full assessment services for additional rounds of Applications, if any takes place (i.e., provide assessment team, carry out assessments and moderation, recommend on assessment decisions, etc.)

Application Process Management

Key Changes from w/c 16th September:

- Greater clarity on cross-cutting roles and responsibilities, including detailed and specific process maps to enhance understanding of interdependencies between Supplier and the Department.
- Greater clarity and simplification of the Grant Recipient (GR) journey to outline roles and responsibilities of the Supplier during the Mobilisation phase until they are onboarded. This includes the Mid-Mobilisation Review and the Delivery Assurance Check process.
- These processes will assess Grant Recipient readiness to begin delivery and draw down further funding via the Batch Process.
- Expanded detail on Phase Request Process – outline of info/metrics to be assessed, breakdown of Supplier's activities for the management of the end-to-end process, outline of reporting and governance requirements (monthly + quarterly).

Application Process Management (R&R)

Department

- Application/EOI process management
- MoU/GFA, DSA, and NDA issuing and signing
- Governance and Payments
- Assessment criteria and assessor training - where additional round of applications takes place during term of the contract

Supplier

- Review and familiarisation with documentation and systems to enable takeover of the relationship management with GRs.
- Managing and facilitating DACs, supporting GRs through the process and providing recommendations and escalations to the Buyer.
- Supports GRs in batch submissions, application revision and clarifications. Escalations, tracking trends, approve/reject applications and informing both GRs and buyer of outcomes.
- End-to-End management of Phase Requests Process for Challenge Fund GRs, including support for development of submissions.
- Application assessment services - where additional round of applications takes place during term of the contract.

Grant Recipient

- Submit the required accurate and timely submissions.
- Adhere to and meet schemes criteria and requirements in line with the policy guidance, MoU and GFAs.

Project Performance and Management

Summary of Service Package

Outlines the requirements for the provision of an oversight framework to ensure the effective programme management of the Schemes and GR Projects.

This service package will involve designing, implementing, and managing operational structures, processes and procedures for the coordination and integration of all Supplier responsibilities and activities, across all service areas.

The supplier will forecast and drive delivery by:

- Monitoring, controlling and reporting on performance and trending of outputs and outcomes;
- Managing risks and issues;
- Building and supporting GR capability
- Identifying and mitigating early indicators of underperformance, supporting GR development and implementation of remediation plans as necessary;
- Identifying and managing necessary change;
- Maximising and tracking overall benefits.

Project Performance and Management

Key Changes from w/c 16th September

- Recognition of varied GR capability, capacity and maturity levels; acknowledgement of subsequent differences in breadth, complexity and engagement demands for the provision of support to different GRs and schemes.
 - Clarity on the distinct nature and purpose of BAU/regular support activities, Direct Advisory Support and Remediation Support.
 - Definition of Direct Advisory Support categories (i.e., Technical Compliance, Project Management Capability and Specialist support).
 - Clarity on Supplier's delegated authority for prompt deployment of Direct Advisory Support, where appropriate.
 - Recognition of potential need for SME resource to address SPoC capability gaps in the provision of enhanced support to GRs.
- Enhanced breakdown of BAU/regular engagements and support activities required as part of the monthly cycle to guide and monitor GRs.
- Enhanced description of SPoC role; clarity on balance of support, challenge and monitoring responsibilities, as well as on essential skills and experience required:
 - Inclusion of goal-oriented scenarios on the provision of support for cases of varying complexity, outlining the behaviours/actions expected from SPoCs in different cases and drawing on real examples of past Scheme experience/challenges.

Project Performance and Management (R&R)

DEPARTMENT (BUYER)

- Sets out the principles that will inform the programme management of the Schemes and GR Projects.
- Approve processes designed by the Supplier before implementation.
- Hand over templates, records and details associated with all interim processes implemented during Early Delivery.
- Approve Direct Advisory Support and Remediation Plans.
- Advise the Supplier on Scheme conditions and policy determinations.

SUPPLIER

- Design, implement and manage an oversight framework for overall programme management, adapting processes and products to the requirements of each Scheme.
- Provide dedicated SPoCs for each GR Project to lead all BAU/regular engagement and support with GRs, as well as all other monitoring and control activities (e.g., quality assurance of regular reporting returns).
- Provide administrative services, assessments and reviews, performance and financial monitoring, and reporting on outputs, outcomes and benefits.
- Conduct monthly Delivery Confidence Assessments, and Performance Status evaluation of every GR Project, including management of associated governance forums.
- Assess need for and deploys Direct Advisory Support to address early indication of GR Project underperformance.
- Monitor need for and supports GR development of Remediation Plans to address evidenced consistent underperformance, including deployment of remediation support.
- Conduct quarterly Monitoring and Performance Patterns and Trends Reviews, and annual Benefits Reviews and Strategic Partners (SHF only) Reviews, including management of associated governance forums and production of associated reports.

GRANT RECIPIENT

- Engage with SPoCs for all regular monitoring, communication and queries.
- Comply with grant conditions and policy determinations.
- Adhere to regular reporting return conditions (timelines, completeness, quality).
- Collaborate fully with Delivery Confidence Assessments and Performance Status evaluations.
- Produce and implement Remediation Plans, where required.

Change Control of GR Projects

Summary of Service Package

Outlines the requirements for the provision of a Change Control Process to ensure that changes to GR Project baselines and delivery plans are managed effectively and transparently.

This requirement will involve driving a culture of change control as last resort, acting as a critical friend to advise and support Grant Recipients to develop and implement early mitigations to minimise the number of required changes, managing the risk of need for change.

The supplier will manage necessary change by:

- Advising and supporting Grant Recipients on the production of high-quality Change Requests, according to Scheme conditions and defined quality criteria.
- Designing and implementing a Quality Assurance (QA) process to validate change request quality before progressing on to decision-making stage.
- Managing the end-to-end process to approve/reject Change Requests (i.e., receipt, acknowledgement, quality assurance, review and evaluation, decision-making within delegated thresholds, escalation with recommendation for decision-making of cases exceeding delegated thresholds, outcome notification, and management of records).
- Managing all change control forums, including production of necessary documentation and artefacts.
- Developing and maintaining a surge capacity plan for the provision of flexible and scalable resource levels to manage fluctuations in the volume of change requests.
- Monitoring the performance of the Change Control Process and tracking change patterns and trends, utilising reported findings to inform continuous improvement.

Change Control of GR Projects

Key Changes from w/c 16th September

- Enhanced definition of quality standards for Change Requests that will inform supplier advice and support, and quality assurance activities.
- Recognition of potential need for SME resource to address SPoC capability gaps in the quality assurance and evaluation of Change Requests.
- Recognition of process stages outside the supplier's control to inform the determination of turnaround times for specific actions.
- Clarity on the distinction of steps for the processing and decision-making for change requests within delegated thresholds.
- Clarity on monthly and quarterly reporting requirements and associated metrics.

Change Control of GR Projects (R&R)

Department (Buyer)

- Set tolerance levels and associated trigger points for intolerable change for each Scheme and funding model – Policy red lines.
- Set thresholds for the Supplier's delegated authority.
- Defines escalation routes and required governance structure.
- Decide on change requests that exceed Supplier's delegated thresholds.
- Hand over templates, records and details associated with change requests processed during Early Delivery.

Supplier

- Drive a culture of change control as a last resort in the management of the change control process.
- Understand GR Project conditions and risks to advise, challenge, and influence GRs to minimise instances of change.
- Provide guidance, advice, support, and clarification to GRs regarding all aspects of the change control process, including on the production of change requests.
- Ensure high-quality change request submissions which make a clear case for change (i.e., include comprehensive rationale and impacts) to inform effective decision-making.
- Evaluates all change requests, taking decision within delegated thresholds, and escalating recommended outcome for decision by the Department where thresholds are exceeded.
- Monitor the performance of the change control process and change patterns and trends.
- Conduct monthly and quarterly reviews against defined metrics, including management of associated governance forums and production of associated reports.

Grant Recipient

- Manage risks under the Supplier's advice to minimise need for change.
- Understand Policy red lines which inform change control decisions.
- Produce high-quality change requests under the Supplier's advice.
- Collaborate fully with the change control process, further developing change requests when advised to by the Supplier.
- Commits to delivery against updated baselines and targets as per the outcomes of agreed changes.

Grant Spending Compliance and Forecasting

Summary of Service Package

This service is set up primarily to ensure that all Grant Recipients comply with the Scheme's Grant Spend conditions and processes.

This includes:

- Monitoring the spend of allocated funding in line with specific scheme requirements;
- Working with GRs to confirm receipt of payment.

The payment processes for the schemes vary due to the distinct mechanisms used to award funding; consequently, the model of support used for each will differ.

Key Changes from w/c 16th September

Greater clarity regarding the distinct payment processes for each scheme:

1. Step-by-step process for individual scheme payment claim procedures and associated SLAs
2. Scheme specific reporting requests, payment reconciliation and evidence check requirements
3. Spend and forecasting requirements and how these link with other service package requirements



Grant Spending Compliance and Forecasting R&R

Buyer (Department)

- The decision-making authority, endorsing payment decisions, and managing transfer of funds to GRs upon completion of the relevant financial process

Supplier

- Receive drawdown requests, process grant claims reviewing completeness and quality of submissions, and issue recommendation to the Buyer to trigger payments.
- Acts as main point of contact for any payment and claims processes, ensuring all GRs comply with schemes Grant spend conditions and processes
- Sets out evidence requirements, assess GR financial forecasts, financial summaries/spend, carries out sample/full evidence checks of GR spending
- Conducts reconciliation of grant payments, ensuring evidence provided is appropriate to confirm eligible spend, advising GRs on re-submission where evidence shared is unclear, ambiguous or insufficient.
- Identifies inconsistencies and escalates to Buyer, including the provision of monthly scheme-level financial forecast.

Grant Recipient

- Comply with Scheme spend conditions and processes.
- Provide timely and accurate spend requests and reports to enable payments.

Fraud, Error and Compliance Management

Summary of Service Package

This management function seeks to minimise mis-spend of schemes funding and ensure compliance with scheme policy rules.

The service will aim to deter, prevent, detect, and resolve cases of fraud, error, and non-compliance, assuring these functions by driving corrective action and improvement as needed.

The function will ensure public funds are correctly managed in line with the Department's policy to tolerate no more than 2% losses to residual fraud, error and non-compliance (i.e. losses that remain even after the application of controls).

Key Changes from w/c 16th September

- Greater clarity on the roles and responsibilities between the Buyer, Supplier and the Grant Recipient
- Clearer expectations of the escalation and governance processes
- Greater clarity on levels and percentages of evidence reviews required



Fraud, Error and Compliance Management R&R

Buyer (Department)

- Deciding Authority, providing strategy and setting tolerances and approving prosecution cases.
- Conduct assurance monitoring of Supplier's fraud management processes.

Supplier

- Assuring the strategy by running a fraud, error, and compliance function, using all appropriate preventive data analysis techniques. providing insight conducting spot/eligibility checks, due diligence and sign offs
- Conduct own fraud management and controls of bids, applications, Change requests, payment submissions etc. including sanctions and debt recovery

Grant Recipient

- Report cases of fraud, error and non-compliance
- Take steps to prevent and manage fraud in their supply chain

Grant Recipient Knowledge Management and Capability Building

Summary of Service Package

This service package outlines:

- The coordination of information and knowledge sharing within, and across, the WH:LG and WH:SHF stakeholders.
- The activities related to the provision of a forum (i.e. Learning Communities) where delivery challenges, resolution strategies and best practice will be disseminated. The intent is to optimise scheme delivery by leveraging learnings across all Grant Recipients.
- The split of roles and responsibilities for the management of the Learning Communities between the schemes, the existing accountable partner (Technical Assistance Facility – TAF2) and the DP2 Supplier.
- The principles which will inform communications with Grant Recipients and the wider publicity of the Schemes.

Key Changes from w/c 16th September

The Supplier will be required to:

- Develop in-depth understanding of the TAF 2 resources library to signpost Grant Recipients to existing advice and support products (where appropriate), leveraging lessons learnt and avoid duplication of efforts.
- Support the development and running of the Learning Communities function, ensuring knowledge is shared across GRs.



Grant Recipient Knowledge Management and Capability Building R&R

Buyer (Department)

- Sets out the communications strategy for the management of the Learning Communities.
- Administrative and operational management of specific elements (Learning Communities).
- Retain control and ownership of all service-related outputs including approval responsibility for any publicity of the schemes.

Supplier

- Provide all required administrative and engagement support.
- Contribute to the building, management and maintenance of a knowledge base of GR delivery learnings.
- Capture, share, and disseminate learnings with both the Buyer and the Grant Recipient community, according to the strategy set by the schemes.
- Provide, monitor and operationally manage a customer support inbox function to receive and address Grant Recipient queries/questions.

Grant Recipient

- Communicate learnings, knowledge experiences and outputs for dissemination in knowledge management forums.
- Participate in and contribute to knowledge management forums to drive successful delivery.

Technology, Data Collection, Visualisation and Reporting

Summary of Service Package

This service package outlines the Supplier's role in collecting, processing, and reporting data from Grant Recipients about the Schemes.

The Buyer will provide access to a **Data Management System** which will be used by Grant Recipients and the Supplier to collect, process and report data about the Schemes.

The Supplier will **provide ongoing support** to Grant Recipients in how to use all data management and reporting systems to provide an accurate overview of Scheme and Project performance.

Key Changes from w/c 16th September

- The intended use of the provided systems and the Supplier responsibilities have been made explicit.
- Set out clear expectations of the Supplier and roles and responsibilities across the delivery model.
- The Supplier should assume that the Data Management System, CRM and Automated Batch Solution (WH:LG only) will be provided by the Buyer.
- Initial CRM capability will now be provided by the department and any specific requirements requested by the successfully awarded Delivery Partner will be considered post contract award. This will be used by both the Buyer and Supplier to record day-to-day interactions with Grant Applicants and Grant Recipients and facilitate operational aspects such as Change Control.

Technology, Data Collection, Visualisation and Reporting (Key Roles & Responsibilities)

Buyer (Department)

- The Supplier should assume that the Data Management System, CRM, and Automated Batch Solution (WH:LG only) will be provided by the Buyer.
- The Buyer will train the Supplier on how to use the systems during the mobilisation phase.

Supplier

- The Supplier will ensure that Grant Recipients submit their monthly reporting on time and adhere to the Data Dictionary requirements provided by the Buyer and provide support with technical queries.
- The Supplier will amend baseline data as required, carry out analysis of project data and submit monthly Delivery Confidence Assessments using the DMS.
- The Supplier will complete Data Quality Assurance on the project data provided by the Grant Recipients to ensure accurate reporting to the Buyer.
- The Supplier will ensure that all Grant Recipient engagement and project milestones are recorded in the CRM.
- The Supplier will use project data to provide a monthly report to the Buyer on scheme performance, including risks and mitigations to address underperformance for use at the Monthly Review Board with the Buyer.

Grant Recipient

- The Grant Recipient will use the DMS to submit a monthly report by the 10th working day of the month in line with the Data Dictionary requirements as part of their obligations within the Memorandum of Understanding (WH:LG) and Grant Funding Agreement (WH:SHF)

Scope of Contract

*This information is subject to final governance and assurance processes and **may be subject to change**.*

Funding is also dependent on the outcome of Spending Reviews; this may impact the delivery duration of WH:SHF & WH:LG.

Element	Detail
Contract Duration	3 + 1 + 1 years
Contract Value	c. £90m
Audience supported	Local Authorities, Housing Associations, Net Zero Hubs, Combined Authorities (and other similar relevant bodies)
Dept Schemes Supported	WH:SHF, WH:LG (other schemes <i>may</i> be included at a later date)

Route to Market & ITT

- Following positive market feedback, the confirmed route to market is the Crown Commercial Services' (CCS) Fund Administration & Disbursement Services (FAADS) DPS, reference RM6322.
 - *DESNZ reserves the right to alter the route to market, and Suppliers will be informed of any changes.*
- Eligible suppliers can join the DPS at any time, however CCS advise a minimum lead time of c.15 working days to onboard an eligible supplier.
- For any consortium bids, the leading member of the Consortium must be registered as a DPS Supplier against the Full Programme Management filter.
- The competition will be run using the Department's e-sourcing portal Jaggaer - <https://beisgroup.ukp.app.jaggaer.com/>
- Conversations addressing what information could be provided in the ITT document suite and data room to address incumbent advantage are ongoing; we continue to seek feedback from the market.

Pricing Approach – Exploratory

Requirement	Pricing Approach
Application Process Mgt	<ul style="list-style-type: none"> Fixed price as part of mobilisation cost - develop and implement processes required for APM for both schemes Incentive Pot – GR "first time" progression through project gateways (TBD) via evidence-based outcome recommendation accepted by DESNZ triggers a release of incentive pot.
Project Performance & Mgt	<ul style="list-style-type: none"> Fixed price per project with volume-based discount banding. Option 1 - Projects tiered by anticipated level of support required per project (High-->Med-->Low) Designation feeds into the amount SPoCs can autonomously draw down from discrete funding pots for each Direct Advisory Support Category (Technical, Project Management, Specialist). Additional funds available by exception in T&M format Option 2 – 3 DAS pots are not split by GR; Supplier has access to the full DAS pot, and can allocate to GRs at their discretion. Both - Gainshare - If the pot for each GR/DAS is not used by end of contract, a x% of pot given to Supplier. Gainshare Remediation Pot – remediation funds available by exception in T&M format. If pot not used by end of contract, x% of pot given to Supplier.
GR Change Control	<ul style="list-style-type: none"> Fixed price per change, varying depending on scheme Capped T&M contingency budget for varying demands Gainshare Change Control Pot – change control funds available by exception in T&M format. If pot not used by end of contract, x% of pot given to Supplier
Grant Spending Compliance & Forecasting	<ul style="list-style-type: none"> Falls within fixed price outlined in Project Performance and Management

Pricing Approach – Exploratory

Requirement	Pricing Approach
Fraud, Error & Compliance Mgt	<ul style="list-style-type: none"> • Fixed monthly cost for regular assurance • One-off fixed costs for site visits • Remediation Pot TBD
GR Knowledge Management	<ul style="list-style-type: none"> • Falls into fixed monthly PMO price and overall fixed price for Project Performance and Management.
Data Collection, Visualisation & Reporting	<ul style="list-style-type: none"> • Maintenance and hosting of IT systems – fixed price • Changes to IT Systems (supplier led) – gainshare model: savings generated through efficiencies result in x% of saving awarded to supplier. • Changes to IT systems (buyer led) – capped T&M or fixed cost agreed during impact assessment.
Misc	<ul style="list-style-type: none"> • Fixed monthly PMO costs as a % of overall fixed price for Project Performance and Management • Fixed one-off cost for Mobilisation.

Performance Framework

Indicative Main Areas of Performance Interest

KPIs

GR/Customer Satisfaction with the quality of service provided by the Delivery Partner (as surveyed by the Buyer)

Scheme Delivery – Number of homes completed for each scheme (within a % of an agreed baseline)

Staff Retention – Percentage of DP ‘Single Point of Contact’ Roles Retained over a period (retention rate above X, to support continuity of relationships and service for grant recipients)

Remediation Avoidance (e.g. minimising GRs requiring remediation work, minimising time spent in remediation)

SLAs

Timeliness of batch application decisions for GRs

Timeliness of Help Inbox responses

Timeliness of Delivery Confidence Assessments completed each month

Timeliness of Change Control decision making (or escalation to the Buyer where decisions are outside of delegated authority)

Timeliness & Completeness of Regular Reporting to the Buyer

Timeliness & Completeness of GR Reported Data

Next Steps

1. Join RM6322 if you are not on the DPS and select “Full Programme Management” filter.
2. Email htthcommercial@energysecurity.gov.uk with any additional and/or commercially sensitive questions.
3. Get ready for the ITT launch in Jan 2025!

Q & A

<https://app.sli.do/event/8nvoBGZY8rmYBaHYXb3AwU>

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