

Retrofit glossary for the supply chain

Supply chain advice pack

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Retrofit glossary for the supply chain

Terms are listed in alphabetical order and the theme areas in this pack are retrofit funding schemes, housing providers, data, retrofit standards, procurement, resident engagement and project management.

Retrofit
funding
schemes

Housing
providers

Data

Retrofit
standards

Procurement

Resident
engagement

Project
management

Retrofit funding schemes

Term	Description
Admin & Ancillary (A&A) costs	A term typically used in government funded schemes to refer to costs associated with administrative costs and ancillary works. It is separate to capital costs.
Capital costs	Capital costs refer to total construction costs for labour, materials, services and project management.
Consortium	A group coming together to deliver a joint project. There is usually a lead. The collective term when referring to consortiums is 'consortia'.
Enabling works	Refers to the preliminary construction activities required to prepare a site for the main construction works.
Grant Funding Agreement (GFA)	A document between the Department of Energy Security and Net Zero (DESNZ) and the main grant recipient.
Memorandum of Understanding (MOU)	An MOU is an agreement between multiple parties, it is not legally binding but shows a formal commitment. They can be quite common in the retrofit sector.
Infill properties	Refers to adjacent buildings which are not the target of scheme intent (such as alternative tenure) but where the exclusion from upgrades will be at the detriment of overall project. E.g. preventing a block or row of connected properties from receiving EWI because of an ineligible property in the middle. Some schemes, such as Warm Homes: Social Housing Fund, have an infill allowance threshold for example for properties of a different tenure or EPC category. Refer to the scheme guidance for more.

Off-gas grid	In the SHDF and WSHF guidance, off gas refers to homes that do not use gas for heating purposes. The Warm Homes: Social Housing Fund Wave 3 guidance states there is a “An additional cost cap uplift of £7,500 grant funding is available for Grant Recipients installing low carbon heating measures in homes off the gas grid” (DESNZ, 2025). See scheme guidance for more.
Warm Homes: Local Grant	A government-funded scheme which provides grants for energy performance upgrades and low carbon heating to low-income households living in the least energy efficient, privately owned homes in England to achieve improved comfort and health, energy bill savings and carbon savings.
Warm Homes: Social Housing Fund	A government scheme which provides funding to local authorities, combined authorities, registered providers of social housing, and registered charities that own social housing in England to install energy efficiency upgrades and low-carbon heating measures to their qualifying homes.

Housing Provider

Term	Description
Housing association	These are not-for-profit social landlords that aim to provide affordable housing.
Arms Length Management Organisation (ALMO)	Is where an organisation manages housing stock on behalf of a council.
Decent Homes Standard	A government standard for social housing. It has been in place since the early 2000s and is under fresh review since 2021.
Disabled Facility Grant (DFG)	Grants provided by local authorities to help meet the cost of adapting a property for the needs of a disabled person.
General fund	Used to record all resource inflows and outflows that are not associated with special-purpose funds.
Housing Health and Safety Rating System (HHSRS)	A mechanism for identifying and categorising risks and hazards in properties. It was introduced under the Housing Act 2004 and applies to residential properties in England and Wales.
Home Energy Conservation Act (HECA)	Under the Home Energy Conservation Act 1995 (HECA) English local authorities are required to submit a report every two years setting out the energy conservation measures that the authority considers practicable, cost-effective and likely to result in significant improvement in the energy efficiency of residential accommodation in its area.
Housing officer	They provide a service that includes tenancy and leasehold management, undertaking block and estate inspections and

	responding and dealing with housing and tenancy related enquiries raised by tenants and leaseholders.
Housing Revenue Account (HRA)	Intended to record expenditure and income on running a council's own housing stock and closely related services or facilities, which are provided primarily for the benefit of the council's own tenants.
Resident liaison officer (RLO)	A single point of contact that manages communication between residents and the organisation.

Data

Term	Description
Energy Performance Rating (EPR)	Purpose is to show the energy efficiency and associated carbon emissions for a given property. EPRs and Energy Performance Certificates (EPCs) are exactly the same with the exception that EPCs must be registered on the governments Landmark database. An EPR is for reference purposes, i.e. not a certificate, and will not satisfy the requirements of current regulations.
Energy Performance Certificate (EPC)	An EPC is a national energy performance indicator for buildings. It shows a property's energy efficiency rating from G (lowest efficiency) to A (highest efficiency).
Heating demand	Heat demand is a measure of how much energy is required to heat an internal space. The metric used is kilowatt hours per square metre per year (kWh/m ² /yr). A common target for 'deep' retrofit is ~50 kWh/m ² /yr.
Standard Assessment Procedure (SAP)	SAP is a national performance measurement standard. SAP is based on mathematical model that estimates annual energy consumption based on characteristics, heating systems, lighting, and renewable technology. SAP scores range from 1 (lowest efficiency) to 100 (highest efficiency).
Reduced Data Standard Assessment Procedure (RdSAP)	RdSAP data is the 'reduced' version of SAP and is used in EPC assessments of existing homes. RdSAP uses some default data for certain data points where information is not as easy to collect (e.g. U-values for building fabric elements). The assumptions embedded in RdSAP means is not as accurate as full SAP.
Retrofit assessment	These are detailed surveys of the home carried out prior to any retrofit measures being installed. The retrofit Designer and Retrofit Coordinator use the Assessment to evaluate the most suitable measures and produce a detailed retrofit plan.
Stock condition survey	A visual inspection of a home's condition, both inside and outside. It is used to assess the age and condition of a home's

	main components, such as the roof, windows, doors, kitchen, and bathroom.
Thermal imaging surveys	Also known as Infra-red imaging, which is used to show areas of heat loss in a building.

Retrofit standards

Term	Description
Microgeneration Certification Scheme (MCS)	MCS is an independent certification scheme for installers of microgeneration (renewable energy) and energy efficiency technologies, and the products.
PAS 2035	PAS2035: 2023 is the British Standard that provides a comprehensive framework for retrofitting existing homes to improve their energy efficiency and reduce carbon emissions. The standard outlines the entire retrofit process, including assessment, design, installation, testing, commissioning, handover, advice, and monitoring. It introduces several specialist roles, such as retrofit coordinators, designers, assessors, and advisors, specifying the qualifications and experience required for each. Compliance with PAS 2035 is mandatory for government-funded domestic retrofit projects.
PAS 2030	The PAS 2030: 2023 is a measures-specific certification for installers of retrofit measures in existing homes. PAS 2030 guidance outlines the requirements for competence, technical ability, and overall quality requirements that all installers must follow to meet the necessary standards and maintain quality of works.
TrustMark	<p>The only government-endorsed quality scheme for works carried out to residential properties. TrustMark licenses and works with a network of Scheme Providers – accreditation bodies and trade associations – who commit to meeting the operating requirements of the Quality Scheme.</p> <p>In turn, Scheme Providers license and work with their TrustMark Registered Businesses to ensure they commit to and maintain the required standards of technical competence, trading practices and customer service.</p>

Procurement

Term	Description
Dynamic markets	Introduced by the Procurement Act 2023, Dynamic markets are evolving arrangements of suppliers who have met the specified 'conditions for membership'. In practice, membership of the dynamic market acts as a quasi pre-qualification stage. When assessing tenders submitted during a procurement run, by reference to a dynamic market, contracting authorities must disregard tenders from any supplier that is not a member of the dynamic market, or the relevant part.
Most Economically Advantageous Tender (MEAT)	A bid evaluation process that must be followed when choosing who to award public contracts to under the Public Contracts Regulation 2015. MEAT may not be the lowest cost bid and is determined by evaluating bids against published award criteria to get the right supplier to deliver works, goods or services. MEAT is being replaced by MAT under the Public Procurement Act 2023.
Most Advantageous Tender (MAT)	Under the Procurement Act 2023 which is coming into force on or before 29 January 2025, a contracting authority may award a public contract to the supplier that submits the most advantageous tender in a competitive tendering procedure.
Open frameworks	A scheme of frameworks that provides for the award of successive frameworks on substantially the same terms
Open procedure	A single stage process. Tenders are advertised inviting supplies to respond by a set date. Submissions are evaluated according to a defined system of scoring. The winner is announced.
Invite to Tender (ITT)	A formal document issued by an organisation seeking to acquire goods or services.
Pre-Qualifying Questionnaire (PQQ)	Mainly used as an initial stage of qualification assessment for tendering. It is usually a box-ticking exercise to ensure you meet the minimum eligibility criteria for a contract.
Restricted procedure	A two-stage process. A Pre-Qualification Questionnaire is used to shortlist suitable suppliers. This is then followed by an Invitation to Tender, with a final decision made as in the open procedure.
Dynamic Purchasing System (DPS)	A Dynamic Purchasing System (DPS) is an electronic method of procurement that operates in a similar manner to a framework. They differ to a framework as suppliers can join a DPS at any time, making it a more dynamic market. Call-offs must be via a competition (mini tender exercises). Under the Public Procurement Act 2023, DPS is being replaced by Dynamic Markets.

Procurement framework	<p>A Framework brings together a pre-selected group of contractors for a particular area or work package under an 'umbrella agreement'.</p> <p>Buyers 'call-off' goods and services via mini competitions or direct award, avoiding lengthy tendering exercises. The resulting call-off contract will be a template contract, with many already-agreed elements that all suppliers sign up to when joining the framework. It is not a requirement to use the template contract or specification, these can be adapted or changed and priced during mini competitions.</p> <p>In some frameworks a purchaser can appoint a preferred supplier by direct selection.</p> <p>It is advisable not to choose frameworks organisations based on cost alone. Experienced framework organisations have specialist knowledge and will provide support through the procurement exercise.</p>
Public Contract Regulations 2015	Sets out the procedures that public contracting authorities must follow when procuring public contracts by tender. This is however being replaced by the Public Procurement Act 2023.
Public Procurement Act 2023	The Public Procurement Act 2023 is a new piece of legislation in the UK aimed at simplifying procurement processes for the public sector. It will replace existing rules for public contracts from January 2025.

Resident engagement

Term	Description
Cautions alert or do not visit alone (DNVA)	Each organisation may have its own approach and name for this – it is a system used by housing organisations to identify which properties require extra caution for safety. Training and risk registers should always be used too.
Equality, Diversity and Inclusion (EDI)	<p>Equality means offering the same rights and opportunities to all people.</p> <p>Diversity encourages us to embrace people's differences, including their beliefs, abilities, preferences, backgrounds, values, and identities.</p> <p>Inclusion means that all people, without exception, have the right to be included, respected, and appreciated as valuable members of the community.</p> <p>Taking EDI into consideration throughout the whole project is essential.</p>

National Tenant Engagement Standards, TPAS	Tenants Participation Advisory Service (TPAS) produces voluntary engagement standards to support housing providers in conversations with residents across all aspects of their work. The latest standards can be downloaded from the following link (registration required): Visit Website.
Resident Champions	Individuals who represent the needs and concerns of the wider resident community.
Resident engagement strategy	Sets out key priorities and the approach taken to engaging residents in discussions about important subjects such as retrofit.

Project management

Term	Description
Key Performance Indicator (KPI)	A target number in a chosen metric for projects to monitor progress. These can be economic, social or environmental. E.g. a customer satisfaction score or carbon savings unit.
Project manager	The key contact for all external consultants and contractors and will oversee all stages of the project.
Project organogram	A visual diagram that shows the project team structure.
Project plan	Defines the goals, timeline, tasks, resources and strategy for delivering a project.
Risk register	A list of the identified risks and their potential impact on the delivery of a project, on time and on budget.

