

A photograph of a row of stone houses with dormer windows under a blue sky. The houses are built with light-colored stone and have white-framed dormer windows. A chimney with red pots is visible on the roof. The sky is a clear, bright blue.

# WH:SHF Wave 3 Self-conducted evaluation introductory workshop

**Hosted by IFF Research**  
DESNZ's independent evaluation partners

This session will be recorded and circulated to grant recipients unable to attend



# WH:SHF Wave 3 Aims & Objectives



WH:SHF Wave 3 builds on the previous waves of the programme, continuing to support social housing landlords to deliver retrofit at scale and encouraging the uptake of low carbon heating for the benefit of their residents.



## Fuel poverty

Reduce the number of homes in fuel poverty.



## Carbon emissions

Reduce CO<sub>2</sub> emissions from social housing to contribute to UK's Net Zero target by 2050.



## Resident benefits

Improve the comfort, health, and wellbeing of social housing residents.



## Green economy

Support thousands of jobs in the retrofit sector and build economic resilience.



## Sector development

Create growth in the retrofit supply chain capacity and capabilities and upskill social housing landlords in retrofit.



# Evaluating WH:SHF Wave 3

Evaluation is important to assess the outcomes of Wave 3, to understand how effectively it is being implemented, and to help to maximise its outcomes.

IFF are leading the overall evaluation on behalf of the Department for Energy Security and Net Zero (DESNZ).

## Who is involved?

### Evaluation support team



### Evaluation partners



### Commissioner



Department for  
Energy Security  
& Net Zero





# What is an evaluation?

- **Evaluations assesses the design, implementation, and outcomes of an intervention**, looking at how it works, for whom, and why
- **They identify areas for improvement** while estimating overall impacts and cost-effectiveness

## Why evaluate?

### Learning:

- Manage risks and uncertainties in interventions
- Improve decisions and performance through evidence
- Understand what works, for whom, and when
- Inform the design of future interventions
- Demonstrate impact and effectiveness for accountability and reviews

### Accountability:

- Demonstrate impact and effectiveness to stakeholders
- Support transparency and respond to scrutiny





# WH:SHF Wave 3 Evaluation

## Part 1

### Core Wave 3 Evaluation

#### Qualitative Interviews

Technopolis will be conducting qualitative research with key scheme stakeholders (e.g. with GRs)

#### Scheme Data Analysis

Analysis of secondary data (e.g. application and monitoring data)

#### Overall Analysis

IFF will synthesise and analyse all data, including Part 2 data

One key difference with Wave 3 compared to previous waves is that some grant recipients have responsibility for **specific data collection, analysis, and reporting activities**.

## Part 2

### Self-Conducted Evaluation by Grant Recipients

#### Group A - Outcome Indicators

Data collection, analysis, and reporting on **three** categories of **quantitative** outcome indicators

**Mandatory for Strategic Partners**

#### Group B - Additional Evaluation Topics

Data collection, analysis, and reporting on additional evaluation topics.

No prescribed methodology, grant recipients **propose own** data collection and analysis approaches



# Why self-conducted evaluation?



## Upskilling

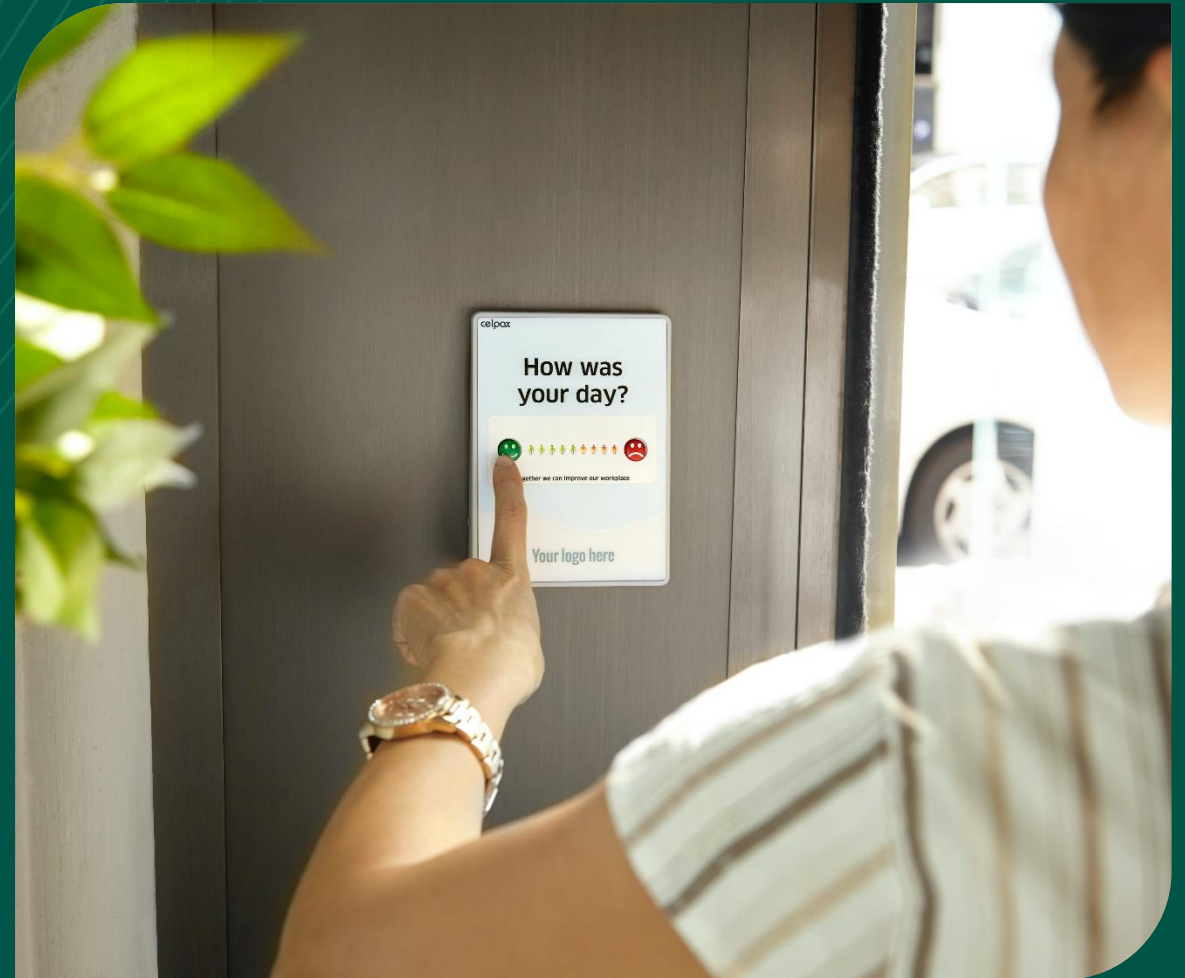
- Self-evaluation gives you the chance to develop the skills and experience needed to monitor and understand the effectiveness of your retrofit delivery.
- This also builds your ability to carry out future evaluations independently and strengthens the quality and impact of your projects.



## Shaping Future Schemes

- Participating in self-conducted evaluation also gives you the opportunity to shape future scheme design.
- The insights you gain can highlight improvements to Wave 3 delivery processes and contribute to developing more effective funding and delivery models for social housing retrofit.

# Evaluation activities explained





# Group A activities

Mandatory for  
Strategic Partners



**A1**

## Social housing landlord capacity and capability

- Tracking growth in in-house retrofit roles and training
- Form completed by grant recipients



**A2**

## Supply chain capacity and capability

- Tracking roles, training and capacity across the supply chain
- Survey completed by your supply chain organisations



**A3**

## Resident questionnaire

- Measuring satisfaction, warmth/comfort, bills and health post-installation
- Survey completed by your residents

# A1: Social housing landlord capacity and capability

## Assesses how Wave 3 helps to build landlords' in-house retrofit skills and capacity.



- **When:** Annual GMS return in the (opens November; 4 weeks to submit). Baseline in Y1; update each year.



- **Method:** Complete the A1 GMS form: this includes questions focusing on roles/FTEs within retrofit (incl. new hires & apprentices), training & accreditations, and knowledge-sharing. Totals and year-on-year change are auto-calculated.



- **Who:**
  - Grant recipients: Gather inputs (HR data/training data).
  - IFF Research: Review submissions, provide helpdesk, check for inconsistencies and confirm acceptance.
  - DESNZ: Hosts GMS



For organisations in a consortium, each partner organisation will complete their own response using a template provided by IFF.

**The consortium lead is responsible for reviewing, aggregating and submitting the data.**

# A2: Supply chain capacity and capability

## Assesses growth and readiness across the retrofit supply chain



- **When:** Annual survey sent by IFF to supply chain organisations (November). Grant recipients will be required to submit the supplier contact list by the 10<sup>th</sup> October.



- **Method:** IFF to email a short survey to each nominated organisation. Questions cover: retrofit roles/FTEs (incl. new hires & apprentices), delivery model, retrofit start date, training & accreditations and delivery confidence.



- **Who:**
  - Grant recipients: Provide a contact list via the IFF Excel template (Org name, Contact name, Email, Role/function category, Lead/Sub-contractor, Project/lot, Region).
  - Supply chain organisations: Gather inputs and complete the A2 survey.
  - IFF Research: Supply contact list template & guidance, send invites and reminders, helpdesk, validate responses.

# A3: Resident questionnaire

## Captures residents' experience and perceived benefits from the installations.



- **When:** Survey residents up to a year post-installation. Run as a single wave, phased, or rolling (e.g. quarterly).



- **Method:** Use DESNZ question set (exact wording) + required demographics. Any mode or embed in PAS2035 or TSM data collection.
  - Collect required demographics (age, gender, income, ethnicity, disability).
  - Achieve minimum sample and minimise bias (document sampling).
  - Return anonymised Excel incl. time-since-install; note incentives and any external contractor.



- **Who:**
  - Grant recipients: run survey & upload anonymised data in Excel (all consortium members)
  - IFF Research: provides templates/sampling advice & validates files.



# Group B activities

## Optional evaluation topics

Self-directed evaluation topics give you the flexibility to focus on what is most relevant and valuable for your organisation to gain insights on. The methods are up to you, and could include: interviews, focus groups, case studies, building performance monitoring.

IFF provides guidance, advice and light-touch QA for up to three topics.

### Delivery effectiveness

Did projects deliver as intended? Success factors, barriers & external influences.

### Targeting & suitability

Were the right homes/measures targeted?  
Fabric needs for low-carbon heat; impact on fuel poverty.

### Design & value for money

Did Wave 3 design/funding enable delivery at scale and Value for Money?

### Sector readiness (post-2030)

How has Wave 3 prepared landlords and the retrofit sector for future investment?

### Energy, carbon & bills

Environmental and cost benefits (in-use monitoring only; explore by archetype/measure mix).

### Resident benefits (deep dive)

Beyond A3: satisfaction, comfort, health/wellbeing and behaviour change.



Celebrating **60** years of  
IFF Research

# Your evaluation partners: IFF Research





# IFF Evaluation Support team

What support will IFF Research provide?



**Initial guidance sessions** on the evaluation requirements and processes.



**Lesson sharing sessions** which grant recipients can learn from each other's self-evaluation experiences.



**Drop-in sessions** available for more tailored advice.



**Guidance materials** providing detailed written methodological guidance.



**One-to-one support** through regular keep in touch sessions with IFF Research.



**Quality assurance** data your organisation collects to verify its quality.



# Evaluation Liaison Officers

You will be provided with ongoing technical support from IFF Research through your Evaluation Liaison Officer. They can also signpost you to additional support that we will have available.

## What support will your evaluation liaison officer provide?



**One-to-one meetings**



**Fielding day-to-day queries by email**



**Answering logistical queries**



**Signposting to additional support**



**Online knowledge hub**



**Tailored 1:1 support for Group B topics**



**Training and guidance materials**



**Drop-in & lesson sharing sessions**



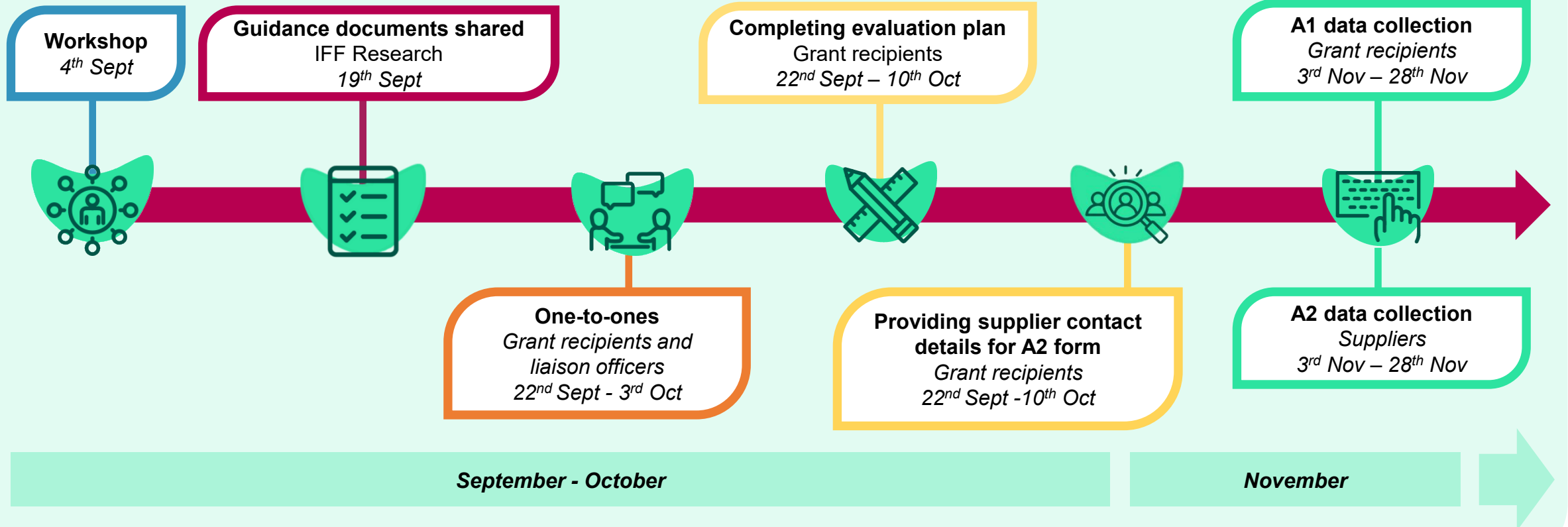
**Evaluation plan support**

# Upcoming activities





# Upcoming activities





# Key takeaways



## Evaluating Wave 3

Working together to maximise its outcomes and improve the evaluation of your retrofit projects



## Support

Available at:  
SHFW3\_EvaluationSupport  
@iffresearch.com



## Next Steps

- Email from liaison officers to organise initial 1-2-1
- IFF will share guidance & evaluation materials



**Any questions?**





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