National Housing Retrofit Scheme
(One Stop Shop development call)

Programme Manager : Stephen Farrell
Contact : 018082117
Date: 08/09/2020

www.seai.ie
Workshop Objective

- Scheme Overview (2 streams, budgets, eligible projects)
- Key Dates & Deliverables
- Evaluation Process
- Self Scoring from Technical Workbook
- Quality & Delivery
- Brief Technical Workbook overview
- Completions & Payments
- Recommended Do’s & Don’ts

Scheme Queries:
- Stephen Farrell (stephen.farrell@seai.ie)
- Brian O Mahony (brian.omahony@seai.ie)  Midlands Private Retrofit.
- Josephine Maguire (josephine.maguire@seai.ie)  One Stop Shop Advice.
National Housing Retrofit Scheme:

- Overall Budget Allocation = €10M

- National Housing Retrofit Scheme. Budget €10M
  - Standard National Housing Retrofit Scheme Applications - €8M
  - Midlands Retrofit – Private Homes Integration Applications - €2M
Eligible Projects

**National Housing Retrofit Scheme Standard Application (€8M)**
- No geographical limitations,
- Companywide / finance provider district led application, or
- Regional applications.

**Midlands Retrofit – Private Homes Integration (€2M)**
- Associated with Local Authority areas in:
  - Galway
  - Kildare
  - Laois
  - Longford
  - Tipperary
  - Offaly
  - Roscommon
  - Westmeath
Submitting an Application:

- Open for submissions - Formally advised by BEC@seai.ie
- Open Call – until funding is allocated. (Tracker on website).
- Last Date to Submit Application – indicative 1st of December 2020.
- Submit your application to:
  - Stephen.Farrell@seai.ie  AND
  - BEC@seai.ie

- Await Email confirmation from SEAI.
Key Deliverables + Points:

- Min. BER Primary energy uplift required = 100kWh/m²/yr.
- B2 (minimum requirement).
- B3 and C1 permitted with prior SEAI approval and confirmation Part L compliant.
- Late delivery – scoring implications
- Contracted energy credits deviation, PM fee will be adjusted pro rata.
- Adherence to SEAI’s Technical Specification, SR54 and Relevant Standards.
- Max. BER project cost = €350 e.g. (€175 pre and €175 post BER) x % grant.
- Max. Grant €2M, Min. grant €100k.
<table>
<thead>
<tr>
<th>National Housing Retrofit Scheme – Standard Application (€8M)</th>
<th>Midlands Retrofit – Private Homes Integration – Application (€2M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A single application has no geographical limitations.</td>
<td>Within the Local Authority area of works.</td>
</tr>
<tr>
<td>Supports Private, LA &amp; AHBs</td>
<td>Supports Private Homeowners only.</td>
</tr>
<tr>
<td>No additional support for Energy Poor Homes.</td>
<td>Additional Energy Poor Support (80% grant support)</td>
</tr>
<tr>
<td></td>
<td><strong>No change Pre and Post BER support (35% for Private and 50% for AHBs)</strong></td>
</tr>
<tr>
<td></td>
<td>Pre-Ber on private homes will receive 80% grant support (incl. Non Energy Poor (NEP)). Built into TWB Post BER (35% for NEP &amp; 80% for EP) <strong>Awaiting sign off</strong></td>
</tr>
<tr>
<td></td>
<td><strong>No Change, Pre &amp; Post Bers will only be supported on homes that received retrofit works either 35% for Private or (50% for AHBs).</strong></td>
</tr>
<tr>
<td></td>
<td>10 times the number of homes in an application may receive 80% grant support on a Pre-BER with Advisory Report even though no upgrade works are completed. E.g. 10 homes in application (100 homes). <strong>Awaiting sign off</strong></td>
</tr>
<tr>
<td>Complete Standard National Housing Retrofit Scheme Applications Form on Website.</td>
<td>Complete Midlands Applications Form on Website.</td>
</tr>
<tr>
<td>Defined by your application.</td>
<td>Select preferred locations in application form.</td>
</tr>
<tr>
<td>No issue as max % funding is 35% or 50%</td>
<td>Overall max % funding 50%</td>
</tr>
</tbody>
</table>
Evaluation Process:

Evaluations – based on date application was submitted.

Scoring Criteria

✓ Self scoring (50 Marks)
  ▪ Value for Money (30 Marks)
  ▪ Technical Proposal (20 Marks)

✓ Quality & Delivery (50 Marks) (3 evaluators – scores averaged)
  ▪ Robustness (12 Marks)
  ▪ Resource + Experience (12 Marks)
  ▪ Customer Engagement (14 Marks)
  ▪ Integrated Finance (12 Marks)
Value for Money (self score)
€ / Primary kWh saved. 15 marks

<table>
<thead>
<tr>
<th>Total Cost (€) / Primary kWh saving</th>
<th>Marks</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;1.76</td>
<td>15</td>
</tr>
<tr>
<td>1.76-1.90</td>
<td>14</td>
</tr>
<tr>
<td>1.91-2.05</td>
<td>13</td>
</tr>
<tr>
<td>2.06-2.20</td>
<td>12</td>
</tr>
<tr>
<td>2.21-2.35</td>
<td>11</td>
</tr>
<tr>
<td>2.36-2.50</td>
<td>10</td>
</tr>
<tr>
<td>2.51-2.65</td>
<td>8</td>
</tr>
<tr>
<td>2.66-2.80</td>
<td>6</td>
</tr>
<tr>
<td>2.81-2.95</td>
<td>4</td>
</tr>
<tr>
<td>&gt;2.95</td>
<td>2</td>
</tr>
</tbody>
</table>

Application Form Tab – Tab 2
Table A

<table>
<thead>
<tr>
<th>Summary of Project Finances</th>
<th>Project Costs Euro (€)</th>
<th>Per kWh Saved Euro (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Eligible Costs</td>
<td>€</td>
<td>590,202.58</td>
</tr>
<tr>
<td>Total SEAI Grant</td>
<td>€</td>
<td>136,570.90</td>
</tr>
<tr>
<td>Grant %</td>
<td></td>
<td>35%</td>
</tr>
<tr>
<td>Total kWh Saved</td>
<td></td>
<td>158,320.00</td>
</tr>
</tbody>
</table>
## Value for Money

### € / m²

<table>
<thead>
<tr>
<th>Total Cost (€) / Total Floor Area (m²)</th>
<th>Value &amp; Efficiency Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 381</td>
<td>15 Marks</td>
</tr>
<tr>
<td>381 - 440</td>
<td>13 Marks</td>
</tr>
<tr>
<td>441 - 500</td>
<td>12 Marks</td>
</tr>
<tr>
<td>501 - 560</td>
<td>11 Marks</td>
</tr>
<tr>
<td>561 - 620</td>
<td>10 Marks</td>
</tr>
<tr>
<td>621 - 680</td>
<td>8 Marks</td>
</tr>
<tr>
<td>681 - 710</td>
<td>6 Marks</td>
</tr>
<tr>
<td>711 - 740</td>
<td>4 Marks</td>
</tr>
<tr>
<td>&gt; 740</td>
<td>2 Marks</td>
</tr>
</tbody>
</table>

### Tab 6 – u-Form Tab – Tab 2

#### Table A

<table>
<thead>
<tr>
<th>Summary of Project Finances</th>
<th>Project Costs Euro (€)</th>
<th>Per kWh Saved Euro (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Eligible Costs</td>
<td>€ 390,202.58</td>
<td>2.45</td>
</tr>
<tr>
<td>Total SEAL Grant</td>
<td>€ 135,570.90</td>
<td>0.85</td>
</tr>
<tr>
<td>Grant %</td>
<td></td>
<td>35%</td>
</tr>
<tr>
<td>Total kWh Saved</td>
<td></td>
<td>158,320.00</td>
</tr>
</tbody>
</table>
Technical Proposal

Average **Deemed** Energy Uplift (20 marks)

Reference – Domestic Energy Credit Table

<table>
<thead>
<tr>
<th>Energy Consumption</th>
<th>Marks</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; 300 kWh/m²/year</td>
<td>20 Marks</td>
</tr>
<tr>
<td>300 - 250</td>
<td>18 Marks</td>
</tr>
<tr>
<td>249 - 200</td>
<td>16 Marks</td>
</tr>
<tr>
<td>199 - 150</td>
<td>14 Marks</td>
</tr>
<tr>
<td>149 - 130</td>
<td>12 Mark</td>
</tr>
<tr>
<td>129 - 100</td>
<td>10 Marks</td>
</tr>
<tr>
<td>&lt; 100</td>
<td>0 Marks</td>
</tr>
</tbody>
</table>

Based on Deemed Credits
Quality & Delivery (50 marks)

- Robustness of Project Plan (12)
  - Project tendered,
  - key dates identified,
  - budgetary planning is robust,
  - QA provided,
  - risks identified and mitigated.

- Project Team Competence & relevant experience (12)
  - Delivery, Financial and Administrative Team identified
  - Relevant experience and competency. CVs /short biography
  - Project Team have successfully delivered
Quality & Delivery (50 marks contd.)

• Customer Engagement (14)
  ▪ Fully engaged with participants through an engagement or marketing plan
  ▪ Assurance of participant buy in.
  ▪ Handover documentation, i.e. Operation and Maintenance (O&M) manuals, training and commitment to post-occupancy follow up,
  ▪ Long terms delivery strategy

• Integrated Finance (12)
  ▪ An fully integrated delivery model, attractive low-cost financing product.
  ▪ An integrated delivery model, finance is on offer as part of the offering to householders.

• Reference scoring table in guidelines – cover all points where relevant.
Some Examples of Models for Routes to Engagement

Credit Union Model

- Credit Union
- Obligated Party or partner
- Advice, PM, Q/A
- Works
- Finance
- Contractors

Consumer Finance Model

- Obligated Party/Partner
- Advice, PM, Q/A
- Works
- Finance
- Contractors
- Consumer Finance e.g. Flexifi

Employer Model

- Employer
- Obligated Party/Partner
- Advice, PM, Q/A
- Works
- Finance
- Contractors
- Employer (or finance partner)

SEC Model

- Sustainable Energy Community
- SEC Mentors/ Energy Master Plan
- Advice, PM, Q/A
- Works
- Finance
- Contractors

Local Energy Agency Model

- Community Entities and Events
- Energy Agency
- Advice, PM, Q/A
- Works
- Finance
- Contractors

These are just some examples of delivery models, more will develop and be encouraged by this programme. In all cases it is envisaged that Energy Suppliers will have some role in projects, for instance this could be a financial contribution.
Technical Workbook in the Application Form
Ref: Tab 2 - 6
Application Form Detail – Tab 6 & Domestic Energy Credits Tab

Ensure All Tabs Complete.
Ensure Domestic Energy Credit Tab is fully captured
Say 8 homes Fingal Co Co

Tab 6 U-Value & Eff. data
Tab 5 – Domestic Energy Credits
<table>
<thead>
<tr>
<th>Project Category</th>
<th>Maximum % funding possible</th>
<th>% funding requested</th>
<th>No of Homes</th>
<th>Project Management Included</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Authority</td>
<td>50%</td>
<td>35%</td>
<td>8.00</td>
<td>No</td>
</tr>
<tr>
<td>Private</td>
<td>35%</td>
<td>0%</td>
<td>-</td>
<td>No</td>
</tr>
<tr>
<td>Private</td>
<td>35%</td>
<td>0%</td>
<td>-</td>
<td>No</td>
</tr>
<tr>
<td>Housing Association</td>
<td>50%</td>
<td>0%</td>
<td>-</td>
<td>No</td>
</tr>
<tr>
<td>Project Management Included</td>
<td>Name of Beneficiary</td>
<td>Project Cost</td>
<td>Fraction of Eligible VAT</td>
<td>Sub Total</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------</td>
<td>--------------</td>
<td>--------------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Yes</td>
<td>PingCo Co</td>
<td>100,000.00</td>
<td>0.135</td>
<td>113,500.00</td>
</tr>
<tr>
<td>No</td>
<td>PingCo Co</td>
<td>-</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>No</td>
<td>PingCo Co</td>
<td>-</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>No</td>
<td>PingCo Co</td>
<td>-</td>
<td>0</td>
<td>-</td>
</tr>
</tbody>
</table>

Total Project Cost from Domestic Credits Tab

<table>
<thead>
<tr>
<th>Total Project Cost</th>
<th>Eligible VAT</th>
<th>SEAL funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>107,000.00</td>
<td>13,500.00</td>
<td>42,175</td>
</tr>
<tr>
<td>7,000.00</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>0</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

7,000.00

Note: Only eligible VAT shown.

Sustainable Energy Authority of Ireland
Detail in Application Form

Tab 5 – Domestic Energy Credits summary

Tab 2 – Application form Tab Table A

Table A

<table>
<thead>
<tr>
<th>Summary of Project Finances</th>
<th>Project Costs Euro (€)</th>
<th>Per kWh Saved Euro (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Eligible Costs</td>
<td>€</td>
<td>120,500.00</td>
</tr>
<tr>
<td>Total SEAL Grant</td>
<td>€</td>
<td>42,175.00</td>
</tr>
<tr>
<td>Grant %</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Total kWh saved</td>
<td></td>
<td>73,150.00</td>
</tr>
</tbody>
</table>

Result of the table is calculation of residential credits

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Energy Use</td>
<td>291,000 kWh</td>
<td></td>
</tr>
<tr>
<td>Existing Energy Costs</td>
<td>208,071</td>
<td></td>
</tr>
<tr>
<td>Total Number of Credits</td>
<td>73,130 kWh</td>
<td></td>
</tr>
<tr>
<td>Energy Savings</td>
<td>52,293 kWh</td>
<td></td>
</tr>
<tr>
<td>Cost of Measures</td>
<td>100,000 €</td>
<td></td>
</tr>
</tbody>
</table>

**TECHNICAL WORKBOOK VIDEO DEMO**

https://www.seai.ie/grants/community-grants/project-criteria-and-funding/
Guidance on Measures

- Changes in addresses allowed.
- Change in measures possible subject to SEAI approval
- New measures **not** possible
  - E.g. if drylining not captured in Contract workbook, it cannot be added later.
- Single measures not permitted. (see BEH grant)
- Full window replacement (Every single window)
- Door replacement - 1 Front or 1 Back
- All pricing is fixed and by measure
- € / Sq. Meter price for fabric measures
- Alternative measure cells – airtightness, MVHR, etc…
ECMs savings

N.B - Engaging PES
Current deemed credits cease Dec 31, 2020
- Used to form application (built in TWB)
- VFM score €/kWh
- Form contracted savings

New savings are under consultation currently
- In place in Jan 01, 2021
- Applied to any work complete in 2021
- Based on final energy savings
- No kWh savings for Solar PV (confirmed already so removed from TWB)
- ECMs uploads post works = BER uplift x " in use factor "

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Energy Saving Credits:
All works to be completed as per Better Energy scheme Contractors Code of Practice and Standards and Specifications Guidelines. All measures must be installed in dwellings built before 2007 unless otherwise stated

<table>
<thead>
<tr>
<th>Measure</th>
<th>Minimum Specification - All measures installed must meet the minimum specification listed below</th>
<th>Energy Credits kWh/yr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roof Insulation</td>
<td>Insulation as per TGD L 2008: On the ceiling U-Value &lt; 0.18 W/m²K; On the outer wall U-Value &lt; 0.22 W/m²K</td>
<td>Apartment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>House</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>External Wall Insulation</td>
<td>To U-Value &lt; 0.37 W/m²K as per TGD 2008</td>
<td>3,750</td>
</tr>
<tr>
<td>Internal Dry Lining Wall Insulation</td>
<td>To U-Value &lt; 0.23 W/m²K as per TGD 2008</td>
<td>3,200</td>
</tr>
<tr>
<td>Cavity Wall Insulation</td>
<td>To U-Value &lt; 0.30 W/m²K</td>
<td>2,050</td>
</tr>
<tr>
<td>Floor Insulation</td>
<td>To U-Value &lt; 0.36 W/m²K</td>
<td>210</td>
</tr>
<tr>
<td>Full Window Replacement (incl. doors with &gt; 60% glazing)</td>
<td>To U-Value &lt; 1.4 W/m²K</td>
<td>1,050</td>
</tr>
<tr>
<td>Window glazing envelope replacement (includes doors with &gt; 60% glazing)</td>
<td>Minimum glazing envelope U-Value &lt; 1.8 W/m²K</td>
<td>450</td>
</tr>
<tr>
<td>Secondary Window Replacement</td>
<td></td>
<td>70</td>
</tr>
</tbody>
</table>
Works Completed

- Staggered completion preferred.
- Advisory Inspection - early in contract.
- Email confirmation - technical specifications adhered too and homes completed.
- Upload to SharePoint  (specific access assigned to PC)
  
  • Domestic inspection log
  • Domestic Certification + manuals
  • Schedule F and Data Consent Forms.
  • Upload Pre and Post BERs

Homes in the inspection log must have these docs uploaded to Sharepoint
Works Completed

Inspection Log

Read all Instructions and complete all cells.

<table>
<thead>
<tr>
<th>Fuel Poor</th>
<th>Is this a Deep Retrofit?</th>
<th>Property Type</th>
<th>Works Complete</th>
<th>Measure 1</th>
<th>Measure 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>N</td>
<td>House Mid Terrace</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
<td>House End of terrace</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
<td>House Mid Terrace</td>
<td>Y</td>
<td>N/a</td>
<td>Y</td>
</tr>
<tr>
<td>N</td>
<td>N</td>
<td>House End of terrace</td>
<td>Y</td>
<td>N/a</td>
<td>Y</td>
</tr>
</tbody>
</table>

Sub Contractor Company Name (per Measure) here >>>>
- Insulation Ltd
- Heating LTD

- Log 1 submitted 6/5/2020 - 2 advisory inspections (works fully complete)
- Log 2 submitted 10/7/2020 - 18 completed homes and 1 no Payment Claim for 20 homes submitted
- Log 3 submitted 15/8/2020 - 10 completed homes

Heating LTD
Insulation Ltd
Application Process

Read the Published Guidelines.

Complete the application form fully (All 6no TABs fully complete)

Complete the Participating Energy Supplier Declaration (Must have PES involvement)

Submit your application form via email to: Stephen.Farrell@seai.ie  CC BEC@seai.ie

NB: email subject line: National Housing Retrofit Scheme Standard Application: XXXProject.NameXXXX

Or Midlands Retrofit – Private Homes Integration Application: XXXProject NameXXXX

• Must get email confirmation from - Stephen.Farrell@seai.ie
• Evaluated Internally only.
• Where < 65 marks.
  • 5 working days to submit Draft 2 to Stephen.Farrell@seai.ie;  CC BEC@seai.ie
Receipt by SEAI of the below by the 15 October 2021

   a) A completed Payment Request Form & Grant Claim Workbook
   b) Invoices for all approved itemised eligible costs. Invoices should list energy upgrade measures included and identify the locations where these works were carried out.
   c) Proof of payment - Receipt from the contractor/supplier
   Beneficiary bank statement showing exact invoiced amount.
   d) Domestic Energy Credits uploaded to ECMS
   e) Declaration of Independence signed by BER assessor(s)
   f) Signed Client Organisation Declaration for Energy Credits
   g) BER & PM costs should be separately identified and invoiced.
   h) Under delivered energy credits – reduce PM fee (pro rata)

Payment guideline on Website
Do Recommendations

- **Read the guidelines fully.**
- Make beneficiary aware of proof of payment requirements.
- Consider extra time need for DEAP 4 an analysis.
- Complete the application form correctly.
- Ensure you have self scored.
- Request home owner deposits – shows commitment.
- Inform contractors and clients of time lines.
- Carefully review LoO if successful.
- Watch the application tracker and funding available.
Don’t Recommendations

- Don’t submit Payment requests for;
  - partially completed measures.
  - Partially completed homes.
  - homes with no post work BER.
- Leave documentation and certification uploads to final day.
- Expect exceptions – no extensions given.
- Ring us about the deadline or if funding is gone.
Q&A

Thanks for Listening