Department for Energy Security & Net Zero

Warm Homes Skills Programme

Guidance (second version)

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June 2025

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1. Overview

This guidance sets out the context, application process and assessment criteria for the Warm Homes Skills Programme, an open grant Competition for training providers and further education colleges to secure funding towards the delivery of subsidised retrofit training. This document should be read in advance of submitting any application and should be referred to throughout the Competition process.

The England-wide Competition is run by the Midlands Net Zero Hub (the Hub) with the support of the Department for Energy Security & Net Zero (the Department). The Hub is funded by the Department as part of the Government's Clean Growth Strategy and is hosted by Nottingham City Council.

The open grant Competition will make available up to £8 million in Phase 1 as grant funding for a range of suppliers to deliver accredited training to support the scaling up of the retrofit and energy efficiency sectors. The Competition will be open to applications **on 30 April and close at 4pm on 17 June 2025**. The recipients of training will include both individuals already working in the energy efficiency and building retrofit sectors in England and those looking to enter the sector.

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Subject to successful delivery and confirmation of additional funding, the Department intends to make available up to £9,283,000 in Phase 2 up to July 2027. Applicants can submit indicative bids for Phase 2. The Department reserves the right not to proceed with Phase 2 and confirmation will be provided to successful applicants in due course.

The Competition will fund training included in the following Work Packages:

Work Package 1: Home Retrofit professionals

- Training in retrofit assessor (including combined domestic energy assessor and retrofit assessor training) and retrofit coordinator skills leading to a recognised qualification aligned to PAS 2035.

Work Package 2: Fabric Insulation and Solar Photovoltaic (PV) Installation

- NVQ Level 2 or 3 or equivalent award in fabric insulation or Small-Scale Solar PV installation resulting in a proven competency in line with PAS 2035 or MCS standards; or
- NVQ Level 3 or equivalent award in Energy Efficiency for Older and Traditional Buildings

Work Package 3: Entry-level courses

- NVQ Level 2 or equivalent award in Understanding Domestic Retrofit in line with the PAS 2035 standard
- NVQ Level 3 Introduction to Domestic Retrofit in line with the PAS 2035 standard
- An award in Energy Efficiency and Retrofit of Non-Domestic Buildings in line with the PAS 2038 standard

Work Package 4: Skills for professionals working on Non-Domestic Buildings

- Level 3 or 4 in Non-Domestic Energy Assessor skills leading to a recognised qualification aligned to PAS 2038.

Successful applicants can deliver training in more than one work package but will need to provide separate applications per work package. They will be expected to demonstrate the following within their proposal:

1. Evidence of demand for the proposed skills training courses to support the type and volume of training places to be made available e.g. minutes of meetings held with local supply chain providers or work coaches/job centre, details of enquiries for potential courses, waiting lists, or other auditable evidence. This can include letters of support from organisations who intend to work in partnership with the training provider to provide candidates for training that would then go on to work on specific retrofit projects.

2. Training offered is to be made available at a discounted rate for trainees at the point of delivery; applications should identify the size of the discount compared to market rates for each offered course and any cost to the trainee (or their employer) while ensuring that subsidy control rules are complied with (Section 6).

3. Training can be delivered either online, in physical classroom sessions, or a combination of the two.

4. Competition applicants must be based in England. Face-to-face, classroom-based training delivered as part of the Competition must also take place in England. Training delivered on-line may be delivered from anywhere in the UK.

5. Evidence of compliance with the Competition requirements. This includes the provision of Key Performance Indicator (KPI) for the number of courses to be delivered and an explanation of how these targets will be met within the delivery window.

6. Evidence of provision of onward support to trainees toward building their awareness of retrofit career pathways and future employment potential within the sector.

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A maximum of £1 million will be available in each phase per training provider across all four work packages. The number of projects funded will depend on the range and value for money proposed, as well as the quality of the proposals; as such, the target numbers in section 4.1 for training delivered are intended as a guide only and are subject to amendment, pending responses from applicants to the Competition.

Funding for Phase 2 of the Programme is indicative and will be subject to the outcome of the upcoming Spending Review and the performance of training providers in Phase 1.
To provide a further opportunity for training providers to be supported by the programme, the Department intends to launch a smaller Competition in Phase 2 alongside continuing to support existing Phase 1 providers that have performed well against their KPIs. A mini-Competition may also include supporting new courses in addition to those outlined in Section 4.2. This is subject to the outcome of the Spending Review.
Competition

The Competition is open to providers across England. It is expected that there will be training provision for each of the Competition work packages across the five Net Zero Hub areas (as detailed in Appendix A). Training providers should detail which Hub area or areas they are proposing to cover.

The Department reserves the right to terminate the Competition at any time, and may decide not to award any grants, or to award grants for less than the total funding available. Neither the Department nor the Hub will be liable for any costs incurred in the preparation or submission of applications.

1.1 Timescales

The following table outlines the steps within the Competition, from initial applications to final projects. Rows in grey are indicative for the possibility of Phase 2, subject to budgetary outcomes of the governmental Spending Review.

The Recovery Plan mentioned in Table 1 below will be a process coordinated by the Hub to better ensure that underperforming training providers can bring delivery metrics in line with KPIs as outlined in Table 2 (Section 5: Monitoring delivery). It involves meeting the Hub to discuss reasons for underperformance, the submission of a Performance Improvement Plan for Hub approval and exploring options for a formal Project Change Request (PCR) submission. Missing meetings and deadlines relating to the Recovery Plan will risk training providers being excluded from Programme funding.

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Table 1: Competition timetable

Phase	Milestones	Planned completion date
1st	Competition launch	30 April 2025
1st	Deadline for questions from applicants	16 May 2025
1st	Deadline by which the Department will respond to applicants' questions	5 June 2025
1st	Deadline for submission of proposals	4pm 17 June 2025
1st	Project selection and award notification	25 July 2025
1st	Grant letter signed	1 August 2025
1st	First report deadline	12 September 2025
1st	Performance management is underway and first comprehensive quarterly review of providers is completed	By end November 2025
1st	Second comprehensive quarterly review of providers is completed	By end February 2026
2nd	Competition launch	24 March 2026

2nd	Deadline for questions from applicants	3 April 2026
1st	Access to Phase 2 funding is available dependent on KPI3 performance recorded in monthly reports between end March and June	14 April 2026
2nd	Deadline by which the Department will respond to all applicants' questions	22 April 2026
2nd	Competition deadline for submission of proposals for Phase 2	1 May 2026
1st	Deadline for Recovery Plan April report	15 May 2026
1st	Third comprehensive quarterly review of providers is completed	By end May 2026
2nd	Project selection and award notification	30 June 2026
2nd	Grant letter signed	2 July 2026
2nd	First report deadline	14 August 2026
1st	Training end date – last training day for all courses	31 July 2026
1st	Final report and payment request deadline	14 August 2026
1st	Audit and Phase 1 close out and completion	30 September 2026
2nd	Deadline for January 2027 report deciding further delivery: - February delivery of Recovery Plan, if < 40% started; - Continue Phase 2 delivery, if > 60% completed	12 February 2027
2nd	Deadline for Recovery Plan February report	12 March 2027
2nd	Training end date – last training day for all courses	30 July 2027
2nd	Final report and payment request deadline	13 August 2027
2nd	Audit and close out and completion	10 September 2027

1.2 Amendments to the Guidance

This guidance has been updated after engagement the Hub and Department have carried out on the Programme and the bidding process. The substantive changes are outlined in the information box below and all changes are in highlighted text in the document itself. Please note the application form has also been updated to reflect the changes below.

Information box summarising the points of clarification that have been made to the guidance published on 30 April 2025:

- An extension of the deadline for bids to be submitted from Midday 6 June 2025 to 4pm 17 June 2025.
- Level 3 Award in Introduction to Domestic Retrofit has been included in Work Package 3 as an eligible course.
- Additional information has been inserted in Section 4.1 to clarify that a training provider can bid individually and / or as part of a consortium provided the cumulation of funds for that training provider across all of their bids is within the £1m per training provider per phase limit.
- Additional information has been inserted in Sections 5, 6 and 8 to clarify how the definition of the named term Completed Course applies to the monitoring of delivery and the payment of claims.
- Additional information has been inserted in Section 6.3 to clarify the definition of underrepresented workers and the eligibility requirements for the 10% funding uplift.
- A new payment route has been inserted in Section 8.2 that will enable training providers to claim half of the 70% grant in the case where a learner does not meet the definition of a Completed Course at the end of their training course.
- Additional information has been inserted in Section 8.2 to clarify the Department's expectation that training providers should support learners that fail their course to re-sit their assessment(s), where appropriate. Table 3 has been introduced to the guidance to provide further details on how payments are issued. The table now indicates phases of payment in relation to the Programme's Phase 1 delivery period.
- The table also makes clear that the initial 20% payments in the Mobilisation stage are based on the total KPI2 (Number of Learners Started) forecast for all courses to be delivered. This payment will be made before reporting on actual number of learners.
- As stated in 8.2, where there are less than 80% Completed Courses across all Work Packages by 31 July 2026, Training Providers need to return the amount of 20% mobilisation funding associated with the difference in actual Learners Started against the forecast. The Hub and the Department reserve the right to claw back the funding for the training places that fall below the 80% threshold. The training provider has up to 30 working days after the delivery of Phase 1 to refund the amount.
- A minor change to the definition of the named term Completed Course (defined in Appendix A) to ensure it applies appropriately to courses in Work Package 3 that may not result in a qualification from an awarding body.

2. Introduction

Tackling climate change is a high priority for the Government. In 2019, the UK Government set a legally binding target to achieve net zero greenhouse gas emissions from across the UK economy by 2050. The UK has the oldest housing stock in Europe with around a third built before the Second World War. In 2022, buildings accounted for 31% of total (direct and indirect) UK emissions. The majority of these came from heating: around 75% of buildings emissions, and around 22% of all UK emissions.

The energy shock of recent years has highlighted the urgent importance of improving energy efficiency in UK homes and buildings. The Government's Warm Homes Plan will improve up to 5 million homes across the country by making them cleaner and cheaper to run, from installing new insulation to rolling out solar and heat pumps. The Government will partner with combined authorities and local and devolved governments to roll out this plan.

As the first step towards the Warm Homes Plan, the Government has committed an initial £3.4 billion over the next 3 years towards heat decarbonisation and household energy efficiency, with £1bn of this allocated to next year. Additional funding will be considered in Phase 2 of the Spending Review, as the Warm Homes Plan is further developed.

The Government recognises the importance of facilitating a competent and robust supply chain and is committed to creating the right conditions for SMEs, microbusinesses and trusted traders to grow. Since 2021, through skills programmes, such as the Home Decarbonisation Skills Training Competition and the Heat Training Grant, the Department has invested over £28 million to deliver over 33,000 training opportunities in retrofit, clean heat and energy efficiency roles.

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To build on this activity, the Department is launching the Warm Homes Skills Programme **(the Competition)** which invites organisations to submit proposals for delivering skills training and support to retrofit professionals, installers and installer organisations within the retrofit and energy efficiency sector focused on both domestic and non-domestic buildings. This guidance sets out the context, application process, and assessment criteria, and should be read in advance of submitting any application and referred to throughout the Competition process.

The Competition is open to applications for a minimum period of 4 weeks from 30 April 2025. This guidance and other information related to the Competition is available to download from https://www.gov.uk/government/publications/warm-homes-skills-programme

The Competition will make up to £8 million available for successful providers to deliver training solutions over Phase 1 covering the work packages described in the overview, and for the technologies set out in section 4.1. A maximum of £1 million will be available in each phase per training provider across all four work packages The number of programmes funded will depend on the range of solutions proposed, their value for money and the quality and deliverability of the proposals.

3. Competition Objectives

The overall **objective of the Competition** is to build competence and capacity in the retrofit supply chain by training and upskilling installers and retrofit professionals that can deliver energy efficiency installations through the Government's energy efficiency schemes and in the wider market.

The Competition also aims to:

- Support skills training in the installation of energy efficiency measures to the relevant PAS and MCS standards by increasing the number of competent installers and retrofit professionals.
- Provide trainees with a strong understanding of the routes into the retrofit sector and the opportunities within the Government's energy efficiency schemes, this includes providing tailored support to unemployed people and those currently underrepresented in the construction sector.
- Increase the capacity of training providers in delivering high quality retrofit training by demonstrating the demand for such training and supporting them to set up new delivery of courses.
- Gather information about the specific supply chain and skills provision, to allow the Department to consider targeted support and other interventions in the future.

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4. Competition Eligibility and Requirements

4.1 Eligibility Criteria

The Competition is open to training providers in England who can demonstrate previous relevant experience in delivering training that aligns with one or more of the four work packages described in section 4.2.

Training providers may include further education colleges, training academies, manufacturer training centres, Green Construction Advisory Panels among others. Applications from consortia are welcome but they will – as a consortium – be bound by the £1m limit across the four work packages. Applications will also be considered from providers who do not meet the definitions above, but who can clearly demonstrate they have the capabilities to deliver the Competition requirements to a high standard.

To be eligible for programme funding:

- The project proposal must comply with the Competition requirements (see section 4.2 below).
- The applicant(s) must demonstrate that they are based in England and are able to deliver all classroom training in England.
- The requested funding must not exceed the maximum limit of £1m per phase per training provider (or consortium if two or more organisations are bidding collectively). Where training providers apply for funding across more than one work package, the combined total will be considered against this £1m upper limit.
- The applicant(s) must state and provide evidence (e.g. course certificates) of the professional bodies to which they belong, detailing the accreditations and qualifications held that are essential to the delivery of each relevant training course (where appropriate).
- The applicant(s) must provide evidence (i.e. course prospectus and accreditation from recognised bodies) they have previously delivered or are currently delivering vocational courses in construction, energy efficiency or energy assessment.
- The applicant(s) must be registered with the UKRLP (UK Register of Learning Providers) or registered with a body such as City & Guilds, Logic or equivalent and provide evidence of this.
- The applicant(s) must confirm: their approved centre status, the accreditation body for each course offered and any sub-contractors used in the delivery of the training courses proposed (a letter of support from each sub-contractor must accompany the application).
- The applicant(s) must confirm their organisation (including any directors or partners or any other person who has powers of representation, decision or control) has not been convicted of conspiracy, corruption, bribery, fraud, money laundering or drug trafficking,

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and has not been declared bankrupt[1].

- The applicant(s) must confirm and evidence that the training offered meets competence requirements set out in the relevant PAS and MCS standards and aligns with the National Occupational Standards.
- The applicant(s) must detail the composition of the courses to be delivered and specify clear KPI targets for course delivery, evidence capacity to deliver them and explain how these targets will be delivered monthly and within each quarter of the delivery period.
- The applicant(s) must provide granular cost breakdowns per course, per work package and for the total grant requested.
- The applicant(s) must specify how they will support raising the awareness of trainees of the routes into the retrofit sector, and where training is intended to be delivered to unemployed trainees they must outline the additional support they will provide to support them into work. Links to Job Centre Plus and/or employers will be taken into account when scoring applications, this is particularly important for unemployed trainees. Applicants are required to state whether they are on any public-sector frameworks and, if they are, to list them (this point is not scored).

You may bid as a single training provider and also submit a separate bid as part of a consortium. Please note the total WHSP funding requested for Phase 1 needs to be under £1M. Furthermore, in the case of match funding from public sources, the sum of total WHSP requested funding plus match funding from public sources needs to be under the £1M subsidy cap per programme phase.

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4.2 Competition Requirements

Successful Competition applicants will be expected to meet the following requirements in their chosen work package(s) and region(s):

1. Deliver on realistic self-declared targets for KPI1 to KPI6 as outlined in section 5.1 and Table 2.
2. Deliver the agreed number of installation training courses to the specific technology standard - for example,
    - National Occupational Standards,
    - PAS 2030/2035/2038 Standards
    - MCS standards;

resulting in a proven competency level for the trainee. Where there is no formal qualification for the proposed training course, evidence should be submitted to demonstrate the level of competence the trainee will achieve and how this will enable the individual to work in the sector.

3. Deliver the following;

[1] The Procurement Pathway | Procurement Pathway

i. Training leading to retrofit assessor and/or retrofit coordinator certification; and/or

ii. Skills training in the installation of individual energy efficiency measures supported by government funded retrofit schemes; and/or,

iii. Training in shorter retrofit relevant entry-level courses; and/or,

iv. Training in non-domestic building relevant retrofit skills.

4. Providers must be based in England. Training may be delivered either online from anywhere within the UK or in physical classroom sessions located in England, or a combination of the two as appropriate.

5. As a default, trainees must reside in England and provide evidence of this. We recognise that some individuals may complete the majority of their work in England but reside in a devolved area. To ensure that individuals that live and work across nation borders are not arbitrarily excluded from subsidised training, trainees that live in a devolved area but complete the majority of their work in England will be able to submit an application for funding via their training provider to the Hub. Applications will be considered by the Hub and the Department on a case-by-case basis.

6. Training offered is to be heavily subsidised for the trainee at the point of delivery and all applications must comply with subsidy control rules (see Section 6).

7. Training providers must meet all reporting requirements as set out in section 4.3 to demonstrate compliance with Competition requirements.

8. Training providers must comply with GDPR requirements, including supporting the Hub and Department with the provision of relevant data for compliance checks and to support the monitoring and evaluation of the Competition.

9. Have a learner safeguarding policy in place and implement it throughout the delivery window.

10. Where training is delivered to unemployed and / or those underrepresented in the construction sector, training providers must support trainees to join the industry by matching them with industry opportunities. Links to Job Centre Plus and/or employers will be taken into account when scoring applications, this is particularly important for unemployed trainees.

11. Applicants are required to state whether they are on any public-sector frameworks and, if they are, to list them (this point is not scored).

12. Training providers must enable the completion of third-party quality assurance checks (see Section 6.3). Training providers must also submit links to Ofsted inspections (where they have taken place) and notify the Hub of the outcome of any inspections that take place during the funding term. In cases where Ofsted reports or third-party quality assurance checks are unsatisfactory, training providers will be required to develop and implement a performance improvement plan to implement recommendations. Should recommendations not be implemented within the agreed period, the Hub reserves the right to reduce, pause or terminate the funding.

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4.3 Competition Work Packages

The Competition is split across four work packages as detailed below. Applicants may choose which work package, or packages, they apply to, each work package will be marked independently. There is no minimum funding request limit, however, proposals will need to offer value for money. The maximum limit is £1 million per phase across all work packages. Where applicants apply for more than one work package, the combined total of these bids will be considered in relation to the £1 million limit.

The numbers given below for anticipated qualifications delivered, and anticipated numbers of installers trained, refer to the numbers the Department and the Hub expect to see delivered by this Competition as a whole. They do not refer to the numbers expected to be delivered by an individual Competition proposal. In setting out the volume of training to be delivered by their individual proposal, applicants should clearly justify their target numbers, but they do not need to aim to deliver the headline numbers set out below.

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Work Package 1: Home Retrofit professionals

Work Package 1 courses involve:

- All Level 3 or 4 Domestic Retrofit Assessment recognised qualifications aligned to PAS 2035, including the combination with the Domestic Energy Assessor (DEA) course.
- Level 5 Retrofit Coordination and Risk Management Assessment recognised qualification aligned to PAS 2035.

It is expected that around 2300 training opportunities will be delivered across this work package in Phase 1 to trainees with appropriate existing qualifications or experience, for example the Domestic Energy Assessor (DEA) qualification as a prerequisite for the Domestic Retrofit Assessment qualification.

Work Package 2: Fabric Insulation and Small Scale Solar Photovoltaic (PV) Installation

Work Package 2 courses will include:

- NVQ Level 2 or 3 (or equivalent) awards in fabric insulation resulting in a proven competency in line with PAS 2035/2030 standards. Training in the following insulation measures (i.e. those included in the NVQ in Insulation and Building Treatments) would be suitable.
    i. Cavity Wall Insulation
    ii. Cold Roof Insulation
    iii. Draught-proofing
    iv. External Wall Insulation - Boarder

v. External Wall Insulation – Finisher

vi. Floor Insulation

vii. Insulate Framed Sections of Buildings

viii. Internal Insulation

ix. Warm Roof Insulation

- NVQ Level 3 (or equivalent) awards in Small Scale Solar PV installation resulting in a proven competency in line with MCS standards.
- NVQ Level 3 or equivalent award in Energy Efficiency for Older and Traditional Buildings.

It is expected that around 4,500 training opportunities will be delivered in Phase 1 across this work package to trainees with appropriate existing qualifications or experience.

Work Package 3: Entry-level courses

Work Package 3 courses will include:

- NVQ Level 2 or equivalent award in Understanding Domestic Retrofit in line with the PAS 2035 standard.
- NVQ Level 3 Introduction to Domestic Retrofit in line with the PAS 2035 standard.
- An award in Energy Efficiency and Retrofit of Non-Domestic Buildings in line with the PAS 2038 standard.

It is expected that up to 1,500 training opportunities will be delivered in Phase 1 across this work package to trainees with appropriate existing qualifications or experience.

Work Package 4: Skills for professionals working on Non-Domestic Buildings

Work Package 4 courses must involve training in Level 3 or 4 Non-domestic Energy Assessor leading to a recognised qualification aligned to PAS 2038.

It is expected that up to 700 training opportunities will be delivered across this work package in Phase 1 to trainees with appropriate existing qualifications or experience, for example the Domestic Energy Assessor (DEA) qualification as a prerequisite for the Domestic Retrofit Assessment qualification.

The work packages have been designed around anticipated industry requirements based on the key shortage areas within the supply chain identified across the Government's energy efficiency schemes and the Energy Company Obligation / Great British Insulation Scheme. However, in all cases, applicants should support their specific training proposals and choice of work package(s) with evidence demonstrating that there is demand for their area of focus, and proposed approach.

Evidence of this can include letters of support from organisations partnering with the training provider to provide candidates for training that will work on retrofit projects after completing

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their qualifications. It is expected that successful applicants will provide training to individual learners as well as learners from a range of organisations including SMEs as well as larger organisations.

The Hub will consider proposals that offer training across multiple work packages, but the qualifications earned and skills attained through the proposed training need to be set out clearly in the application to demonstrate that the training meets the requirements of each work package.

The delivery of training opportunities in Phase 1 will run from 1 August 2025 to 31 July 2026. **There will be strictly no extensions to these timelines**. All applicants will be required to demonstrate that their target courses across the four work packages are deliverable within the delivery window. Further information on how delivery will be monitored and managed is provided in section 5.

4.4 Geographic Delivery Areas

Across the Competition as a whole, the aim is to have a reasonably balanced coverage of training across the five Net Zero Hub Areas: South East, South West, Midlands, North East & Yorkshire and North West (these are set out in more detail in Appendix A).

As part of their proposal, applicants are required to set out the split between proposed online and proposed classroom-based training, and specify the Net Zero Hub Area(s) any classroom-based training will operate in.

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4.5 Engagement with the Midlands Net Zero Hub

To ensure the delivery of training provision runs smoothly, successful applicants will be required to work closely with the Hub for the duration of the Competition. It is expected that successful applicants will adhere to the following process while participating in the scheme:

Evidence Submission Procedures

1. **Referrals** – Training Providers are to receive and generate referrals e.g. enquires from businesses, Local Authorities, job centres and other stakeholders. There will be no referrals from the Hub or the Department, but the Competition will be promoted in government communications and through government partners e.g., Supply Chain Sustainability School to raise awareness of subsidised training provision.

2. **Training Needs Assessment** – Training Providers undertake training needs assessment, ensuring each trainee and/or businesses meet the programme eligibility criteria and are suitable for the course.

3. **Enrolment** –Training Providers share the trainee template enrolment forms with the Hub and record and store each participant enrolment form; Providers will maintain a reliable record of trainee enrolment forms as The Hub will request this during the end of delivery

Audit.

4. **Training Records** – Through a monthly report that Training Providers submit to the Hub information including but not limited to the number of participants and businesses enrolling in training courses, the number of trainees failing their final assessment(s), as well as the number of Completed Courses will need to be provided. Based on the monthly reports submitted delivery performance will be RAG rated monthly and cumulatively over the duration of the scheme (as outlined in Section 5).

5. **Outcome Summary** – Training Providers to submit monthly outcome summaries to the Hub, recording all Completed Courses (this provides the Hub with indicative data, detailing projected successful training outcomes).

6. **Financial Claims** – Training Providers need to register as Nottingham City Council Suppliers to receive funding. Through the monthly report, Training Providers submit a monthly claim request to the Hub based on 8.2 Claims column '70% grant' of Table 3. Claims are reviewed by the Hub and either authorised or declined based on evidence submitted and compliance criteria. Claims are paid within 30 working days of the date the claim was 'authorised'.

7. **Comprehensive Quarterly Review meetings** – Training Providers to attend quarterly one-on-one Teams meetings with the Hub to discuss delivery challenges and successes, previous quarter delivery RAG ratings along with relevant finances, as well as to review forecasted KPIs and milestones. Quarterly meetings will also provide the opportunity to discuss the need for a Project Change Request submission (as outlined in Section 5.4).

8. **Participant data** – Training Providers collect and share with the Hub specified personal data and special category data from applicants and trainees to support eligibility, compliance checks, monitoring, third-party quality assessment and third-party evaluation of the Competition. A data sub-processing agreement and a privacy notice will govern this process and will be agreed as part of the Grant Funding Agreement.

9. **Quality Assessment** – Training Providers provide materials as well as physical site and/or digital access needed by the third-party quality assessor. In case where improvements are recommended, a performance improvement plan will be imposed and access to funding may be withdrawn should recommendations not be implemented within a pre-agreed reasonable time period.

Where a Training Provider is found to underperform as per their grant agreement, KPI milestones and training quality, supportive steps will be taken by the Hub in the first instance. However, the grant agreement will include a right to reduce, pause, or terminate the agreement and allocate the funding to an alternative provider if the situation cannot be resolved. This could be allocated to an existing successful applicant who is over-performing or

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to an applicant who was not successful in the first instance, subject to Competition eligibility criteria and subsidy control.

5. Monitoring Delivery

The delivery window for Phase 1 will run from 1 August 2025 to 31 July 2026. **There will be no extensions to the delivery window for Phase 1 offered to training providers.**

To support Phase 1 training providers to meet their KPI targets by the end of the Phase 1 delivery window, the Hub will implement the procedures outlined in Section 5.1. Further details on project monitoring will be covered extensively in the Grant Agreement Letter issued to successful Phase 1 applicants.

5.1 Training Provider KPIs

The following Key Performance Indicators (KPIs) are in place to ensure training providers are following steps necessary to deliver training in line with the delivery figures they have proposed in their applications for respective work packages for Phase 1 of the Competition:

- KPI1 Eligibility, defined as the number of learners that have signed up for courses.
- KPI2 Training places started, defined as the number of learners that have started courses.
- KPI3 Number of Completed Courses as per the definition included in Appendix A.
- KPI4 Learners receiving career guidance, defined as the number of learners that have received information and guidance on retrofit career pathways and employment/commercial opportunities.
- KPI5 Unemployed number of learners, defined as the number of unemployed people or individuals underrepresented in the sector provided with access to potential job opportunities.
- KPI6 Learner Survey, defied as the number of survey responses received from completed learners.

The most important KPI is KPI3, monitoring the number of Completed Courses. KPI3 will be the primary determining factor in terms of whether training providers access Phase 2 funding. All KPI targets will be self-declared, proposed by training providers in their application.

KPI performance will be rated according to tolerances and acceptance criteria presented in Table 2 below as outlined in the RAG Tolerance column. As raised in Table 1 (Section 1), training providers that fall into the RED category may be put onto a Recovery Plan (defined in Section 1) wherein extra steps are taken to bring provider performance in line with KPIs. A learner is considered as having completed the course when the definition of Completed Course in Appendix A has been met.

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A Completed Course is to be evidenced by the qualification accreditation or certificate produced for each trainee a claim is made for. Although evidence is not necessary at the point a claim is made, it is to be provided to the Hub at the end of programme delivery during the final audit.

Claims will be processed within 30 working days of the claim being received by the Hub and agreed to be complete and accurate.

5.2 Monitoring Processes

The Hub will implement several monitoring, quality assurance and escalation pathways to ensure that progress monitoring against KPIs is robust, accurate, accountable and transparent. The Hub will mandate monthly reporting from each successful Training Provider and provide Training Providers quarterly opportunities to update their delivery profile and submit a Project Change Request if required.

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Key monitoring processes will include:

- Monthly report submission monitored for submission timeliness.
- Data checks for accuracy against previous submissions.
- Quality assurance to ensure accurate reflection of progress against targets.
- Compliance against funding conditions.

The monthly reporting submission deadline for Training Providers is 10 working days after the last day of each month. The first report will be due 12 September 2025 (reporting August data including any data from the final days of July 2025).

Reporting will include:

- The top five risks of the month reported
- Any issues
- Key information surrounding any incidents of fraud/loss, or prevented fraud/loss
- Any items the Training Provider wishes to bring to the attention of the Hub, such as lessons learned, good news stories.

Risks will be reported monthly following the scoring table provided in the Risk Register tab of the application. However, risks with a total risk score >14 will need to be communicated to the Hub within 48 hours of materialising.

Factors triggering non-compliance in KPI monitoring (measure of monthly reporting progress):

- Inaccurate Reporting

This refers to reports being submitted which do not meet the required standard. This could be among others because of

- Discrepancies/errors in the number of trainees reported
- Lack of detail on progress, risks, fraud, mitigations and contingencies
- Retrospective changes to figures reported in previous months
- Non-compliance against funding conditions (i.e. claims based on starters instead of completions)

- Late submission

This refers to a situation where a Training Provider submits their monthly report after the deadline without first notifying and receiving consent from the Hub to submit on an alternative date.

RAG Tolerances & Acceptance Criteria

The Hub will monitor the monthly report by applying a RAG rating of actual monthly KPI delivery against forecasted delivery for the same KPI in the same month (submitted in the application). Project delivery will be measured against KPIs included in Table 2, which also includes the different monthly RAG tolerances for each KPI. Access to Phase 2 funding will be determined based on KPI3.

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Table 2: KPIs

KPI number	Type	Description	RAG Tolerance	Evidence required
KPI1	Eligibility	Number of learners **signed up** for courses	GREEN = above 80% AMBER = Between 60% and 79% RED = below 59%	Learner Log as part of the monthly report
KPI2	Training places started	Number of learners **started** the courses	GREEN = above 80% AMBER = Between 40% and 79% RED = below 39%	Learner Log as part of the monthly report
KPI3	Training places completed	Number of Completed Courses	GREEN = above 80% AMBER = Between 60% and 79% RED = below 59%	Learner Log as part of the monthly report and Qualification random sample as part of the audit at project closure
KPI4	Learners receiving career guidance	Number of learners that received information and guidance on retrofit career pathways and employment/commercial opportunities	GREEN = above 90% AMBER = Between 60% and 89% RED = below 59%	Link to website and/or sample pack of leaflets provided to Learners
KPI5	Unemployed number of Learners	Unemployed people or individuals underrepresented in the sector provided with access to potential job opportunities	GREEN = above 45% AMBER = Between 15% and 44% RED = below 14%	Learner Log as part of the monthly report
KPI6	Learner Survey	For Quality Assurance learners will be requested to complete a learner survey of their learning experience.	GREEN = above 45% AMBER = Between 15% and 44% RED = below 14%	Learner survey response from completed learners.

If the monthly report has two consecutive months of Red status in any one of the six KPIs (i.e. KPI1 is rated Red in March and again in April), or 3 consecutive months of Amber status, a progress review meeting as part of the Recovery Plan to reforecast delivery will be required and the Recipient shall deliver the Project in accordance with any reforecast delivery requirements. If delivery within the remaining time is not possible, or if the same KPI/s is/are not rated Green in the monthly report following reforecasting, the Hub may withdraw a proportion of funds (which in the absolute discretion of the Hub and the Department) is appropriate to the level of underperformance.

5.3 Delivery Assurance Checks and Independent Third-Party Quality Assurance

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Delivery Assurance Checks (DAC) will be carried out throughout delivery and will be raised as part of the quarterly review meetings with each Training Provider, as well as on an ad-hoc basis through other meetings as and when requested by either the Hub or the Training Provider. The DAC process will provide the Hub the opportunity to raise any performance, deliverability or compliance concerns, as well as for the Training Provider to raise any concerns they have around their capability or capacity to deliver against the current target (original or re-forecasted) in the forthcoming months up to the deadline of delivery.

Each project will receive an overall Project DAC rating based on the time remaining, budget remaining and trainees to complete against the target in the forthcoming months up to the deadline of delivery. Training providers will be required to follow the Project Change Request procedure to reprofile their KPI targets due to under-delivery. Significant underperformance that does not improve would result in outright termination of the grant.

Where a training provider fails to complete their target number of Completed Courses (including reprofiled targets) at the end of the delivery period, grant funding that can be claimed will be reduced to reflect the delivered courses. Any unspent grant funding will be returned to the Department.

To inform the DAC, training provider delivery will be monitored with respect to quality. An independent third-party quality assurance assessor will assess and score each Training Provider based among others on course materials, facilities, onboarding processes, feedback surveys and staff competence. The quality assurance assessor will:

- Conduct visits to training centres (minimum of one visit per applicant with the potential for a revisit to examine whether any improvement plan is actioned).
- Attend on-line courses (if these form part of the training course delivery).
- Review course materials.
- Review the onward support offered to learners.
- Review the trainee application procedure (Trainee Providers to provide necessary access

to online platforms and physical locations).

- Review trainee feedback surveys (Training Providers are expected to record and provide completed feedback forms for each trainee) with spot checks.
- Review the staff and tutor suitability and competence to deliver the training.
- Produce a quality assessment report per Training Provider with quality RAG rating and recommendations for improvement.

This process will take place once during delivery and training providers are responsible for ensuring the Quality Assessor can complete the activities listed above with information requested provided in a timely manner. In cases where the quality assessment report is unsatisfactory the training providers and the Hub will agree a reasonable time to demonstrate that the recommendations have been implemented. Failure by a training provider to act within this timeframe may result in funding being reduced, paused or terminated.

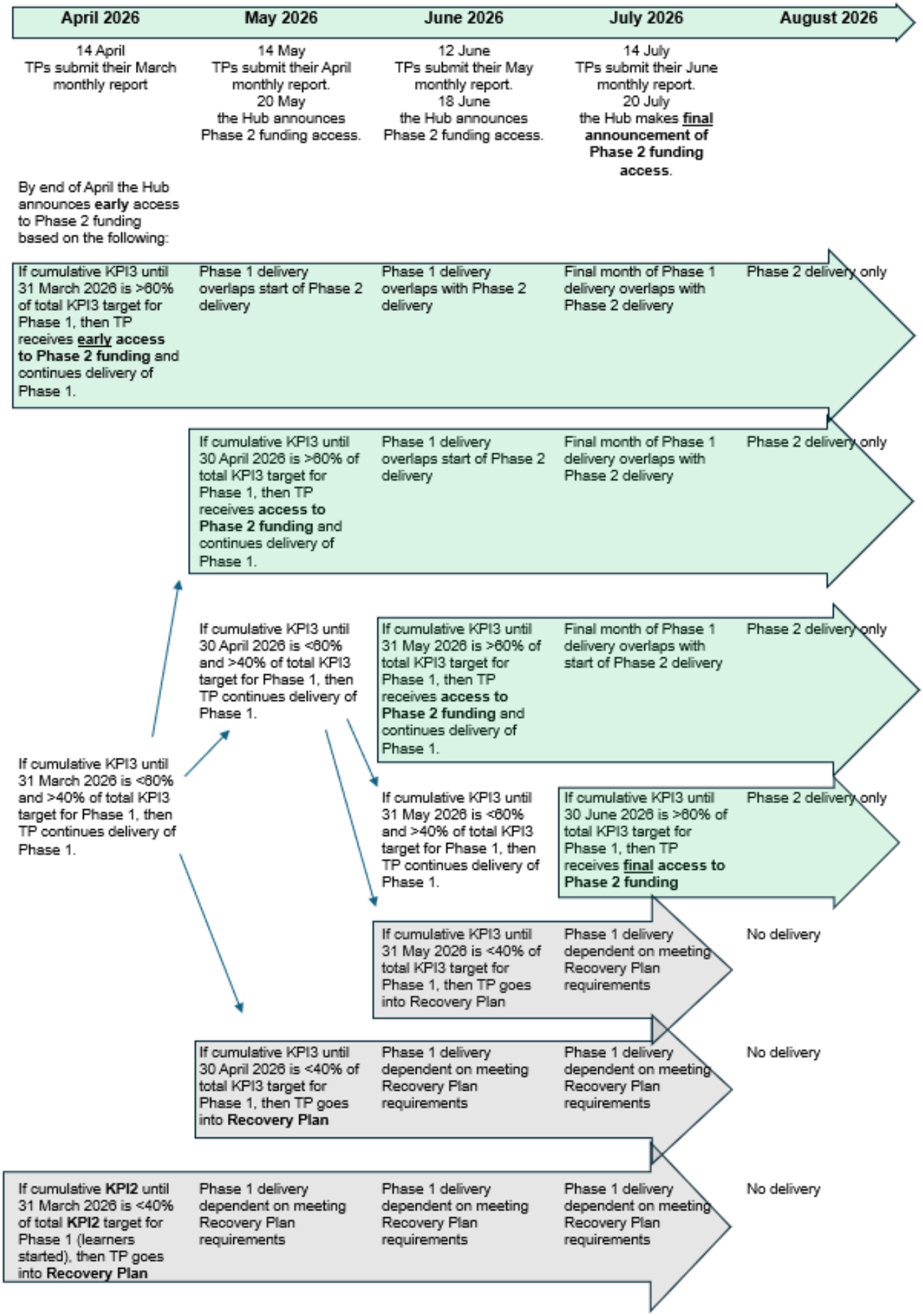
5.4 Access to Phase 2 funding

Phase 2 is intended to run between April 2026 and 31 July 2027. Funding for Phase 2 is indicative at this stage and subject to Spending Review outcomes and the overall performance of training providers in Phase 1. Phase 2 funding will be confirmed by the Department in due course.

Training providers can bid for funding across the two phases and any commitments made by training providers in their application for Phase 2 will be binding. For example, if a training provider did not bid for a course in Phase 1 and wants to add this course to Phase 2, they will be required to bid into the mini-Competition that is expected to take place by the end of June 2026 provided they can continue to meet all competition requirements.

For training providers successful in Phase 1, access to Phase 2 funding will be determined based upon KPI3 training provider performance in Phase 1. This means meeting a specified percentage of their target KPI3 for Completed Courses before the end of the delivery period. The intention is for the Phase 2 delivery window to begin for Phase 1 providers from 14 April 2026 subject to them meeting 60% of their KPI3 Completed Courses target and evidencing this in their March 2026 monthly report. Should a training provider meet this target between 14 April 2026 and 31 July 2026, they will be able to begin to draw down funding for Phase 2 delivery. Should a Phase 1 provider not have completed 60% of their KPI3 Completed Courses target by 31 July 2026, they will be unable to move into Phase 2. The schematic below demonstrates this.

WITHDRAWN


April 2026
May 2026
June 2026
July 2026
August 2026
14 April
TPs submit their March monthly report
14 May
TPs submit their April monthly report.
20 May
the Hub announces Phase 2 funding access.
12 June
TPs submit their May monthly report.
18 June
the Hub announces Phase 2 funding access.
14 July
TPs submit their June monthly report.
20 July
the Hub makes final announcement of Phase 2 funding access.
By end of April the Hub announces early access to Phase 2 funding based on the following:
If cumulative KPI3 until 31 March 2026 is >60% of total KPI3 target for Phase 1, then TP receives early access to Phase 2 funding and continues delivery of Phase 1.
Phase 1 delivery overlaps start of Phase 2 delivery
Phase 1 delivery overlaps with Phase 2 delivery
Final month of Phase 1 delivery overlaps with Phase 2 delivery
Phase 2 delivery only
If cumulative KPI3 until 30 April 2026 is >60% of total KPI3 target for Phase 1, then TP receives access to Phase 2 funding and continues delivery of Phase 1.
Phase 1 delivery overlaps start of Phase 2 delivery
Final month of Phase 1 delivery overlaps with Phase 2 delivery
Phase 2 delivery only
If cumulative KPI3 until 31 March 2026 is <60% and >40% of total KPI3 target for Phase 1, then TP continues delivery of Phase 1.
If cumulative KPI3 until 30 April 2026 is <60% and >40% of total KPI3 target for Phase 1, then TP continues delivery of Phase 1.
If cumulative KPI3 until 31 May 2026 is >60% of total KPI3 target for Phase 1, then TP receives access to Phase 2 funding and continues delivery of Phase 1.
Final month of Phase 1 delivery overlaps with start of Phase 2 delivery
Phase 2 delivery only
If cumulative KPI3 until 31 May 2026 is <60% and >40% of total KPI3 target for Phase 1, then TP continues delivery of Phase 1.
If cumulative KPI3 until 30 June 2026 is >60% of total KPI3 target for Phase 1, then TP receives final access to Phase 2 funding
Phase 2 delivery only
If cumulative KPI3 until 31 May 2026 is <40% of total KPI3 target for Phase 1, then TP goes into Recovery Plan
Phase 1 delivery dependent on meeting Recovery Plan requirements
No delivery
If cumulative KPI3 until 30 April 2026 is <40% of total KPI3 target for Phase 1, then TP goes into Recovery Plan
Phase 1 delivery dependent on meeting Recovery Plan requirements
Phase 1 delivery dependent on meeting Recovery Plan requirements
No delivery
If cumulative KPI2 until 31 March 2026 is <40% of total KPI2 target for Phase 1 (learners started), then TP goes into Recovery Plan
Phase 1 delivery dependent on meeting Recovery Plan requirements
Phase 1 delivery dependent on meeting Recovery Plan requirements
Phase 1 delivery dependent on meeting Recovery Plan requirements
No delivery

5.5 Project Change Request procedure

The process of awarding of the contract to a successful training provider will result in the agreement of grant funding and KPI targets for training opportunities to be delivered across each type of course. The Hub will put in place a formal Project Change Request (PCR) procedure should a training provider intend to propose a change to the grant funding requested, a change to:

- the overall KPI target for Phase 1
- the KPI targets for each work package for Phase 1
- course type for Phase 1

Where a change of the type listed above is proposed, the Hub will require the completion of a PCR form. The form will be submitted to the Hub and reviewed by both the Hub and the Department. A meeting may be arranged to discuss the proposal in greater detail before a decision is made.

The PCR procedure will also be used for any reallocation of funds from under-delivering training providers to training providers that are meeting or surpassing their targets. Should there be an opportunity to receive additional funding, the Hub will formally write to training providers that are meeting or surpassing their targets and invite them to complete a PCR form.

All PCR's submitted will only concern Phase 1. No changes to Phase 2 will be considered before formal confirmation and award of Phase 2. A PCR process for Phase 2 will be released at a later date, subject to confirmation of Phase 2.

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5.6 Compliance with reporting requirements

The evidence submission procedures outlined in section 4.3 are crucial for monitoring the progress made by training providers throughout the delivery window. Support will be provided to all training providers to ensure they understand and can fulfil all reporting requirements; this will include a) Report clinic sessions, b) pre-recorded demo videos, and c) a report completion guide document.

Failing to meet all reporting requirements on a consistent basis (e.g., reports are incomplete or inaccurate for a sustained period of two months) will result in a formal escalation meeting with the Hub and the Department. Continued failure to meet reporting requirements may then result in the termination of the agreement and the reallocation of approved funding to an alternative provider.

6. Funding Levels and Subsidy Control Requirements

The Competition will make available up to £8 million of funding in Phase 1 for projects to deliver energy efficiency installation skills training. A maximum of £1m per phase will be available for each individual training project, subject to subsidy control, and Competition applicants should ensure that their proposals conform to the requirements as described below.

6.1 Eligible Training Project Costs

The eligible costs are those costs relating to a training project that can be funded. These are:

- Trainers' personnel costs, for the hours during which the trainers participate in the training associated with the Competition.
- Trainers' and trainees' operating costs directly relating to the training project, such as travel expenses and accommodation costs directly related to the project, depreciation of tools and equipment to the extent that they are used exclusively for the Competition.
- General indirect costs such as administrative costs and additional rent overheads required for the running of the project; and
- Costs of advisory services specifically linked to the Competition.

The eligible costs will be paid subject to section 8.

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6.2 Subsidy Control

Since 4 January 2023, public authorities must comply with the UK's subsidy control regime. The Subsidy Control Act provides the framework for the regime[2]. The Competition will be subject to the relevant transparency requirements. Providers receiving funding through the scheme will need to ensure that training does not solely or predominately train employees or contractors of a single enterprise whether that enterprise is the same or different to the enterprise carrying out the training. As such providers will be required to record information about employment status and employer name at the sign-up stage and this will need to be shared with the Hub and may subsequently be shared with the Department[3]. Data will be managed in accordance with the relevant Privacy Notice.

6.3 Funding Levels

[2] https://www.legislation.gov.uk/ukpga/2022/23/enacted
[3] https://www.gov.uk/government/publications/uk-subsidy-control-statutory-guidance

The Competition will use the guidelines on subsidy ratios as set out in the Energy Usage Streamlined Route. [4]

The overall percentages of funding that can be provided to an individual project varies based on the training provider overall company size (including parent company)

- 40% total eligible costs for large enterprises.
- 50% total eligible costs for medium enterprises.
- 60% total eligible costs for small enterprises.

Each of these ratios can be further uplifted by 10% if the project explicitly targets the training of workers with disabilities or underrepresented workers, to encourage a more diverse retrofit sector.

"Underrepresented workers" means a person belonging to a group that is underrepresented in the construction labour market in relation to the specific training that is being provided, as evidenced by ONS data[5]. The groups that have been identified for the purposes of this programme are: women; people aged 16-25; those from minoritised ethnic backgrounds; people with disabilities. "Workers with disabilities" means a person who has a disability as defined in the Equality Act 2010.[6] This is a person with physical or mental impairment that has a substantial and long-term negative effect on their ability to do normal daily activities. Please note that in relation to age, the ONS categorisation of underrepresented persons is 16-25 but in the case of funding provided via the Warm Homes Skills Programmes, subsidies for training will be for those who are 18 and over for reasons of safeguarding

The maximum funding is equal to the funding rate multiplied by the Eligible Costs. Please note these are maximum funding levels and the Department may decide to provide less than the maximum in order to strengthen leverage and value for money, depending on the specific project requirements.

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6.4 Public Funding

In applying to this Competition, training providers must state if they are applying for, or expect to receive, any funding for their project from public authorities or its agencies. Any other public funding will be cumulated with the Competition funding to ensure that the public funding limit levels are not exceeded for the project.

Whilst the Hub will check the information provided, applicants should establish that they fall within the Competition rules before submitting applications. The Department requires applicants to notify them of any change to their situation or circumstances during the project.

As part of the assessment process, the added value and additionality of public funding will be

[4] (Energy Usage Streamlined Route Guidance)
[5] Diversity in the labour market: Industry - Office for National Statistics

[6] https://www.legislation.gov.uk/ukpga/2010/15/contents

tested. Applicants will need to demonstrate why public funding is required to deliver this project.

7. Application Process

The application process for the Competition will be run though the Hub with support from the Department.

7.1 How to respond

Training providers will need to complete and submit the separate application form which is available on gov.uk. Applications must be received no later than **4pm 17 June 2025.** Responses should be in PDF format and clearly show how the application meets the requirements of the work package chosen. Responses can be emailed (preferred option) or posted using the details below. The subject line of the email should include 'WHSP application submission'.

Respond by Email to: whsp@nottinghamcity.gov.uk

When responding, training providers should state the work package(s) and geographical area(s) that their proposal relates to.

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7.2 Assessment Criteria and Scoring Methodology

Applications will be logged, and an acknowledgement email will be issued to training providers, providing a unique reference number for their application within two days of the closing date. All applications will be checked for eligibility. Only those that are considered to be eligible will be fully assessed.

Given the broad nature of the Competition, a range of creative and varied responses are expected. To ensure a fair and transparent process, applications will be reviewed by an assessment panel comprising officials from the Department and the Hub. The assessors will review each application submission; applications will be scored against the criteria below and weighted accordingly.

Assessment criteria and weightings (sections refer to the separate Application Form)

Section A: (Lead) Applicant Details [Not scored]

Section B: Partner/Sub-contractor Details [Not scored]

Section C: Project Details [15%]

Section D: Deliverability and Supporting Evidence [10%]

Section E: Project Management and Governance [10%]

Section F: Record Keeping, Course Attendees, Delivery Consistency and Financial Management & Control [10%]

Section G: Project Team [10%]

Section H: Sustainability and Social Value [5%]

Section I: Technical Work Package Related Questions [10%]

Section J: Breakdown of Costs and Funding [30%]

Section K: Subsidy Control and Public Sector Frameworks [Pass/Fail]

Section L: Summary of Supporting Documentation [Pass/Fail]

Section M: Declaration and Signature [Pass/Fail]

Upon individual completion of the assessments, the assessment panel will meet to review and agree the final recommendations. When considering the awarding of grants, a project may be rejected if its score is unacceptably low in one or more criteria area, even if it achieves a high score overall.

Final recommendations will also take into account the overall combination of work packages and geographical spread across the recommended projects. Lower scoring projects will not be supported over higher scoring ones simply to achieve a better spread of work packages and areas, however the Hub and the Department reserve the right to ask successful applicants to review and reconsider their proposed delivery areas, if necessary, with a view to achieving better geographic coverage and availability of training.

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Any decision to award made by the assessment panel is final and there will not be an opportunity for unsuccessful entrants to appeal.

The Department and the Hub also reserve the right to terminate the Competition at any time, and may decide not to award any grants, or to award grants for less than the total funding available. Neither the Department nor the Hub will be liable for any costs incurred in the preparation or submission of applications.

7.3 Intellectual Property

Organisations interested in taking part in the Competition should be aware that neither the Department nor the Hub will reserve any R&D results exclusively for its own use. All intellectual property generated during the project will remain with the competition winners.

Participants are responsible for identifying and protecting any patentable outputs within five years of their creation. However, costs related to securing or maintaining IP rights—including patents—are not eligible for funding and must be covered independently by the participant. These costs cannot be included in the grant award.

The Department requires a UK wide, irrevocable, royalty-free, non-exclusive licence, together with the right to grant sub-licences, to use or publish information, data, results, outcomes or conclusions which are created in performing the project, for non-commercial purposes.

7.4 Notification

Applicants will be informed by email whether their application has been successful, subject to compliance with the terms and conditions of the Grant Letter.

7.5 Publication of results

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The Department and the Hub will publicise the results of the Competition, which may involve engagement with the media. At the end of the application and assessment process, the Department may issue a press release or publish a notice on its website. Any public notices are likely to include:

- Identity of the participant and any partners.
- Project summary information including aims and expected outcomes of the training delivered.
- Ways for prospective trainees to enrol with particular training offers.
- Total award value.

Any organisation that intends to publicise its project, at any stage, must contact the Hub before doing so and submit the planned material to be published for review and approval.

Following completion of the funded projects, the Department will publish on its website a summary of the funded activities and the outcomes achieved. This will include a final summary report from each project detailing the training approaches adopted (and technologies and skills areas covered by each project), key achievements and any learnings and recommendations for future skills training initiatives. The Department may also revisit projects at a later date.

The Department, however, recognises the need to maintain confidentiality of commercially sensitive information. The Department will consult applicants regarding the nature of information to be published, to protect any commercially sensitive information and will ensure compliance with the UK GDPR.

7.6 Feedback, re-application and right of appeal

A short summary of key feedback regarding the applications will be provided to all applicants, this feedback will be based on the comments of the assessment panel. No additional feedback

will be provided and there will be no further discussion on the application. The Department's and the Hub's decision on project funding is final and there will not be an opportunity for unsuccessful entrants to appeal.

8. Successful Applications

Where an application has been successful, the Hub will contact training providers with an offer in principle and to confirm the organisation's bank details (the Hub will ask for the latter on letter headed paper with the application). Training providers will then have 5 working days to sign, accept and return to the Hub the terms and conditions of the grant. These can be found in the Grant Agreement Letter template found in Appendix B. The final Grant Agreement Letter to be signed may include terms in addition to those set out in the template and this guidance. Along returning the signed Grant Agreement Letter, training providers will also need to confirm that all the information within their application is correct.

Important: Training providers must not start their project until the Hub have received, checked and approved the signed offer letter and any other additional documents they may request.

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8.1 Verifying bank details

We require Grant Recipients to have their own UK-based bank account. To minimise the risk of improper use of grant funds, we require two authorised signatories on the account for all cheques and withdrawals including internet purchases. Account signatories must not be related or live at the same address.

So that the Hub can verify training provider account details, they will be required to provide an original bank statement which must have all pages included and must not be more than three months old.

If the provider is a new organisation that has only recently opened their account, the Hub will require the provider to obtain a letter from their bank confirming when the account was opened, account details and the names/addresses of the account signatories.

Important: the Hub will require original documents. On completion of checks the original documents will be returned to the provider via secured post. If the training provider is unable to provide originals, the hub will require copies that must be stamped and certified as true copies by the provider's Bank or Building Society.

Once the Hub have received the training provider's signed form back and completed final checks, the Hub will notify the provider of when they may proceed with the project.

8.2 Claims

Finance is released against stages of work, rather than a lump sum on approval. Initial funds of up to 20% can be claimed in advance of expenditure for the mobilisation stage of work. Where

there are less than 80% Completed Courses across all Work Packages by 31 July 2026, the Hub and the Department reserve the right to claw back the amount of 20% mobilisation funding associated with the difference in actual Learners Started against the forecast. The training provider has up to 30 working days after the delivery of Phase 1 to refund the amount.

In relation to 'Delivery stage' (as per Table 3), a proportion of the 70% of the allocated grant will be released monthly upon satisfactory completion of a Warm Homes Skills Programme claim form as part of the monthly report. In the case a learner does not meet the definition of Completed Course at the end of their training course (i.e. if the learner completes all the training and assessment but fails the course), the training provider will be able to claim 35% (first half of the 70% of the allocated grant) as part of the monthly report. We expect training providers to support learners that fail to re-sit their assessment, where appropriate. Where a training provider does this and the learner subsequently passes their final assessment then the remaining 35% (further half of the 70% of the allocated grant) can be claimed.

The remaining 10% of the grant will not be released until the end of project delivery and successful completion of a final audit of qualifications and/or certificates.

Please refer to Table 3 below.

For the purpose of the audit the Hub will request among others:

I. Evidence or copies of work undertaken

II. Receipted invoices of costs for a random full month (selected by the Hub)

III. Qualification accreditation certificates for a random number of trainees the Hub will select amounting to 10% of the Completed Courses by the end of project delivery.

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Grant recipients delivering courses with duration longer than **12 weeks** are eligible to apply to claim their grant through a split payment plan which allows them to claim part payment for candidates who have reached an agreed milestone on their course but still to achieve the relevant qualification. Please refer to Table 3 below.

- The agreed milestones involve the following:
  - i. evidencing finishing of 50% of the course for claiming the first half of the 70% allocated grant (equal to 35% of allocated grant) per learner claimed monthly,
  - ii. evidencing Completed Courses, even if the qualification/certificate is pending, for claiming the second half of the 70% allocated grant (equal to the remaining 35% of allocated grant) per learner claimed monthly.

Table 3: Payment routes

Course type	Mobilisation stage: 20% mobilisation	Delivery stage: 70% grant		Post delivery stage: 10% final grant
1. Short course (<12 weeks) – for Completed Courses	Based on the total KPI2 (Number of Learners Started) forecast for all courses to be delivered.	70% when learners are reported to have met the definition of a Completed Course.		Dependent on qualification/certificate audit
2. Short courses where the learner finishes all training and interim assessments but does not pass their final assessment **(Does not apply if payment route 3 is applied)**		35% when learners are reported to have finished all training and interim assessments but have not passed their final assessment	Remaining 35% when learners are reported to have met the definition of a Completed Course.	
3. Long courses (>12 weeks)		35% when learners are reported to have finished the first half of their course	Remaining 35% when learners are reported to have met the definition of a Completed Course	

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- Grant recipients who wish to apply for this payment plan must submit a formal request to the Hub, before the deadline for submitting the signed Grant Agreement Letter on 1 August 2025, highlighting the following:
  - i. justification for requiring this payment plan.
  - ii. the measures they have in place to a. evidence the ability to track learner course progression, and b. prevent candidates from failing to achieve a Completed Course after part payment has already been made.
- The final decision on applications to claim grant through the split payment plan would be made by the Department based on the strength of the formal request from each recipient.
- Evidence of finished the first half of the training course (courses longer than 12 weeks): as will be defined in the Grant Award Letter.

Evidence of failed assessments (courses shorter than 12 weeks only): as will be defined in the Grant Award Letter.

Further information on the approach to monitoring delivery is outlined in Section 5 and more details regarding payment terms for each training provider's individual circumstances will be set out in the Grant Agreement Letter for successful applicants.

8.3 Claim Form

At each stage of work (as referenced in 8.2 Claims Table 3), projects will be expected to complete and submit to the Hub for processing a Warm Homes Skills Programme claim form as part of the monthly report. Please note claims are to be made strictly in alignment with 8.2 Claims Table 3. The definition of Completed Course is described in Appendix A and should be used as the basis of evidence for submission of claim forms.

8.4 Payment of Grant

Training providers will need to sign up as a supplier with Nottingham City Council. The grant will be transferred to training providers' account via BACs once the Hub receive their signed form and have completed internal checks.

A signed Grant Agreement Letter by 1 August 2025 and prior to any funding transfer.

Please note: a maximum of £1 million per successful applicant per phase will be awarded (subject to subsidy control).

8.5 Evaluation Requirements

To assess the impact of the Competition, including value for money, and to ensure that lessons and best practice can be captured and fed into future skills policy thinking, the Department may wish to conduct evaluation work on all aspects of the delivery of successful projects. Successful applicants will engage and participate in this evaluation work which may include the Hub, the Department, and/or a third-party evaluation partner. Applicants will be required to collect and share specified personal and special category data from trainees for the purposes of evaluating the programme.

All data will be used in accordance with UK General Data Protection Regulation.

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8.6 Project Completion

On completion of their project, training providers must submit the following pieces of evidence to the Hub for review prior to receiving final payment.

Final Report: This report must include:

- Full details of the project costs and outputs.
- Lessons learnt during the design and delivery of the training.
- Recommendations on possible design features for future government skills training initiatives in the energy efficiency space.

Grant Spend evidence: Evidence of all expenditure such as invoices, receipts and proof of payment are also required. Should training providers have any grant funds remaining on completion of their project these must be returned to the Hub.

Qualification evidence: Electronic copies of the qualification certificates achieved from 10% of the total number of trainees who achieved their qualification within training providers' delivery period on the scheme.

The final 10% of the funding will not be paid until the final audit has been completed. This will comprise the Training Provider sharing with the Hub within a month from project delivery completion all required KPI outputs and finance information supported by evidence to a standard deemed satisfactory by the Hub.

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Appendix A

Definitions

In this guidance the following terms shall have the following meanings:

Application	the application submitted by Training Providers to the Department and the Hub in respect of the Warm Homes Skills Programme.
Bribery Act	the Bribery Act 2010 and any subordinate legislation made under that Act from time to time together with any guidance or codes of practice issued by the relevant government department concerning the legislation.
Completed Course	A course is considered completed by a learner when they have attended all aspects of training included in the course (i.e. taught sessions, on-line self-taught modules, workshops, bootcamps etc), they have succeeded in passing all relevant forms of final course assessment (i.e. exam, interview, portfolio, practical application, project presentation etc), and they have achieved the qualification and/or a certificate from the governing body or training provider exists or is pending.
Course	means a training course for green skills training in relation to the installation of energy efficiency and low carbon heating measures and training for retrofit coordinators and other retrofit professionals delivered by Training Providers.
Data Protection Legislation	all applicable data protection and privacy legislation in force from time to time in the UK including the UK GDPR; the Data Protection Act 2018 (and regulations made thereunder) and the Privacy and Electronic Communications Regulations 2003 (SI 2003/2426) as amended and the guidance and codes of practice issued by the Information Commissioner or other relevant regulatory authority and applicable to a party, together with any applicable national implementing laws, regulations and secondary legislation in England and Wales relating to the processing of Personal Data and the privacy of electronic communications, as amended, replaced or updated from time to time and any laws that replace, extend, re-enact, consolidate or amend any of the foregoing.
Grant	the sum to be paid to successful Training Providers upon review and scoring of the Application and signing of the Grant Funding Agreement. The Grant available for any Subsequent Phase will be set out in the Project Change Request for the Subsequent Phase.
KPIs	Key Performance Indicators against which the Recipient's performance of the Project shall be measured, as set out in Table 2.
Law	any law, statute, subordinate legislation within the meaning of Section 21(1) of the Interpretation Act 1978, the laws of England and Wales and any other laws or regulations,

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	regulatory policies, guidelines or industry codes which apply to the Project or with which the Recipient is bound to comply.
Learner	means an individual enrolled on a Course.
Milestone	means an event or task which, if applicable, shall be completed by the relevant Milestone Date. For Phase One the Milestones shall be set out within the Application and may be amended or replaced in a Project Change Request.
Milestone Date	means a date to which a Milestone relates. For Phase One the Milestone Dates shall be set out within the Application and may be amended or replaced in a Project Change Request.
Monthly Report	the monthly report to be produced by the Recipient in accordance with Section 5 (Monitoring Delivery)
Personal Data	shall have the same meaning as set out in the Data Protection Legislation.
Phase	means any period of Course in accordance with the terms of the Scheme, being either Phase One or Phase Two.
Phase One	means the first Phase of delivery under the Scheme, being the period from the Commencement Date to [30 June 2026].
Phase Two	Means the second Phase of delivery under the Scheme the duration of which shall be confirmed by the Hub in writing if the Department exercises its right to extend the project into Phase 2
Project	means the project described at Section 1 (Overview).
Project Change Request	means a change request which, once approved in accordance with the Change Request Process and signed on behalf of the Hub (and the Department as appropriate) shall be binding between the parties.].
Project Delivery Plan	means the Training Providers plan for delivery to be confirmed upon successful award of Funding. Relating to the Project in any Phase, as may be updated or replaced from time to time.
Recovery Plan	a process designed to support training providers whose performance falls below expected standards, aiming to bring delivery metrics back in line with KPIs. It is coordinated by the Hub and necessitates Recipient participation to avoid risk of exclusion from Programme funding.
Scheme	means the Warm Homes Skills Competition delivered pursuant to the Warm Homes Skills Programme 2025-27.
Scheme Guidance	means the guidance document for the Scheme prepared by the Department and may be amended or updated from time to time.
State Subsidy	has the meaning set out in the definition of 'subsidy' in the Subsidy Control Rules applicable at the time any such State

WITHDRAWN

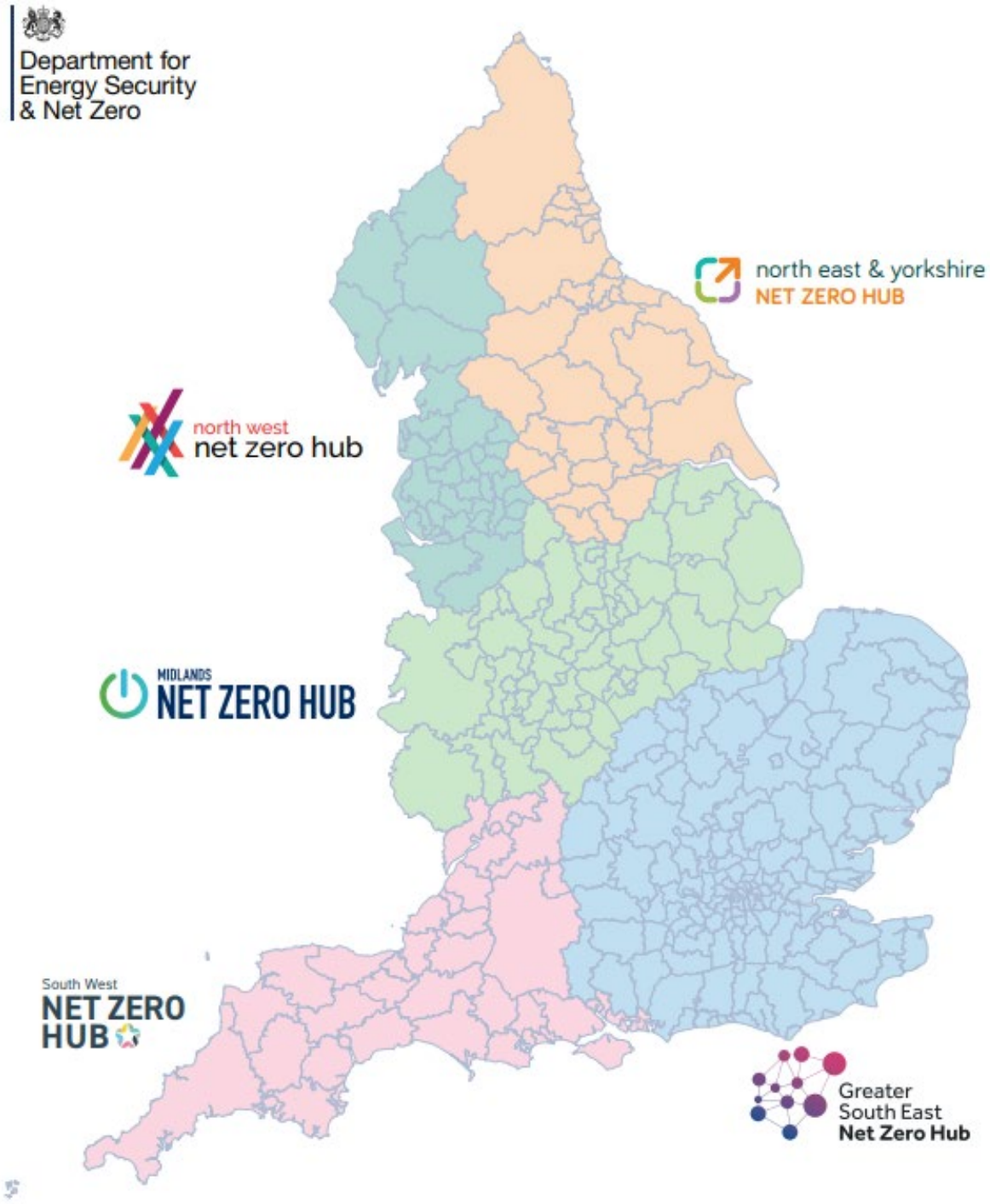
	Subsidy is made.
Started	in relation to a Course means that a Learner has enrolled and has commenced the first teaching component of the Course;
Streamlined Route	means the Energy Usage Streamlined Subsidy Scheme, made by the secretary of state under s.10 (4) of the Subsidy Control Act 2022.
Subsequent Phase	means any Phase of project delivery subsequent to Phase One.
Subsidy Control Rules	means all Laws of the United Kingdom limiting State Subsidy, including the Subsidy Control Act 2022, any relevant secondary legislation and government guidance, any relevant case law or decisions of the courts and tribunals of England and Wales interpreting or regarding the application of such laws and to the extent relevant, the Protocol on Ireland/Northern Ireland in the EU withdrawal agreement together with such rules, agreements, protocols and Laws as may replace them from time to time.
Term	the term of this agreement, starting on the Commencement Date and ending on [30 June 2026] unless terminated earlier.
UK GDPR	has the meaning given to it in Section 3(10) (as supplemented by Section 205(4)) of the DPA 2018**.**
Working Day	means any day other than a Saturday, Sunday or public holiday in England.
Work Package	means each of the four work packages more particularly described in Section 1 (Overview)

WITHDRAWN

Appendix B

Hub Geography

In order to have maximum impact it is envisaged that the applicants to the Competition will individually and / or between them cover the five Hub regions across England. Within the application training providers will need to state the Hub location area or areas their training will cover.



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