

# Routes to Retrofit

## COURSE CONTENT

Seminars cover:

- Considering objectives, priorities and getting the best result.
- Balancing time, cost and quality
- Regulations, approvals, and consents
- Which 'professionals' are needed - selection and appointment
- Selecting and appointing builders and using contracts
- Examining common pitfalls and avoiding them
- Getting the most for the resources you have available
- Exchanging ideas and energy with like-minded people – & sharing the pain!

## SEMINAR CONTENT IN DETAIL

### Session 1

- Your brief: Understanding and clarifying your aims, priorities, budget, programme and scope of works and expectations.
- Your team: Overview of who might be involved in your project and when, and importance of clear communication.
- Importance of the existing condition: Understanding where you're starting from.
- Funding Options: What's available, possible combinations and restrictions.
- Time, Cost and Quality: Getting the balance right and understanding the risks, and mitigating the energy efficiency 'performance gap'.
- Regulations and approvals: What you need to consider – planning, building regulations, party walls, health and safety etc. - and where responsibility lies.

### Session 2

- Appointing Professionals:
  - understanding what advice you need
  - range of different building professionals and their differing roles and responsibilities
  - examining quotes
  - forms of agreement
  - quality control
  - communications
- Choosing and appointing builders and contractors:

- Appropriateness for scope and type of work
- culture and communication – information required
- tender and selection processes
- aftercare
- Scheduling works: Whole house vs step-by-step, thinking about packages of works.
- Contracts:
  - Forms of contract including overview of ‘traditional’ vs ‘contractor design’
  - Risk management - dealing with ‘unforeseen extras’
  - Defects, warranties and aftercare

## **WORKSHOP LEADS:**

### **Marianne Heaslip, URBED**

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Marianne is a chartered architect with interests in urban design, sustainability and participative design. She holds an MSc in Advanced Environment and Energy Studies from the Centre for Alternative Technology, and is a Certified Passive House Designer. Marianne has experience in both new build and retrofit projects at a range of scales, with a particular focus on low-energy and sustainable design. She worked on two of the pioneering TSB ‘Retrofit for the Future’ projects with the lessons learned through this work applied in her role on the Carbon Coop’s retrofit ‘Community Green Deal’ programme. She is currently working on a number of retrofit and refurbishment projects across the North West – including as a member of Terrace 21 cooperative in Granby, Liverpool, where she plans to live.

### **Bill Taylor – MD of Taylor Armitt Consulting**

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Bill is the MD of Taylor Armitt Consulting and has been working in affordable housing for over 30 years. With qualifications in Town & Country Planning and Housing Policy, he has held development and asset management roles to Director level in several housing associations, where he developed an interest in co-operative housing and social enterprise. He formed his own consultancy in 2009. Bill focuses on enabling energy efficient improvement of housing, advising companies on business strategy and tendering, issues around Corporate and Social Responsibility, and adding and demonstrating Social Value. Bill has worked extensively with Fusion21 (a social enterprise he helped to establish in 2001), developing of their ‘retrofit’ offer for social housing and the wider market. This provides procurement frameworks and client advice on funding, energy efficiency and resident involvement. It adopts Fusion21’s proven training and employment model to encourage clients and the supply chain to develop the workforce that will deliver retrofit into the future. Bill is a qualified Domestic Energy Assessor and a Green Deal Advisor. Bill also advises housing associations on development issues, from strategy and policy through to processes and delivery. He also assists housing associations, consultants and contractors with procurement issues. His work in social audit involves advising on delivering, measuring and reporting on ‘social value added’ and he is a Social Accountant and Auditor with the Social Audit Network.