

July 2025

SHDF Wave 2.1 Case Study



Technical Assistance Facility (TAF) Bridge

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1 Introduction

1.1 Introduction

The Social Housing Decarbonisation Fund (SHDF, now replaced by the Warm Homes: Social Housing Fund, or WH:SHF) aims to support social housing landlords (SHLs) to improve the energy efficiency of their housing stock through the installation of energy efficiency measures.

A key objective of the SHDF is the development of SHLs' capacity and capability to deliver future retrofit. The Technical Assistance Facility (TAF) was a service commissioned by the Department for Energy Security and Net Zero (DESNZ) to support SHLs to apply for SHDF funding, and build their capacity and capability to decarbonise their housing stock.

The first phase of TAF (referred to as TAF 1) was established to support SHLs in England to develop their bid applications for Wave 1 of the SHDF and ended in March 2022. However, the second TAF support package (TAF 2) was not yet ready for delivery for Wave 2.1 due to the increase in application funding for Wave 1 and redefined timelines for Wave 2.1. The TAF Bridge was therefore implemented in a short period of time to bridge this gap in support.

The design of TAF Bridge built on TAF 1, and its aim was to support SHLs in England to apply to SHDF Wave 2, and therefore help develop a robust pipeline of high-quality applications. The TAF Bridge contract was commissioned via a competitive tender under the Government's Heat Networks and Electricity Generation Assets (HELGA) Dynamic Purchasing System. The contract was awarded to Turner & Townsend in March 2022. The TAF Bridge service was promoted as the Social Housing Retrofit Accelerator (SHRA) to potential SHL applicants.

This case study focuses on the development of TAF Bridge and its service model, its engagement with and support of SHLs, and its impact and limitations in relation to Wave 2.1 of the SHDF. Evidence used in this case study comes from interviews with a small sample of SHLs (seven successful and seven unsuccessful Wave 2.1 applicants), interviews and focus groups with representatives from DESNZ, the TAF Bridge delivery team, and the Wave 2.1 Delivery Partner and Delivery Agent. The potential impact of TAF Bridge beyond Wave 2.1, such as supporting SHLs to apply for Wave 2.2, is outside the scope of this case study.

1.2 Overview of the TAF Bridge support

Scheme delivery representatives described a variety of marketing and outreach activities performed by the TAF Bridge team, which included mapping potential SHL applicants and tiering them by how many properties were in their stock. SHLs with more than 2,000 properties were prioritised for Wave 2.1. The TAF Bridge offered various forms of support, ranging from Retrofit Essentials online courses, to bespoke one-to-one support for Wave 2.1 applicants. Figure 1 describes the support journey for Wave 2.1 applicants.¹

When SHLs began their support journey with the TAF Bridge, they were quantitatively assessed in terms of their ability to deliver a high quality application. This assessment resulted in a risk-score for each project and was used to identify the level and type of support required from the TAF Bridge. Projects were assessed against thirteen different criteria. These criteria related to project management, such as the existence and experience of a project team, and to specific aspects of retrofit delivery, for example the existence and suitability of a resident engagement

¹ Information is derived from the TAF Bridge Business Case, Invitation to Tender, and interviews with scheme delivery representatives.

plan. SHLs were rated again before applications were submitted to assess the level of improvement.

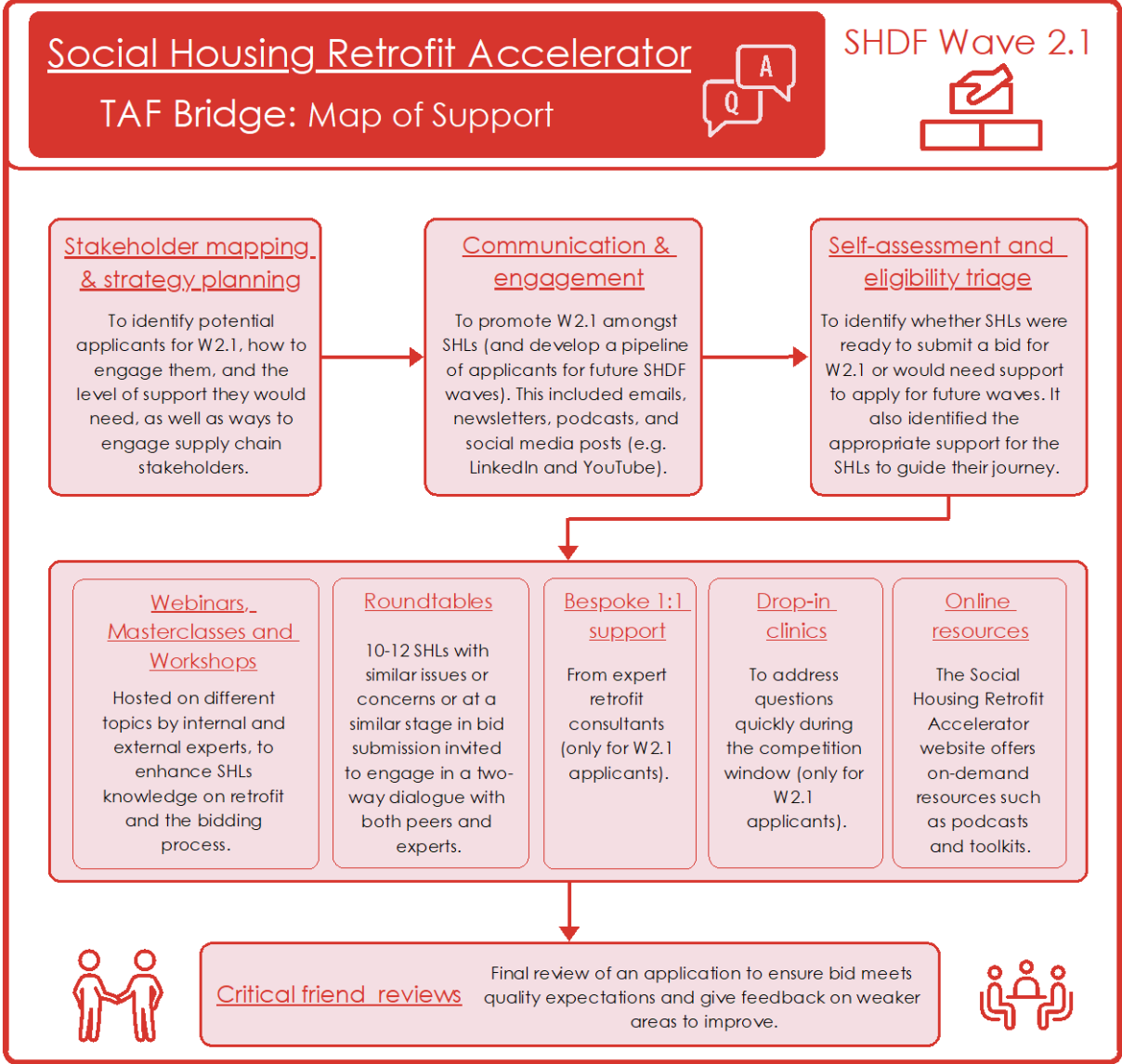


Figure 1 – Map of the TAF Bridge support service

Figure 2 illustrates the support given to SHLs by the TAF Bridge as tracked by the time the Wave 2.1 application window closed.²

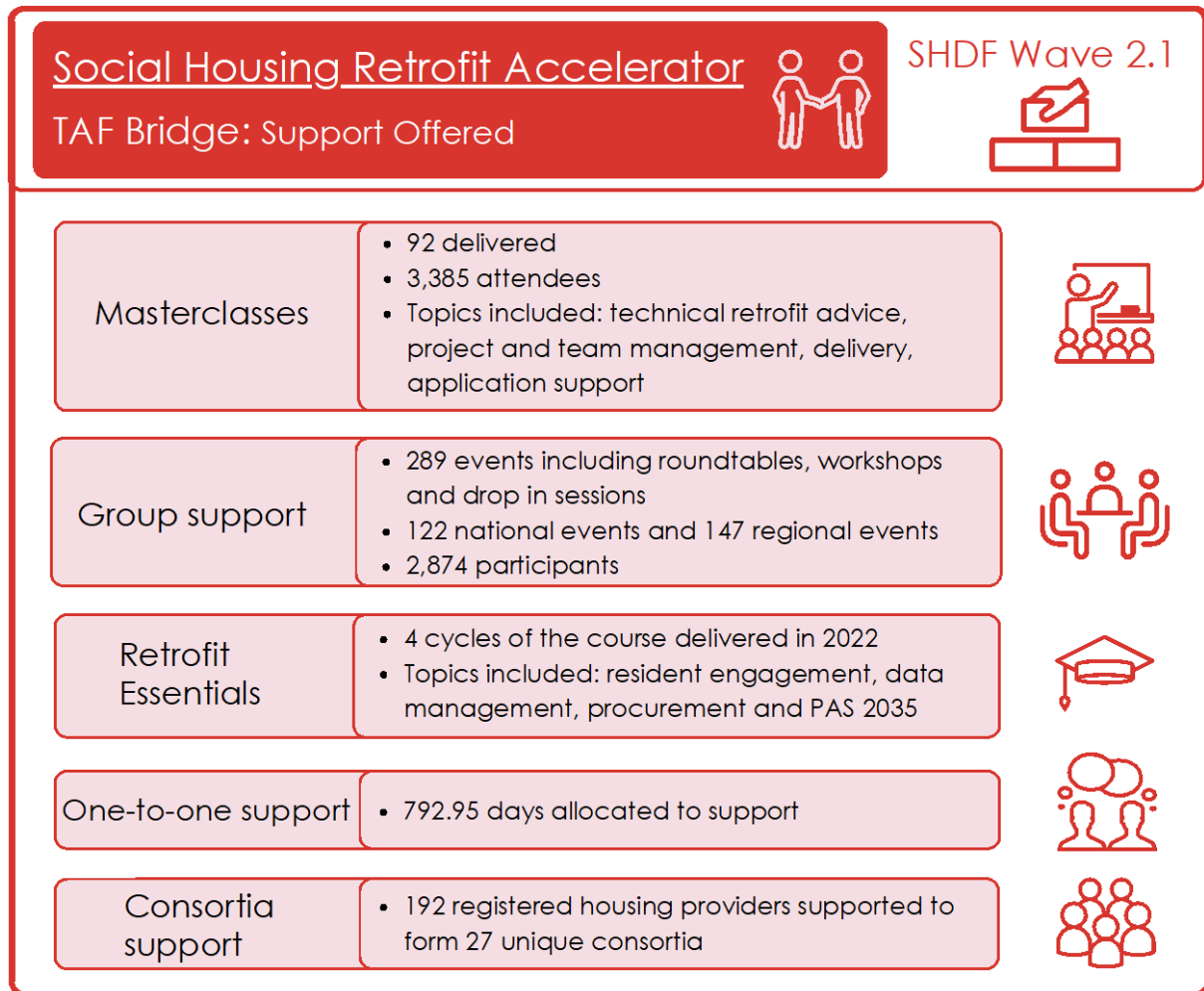


Figure 2: Overview of TAF Bridge support offered to Wave 2.1 applicants.

2 Successes and limitations of the TAF Bridge support

2.1 Enablers of the TAF Bridge support

Scheme delivery representatives believed the TAF Bridge team had put in considerable effort to promote the scheme and engage with SHLs, which resulted in a large number of high-quality bids.

“TAF has a strong role to play in taking and making things public... that also increases the value of the [SHDF] investment.” – Scheme delivery representative

² Quantities of support delivered are from the SHRA Risk Analysis.

Overall, many successful SHLs reported the TAF Bridge support was a key enabler in their application process. Scheme delivery representatives said they thought that the TAF Bridge was especially useful in the pre-application stage, and that not as many projects would have received funding without access to the TAF Bridge support.

Scheme delivery representatives felt that all types of support were useful and well tailored to the needs of SHLs. They also reported that the TAF Bridge helped to raise SHLs' ambitions for their retrofit plans. For example, they reported that one SHL began the application process hoping to treat 500 homes and ended up bidding to treat around 2,500 homes. Scheme delivery representatives felt that direct engagement between senior individuals from the TAF Bridge and senior individuals at SHLs helped engage SHLs and raise the ambitions of their bids.

SHLs found the following support from the TAF Bridge particularly useful:

- **One-to-one support.** Multiple successful SHLs reported that the one-to-one support from the TAF Bridge team was useful. One SHL especially appreciated the frequency of meetings with their designated consultant. The consultants were praised with having very sound knowledge and understanding of Wave 2.1 and its requirements. One successful SHL felt this support was particularly helpful for members of their consortium who had not participated in similar projects before. Multiple scheme delivery representatives also reported receiving positive feedback from SHLs on the one-to-one support, especially the technical support.

"She [the TAF Bridge consultant] knew the programme inside out, all the information in the guidance. She could take some of our queries to weekly calls she had with DESNZ. She was really good at supporting on things where we were unsure if something wasn't working on the application form, and also just to run more strategic things along with her. It was a kind of objective peer review along the way and an information point for all of us." – Successful SHL

- **Critical friend review:** Multiple successful SHLs found the critical friend review useful to receive actionable feedback on their bid aiming to improve its chance of success. One unsuccessful SHL also found this useful as it made them feel more prepared to submit bids for other retrofit schemes (such as the Home Upgrade Grant 2). Scheme delivery representatives also agreed that the critical friend review was useful for applicants and had a significant impact on application success.
- **Communications with DESNZ:** One successful SHL reported that the regular meetings hosted by Turner & Townsend were attended by many SHLs, and the TAF Bridge team were able to relay any relevant questions from SHLs to DESNZ and share answers.
- **Sharing learnings:** One SHL shared instances of the TAF Bridge team improving the support they provided based on learnings from other SHLs. For example, they took learnings from the Greater Manchester Combined Authority (GMCA) on how to complete the financial spreadsheets (which was reported to be a common challenge by applicants).
- **Online resources:** One successful SHL felt that the online resources, including webinars and recorded videos on the SHRA website, helped upskill members of staff in their organisation.

"The whole consortium [was] supported through the SHRA programme... It is definitely a useful service and would recommend anybody access the SHRA." – Successful SHL

SHLs also found the support received from the TAF Bridge particularly useful for topics such as:

- **PAS 2035 support:** One successful SHL reported that the TAF Bridge support was especially helpful for SHLs with little or no experience working within PAS 2035 guidelines.
- **Project management support:** One successful SHL felt that the TAF Bridge was particularly helpful in supporting the coordination of the project, including the project plan. As they were a large project with many consortium members, they felt their contact within the TAF Bridge was able to provide useful oversight to all the individuals involved.
- **Resident engagement:** One successful SHL noted that the TAF Bridge support was especially helpful for planning their resident engagement and receive feedback.

"I found Turner & Townsend really helpful, and I think I watched every single one of their webinars and videos on their website, that was really useful. And I think it has really helped to skill up lots of people within the council. So I think that's been really, really impactful." – Successful SHL

2.2 Limitations of the TAF Bridge support

Despite finding the TAF Bridge support useful overall, both successful and unsuccessful SHLs reported features of the support that could be improved. In general, unsuccessful applicants were less satisfied with the TAF Bridge support as might be expected given the outcome of their application. Feedback from both groups included:

- **Inconsistency in advice:** One successful SHL reported discrepancies between the advice received from the TAF Bridge team and the competition guidance. As a result, they spent more time than expected trying to complete the application, particularly the financial aspects. Another unsuccessful SHL noted a gap between the TAF Bridge advice and DESNZ assessment:

"The feedback we were given by them [TAF Bridge critical friend review] hasn't borne any resemblance to the feedback we've got in terms of an unsuccessful application. If we had been made aware we were light on these three questions, we would have boosted them. [...] There were no inroads directly to BEIS who are obviously living and breathing this stuff." – Unsuccessful SHL

- **Limits to expertise:** Some specific limitations to expertise were raised by individual SHLs. One successful SHL expressed that the TAF Bridge team could not always answer their questions. Another successful SHL specifically felt that the team could have had more expertise on the PAS 2035 requirements (in contrast to another SHL who valued PAS 2035 advice as mentioned earlier).
- **Limits to resourcing:** Some scheme delivery representatives felt that if the TAF delivery team had more time to prepare for the TAF Bridge, a higher number of SHLs could have accessed support. However, due to the need to mobilise the TAF Bridge quickly to support Wave 2.1 applications, this was not possible. One unsuccessful SHL felt that the TAF Bridge was not adequately resourced, compared with TAF 1, as the TAF Bridge had to outsource some support to a different company that did not have the same knowledge and understanding of Wave 2.1.

- **Tailoring of support:** One successful SHL felt that the level of detail included in some of the resources was aimed at SHLs who already had a lot of retrofit expertise. Another successful SHL felt that the storyboarding support on how answer specific application questions was too formulaic and did not suit their way of working. One unsuccessful SHL felt that the TAF Bridge support was less bespoke compared to TAF 1:

"I felt that the support received in Wave 1 was more focused on providing a bespoke service to us and answering our needs. And likewise the feedback after Wave 1 was more tailored to our bid. The Wave 1 support was quite good. The Wave 2.1 support I felt was quite generic." –

2.3 Meeting the objectives of the TAF Bridge

As stated in the Business Case, a key objective of the TAF Bridge was to develop a robust pipeline of high-quality applications for Wave 2.1.

The TAF Bridge was successful in reducing the risk scores of applicants throughout the bid process. At the start of the TAF Bridge service, only one project was in Risk Band 1 (considered low risk) and 28 projects were in Bands 6 and 7 (considered high risk). By the end, 21 projects were in Risk Band 1, and just one project was in Risk Band 6 (with none in 7).

Wave 2.1 was oversubscribed with 145 applications in total, of which 107 were successful. All 145 applicants for Wave 2.1 accessed some support from the TAF Bridge,³ however one unsuccessful applicant reported not getting any support because they did not get any response from the TAF Bridge after contacting them.

During engagement with social housing landlords, as set out in the Business Case, the TAF Bridge aimed to achieve the following:

- **Ensuring funding was allocated to all regions of England**, particularly those that engaged less in retrofit initiatives in the past. Wave 2.1 bid analysis shows that regional distribution of the properties which were planned to be retrofitted under Wave 2.1 roughly reflects the distribution of social housing in England overall.
- **Enabling consortia bids.** A lower proportion of funding was awarded to bids led by consortia in Wave 2.1 compared with Wave 1. Although fewer bids came from consortia compared to Wave 1 (perhaps due to the ability of SHLs to bid without Local or Combined Authorities in Wave 2.1), the success rate of consortia increased compared with Wave 1 (96% compared to 69% in Wave 1). This suggests the TAF Bridge support was useful in helping SHLs form and manage consortia applications. In interviews, two successful SHLs mentioned the support they received was useful to form their consortium, and to ensure all parties were well prepared for their project.
- **Enabling smaller and less experienced SHLs** to participate in SHDF. The Business Case for Wave 2.2 stated that this second part of Wave 2 would offer opportunities for smaller SHLs and those less experienced in retrofit delivery. In contrast, for Wave 2.1, scheme delivery representatives reported that the TAF Bridge engagement focused on SHLs with over 2,000 properties within their stock. This suggests that the objective of including smaller and less experienced SHLs was not met by Wave 2.1. Wave 2.1 bid analysis indicated that the scheme was successful in bringing new SHLs into the scheme, since 259 individual

³ As stated in the SHDF Wave 2.1 Portfolio Review.

organisations were involved in Wave 2.1 as leads or consortia partners compared to 159 in Wave 1. However, few consortia were able to involve smaller housing providers. When looking at the Private Registered Providers (PRPs)⁴ across England, only 3% of PRPs with less than 100 units, and only 11% with 100-999 units, were involved in Wave 2.1. These two groups represent the largest number of PRPs in England, with 467 and 218 SHLs respectively. The TAF Bridge also had an objective to support SHLs who were not ready for Wave 2.1 to apply for Wave 2.2 for funding, so a greater proportion of smaller SHLs may be represented in Wave 2.2.

Key learnings:

- Engagement by senior TAF Bridge leaders with senior leaders within SHLs may be helpful in supporting the development of larger scale bids.
- The limited number of Wave 2.1 applications from smaller SHLs suggests that further engagement and support is needed for this group.
- The use of a RAG rating for assessing the support needed by individual SHLs in their project bids was seen as valuable.
- The one-to-one support and the critical friend review of bids offered by the TAF Bridge were particularly valuable for SHLs.
- TAF support may also be particularly helpful for those who are newer to retrofit and those with limited experience of PAS 2035.
- There are some opportunities to improve future TAF services, for example providing greater clarity on competition guidance and extending the expertise of consultants delivering the service.

Data sources

Data sources used to produce this case study

<i>Interviews and focus groups</i>	<ul style="list-style-type: none"> • 8 interviews with representatives of 7 successful Wave 2.1 SHLs (Q 3, 2023) from a total population of 107 successful SHLs. • 7 interviews with unsuccessful SHLs (Q 3, 2023) from a total population of 56 successful SHLs. • 5 interviews with scheme delivery representatives from DESNZ and the Delivery Agent (Q 3, 2023). • 3 focus groups with scheme delivery representatives from the DESNZ Integrated Delivery Team, the TAF Bridge delivery team, and the Delivery Partner (Q 3, 2023).
<i>Secondary data</i>	<ul style="list-style-type: none"> • TAF Bridge Business case

⁴ Organisations were categorised as PRP (36% of successful bids), Local Authority (56% of successful bids), Combined Authority (7% of successful bids), or Charity (1% of successful bids). The ability of PRPs to submit an application without a Local or Combined Authority was introduced in Wave 2.1.

	<ul style="list-style-type: none">• TAF Bridge Invitation to Tender• Bid support diagnostic data• Maturity assessment and corresponding action plan• SHRA risk analysis condensed• Wave 2.1 lessons learned log
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