

Appendix 3 – LHEES Stage 2 Evidence Gathering and Consultation

A. Title of Proposal:	Scottish Borders Local Heat and Energy Efficiency Strategy 2024-2028
B. Service Area: Department:	Infrastructure & Environment Housing Strategy
C. Lead Officer: (Name and job title)	Donna Bogdanovic – Lead Officer (Head of Housing Strategy and Development) Neil Robertson – Principal Heat and Energy Efficiency Strategy Coordinator
D. Other Officers/Partners involved: (List names, job titles and organisations)	<p>The LHEES is an area-wide plan for the whole of Scottish Borders and not just the Council, it is crucial for the success of the LHEES to prioritise cross-party engagement and collective working. Engagement allows key stakeholders to raise their concerns or opportunities during the development stages, ensuring smooth and effective implementation moving forwards. The Council has previously engaged with stakeholders to develop the local energy efficiency policies such as the Affordable Warmth and Home Energy Efficiency policy, and continued this engagement throughout the LHEES process.</p> <p>The LHEES Project group has been established to oversee the development of LHEES. Members of this group include:</p> <ul style="list-style-type: none"> • Officers in the Housing Strategy, Policy and Development Team • Planning • Estates • Turner and Townsend • Changeworks <p>The Borders Home Energy Forum is overseeing the development of the LHS, this group includes senior officers at SBC and chief executives of the four local Registered Social Landlords (RSLs) and a range of other external organisations</p>
E. Date(s) IIA completed:	2 nd November 2023 8 th May 2024

Section 1 Data and Information

A. What evidence has been used to inform this proposal?

(Information can include, for example, surveys, databases, focus groups, in-depth interviews, pilot projects, reviews of complaints made, user feedback, academic publications and consultants' reports).

Developing the LHEES is at its core a data-driven process, although it is heavily informed by local knowledge and context, stakeholder engagement and building on existing local and national policies. The council has developed this LHEES in line with the LHEES Guidance issued by the Scottish Government as well as the LHEES Methodology issued by Zero Waste Scotland. These documents follow an eight-stage process summarised here:

Stage 1: Policy and strategy review

Identifying the local and national policies, targets and strategies that are linked to the LHEES and understanding how these will guide the development of the LHEES.

Stage 2: Data and tools library

Developing a library of all appropriate data and tools that supported analysis in subsequent stages of the LHEES.

Stage 3: Strategic zoning and pathways

First, establishing a baseline for the Scottish Borders region's existing building stock including: characteristics, energy efficiency levels and heat supply and performance. Second, this data was then analysed through the lens of the LHEES Considerations to develop a set of 'strategic zones'. Strategic zones provide an overview of the key challenges and opportunities across the region.

Stage 4: Generation of initial delivery areas

The data is used to generate potential delivery areas driven by the LHEES Considerations. These delivery areas define the opportunities in the form of potential projects which can be delivered by stakeholders with support from the council.

Stage 5: Building-level pathways assessment

Further analysis is carried out to assess the interventions required to decarbonise heating and improve energy efficiency in properties in each delivery area, including a quantification of financial costs and carbon reduction benefits. This is based on data analysis which defines interventions required and financial and carbon implications for buildings across the Scottish Borders.

Stage 6: Finalisation of delivery areas

Using the outputs from stages 1-5, the delivery areas are finalised into a set of projects after giving consideration to local priorities and any existing local programmes works.

Stage 7: LHEES Strategy

Based on the findings in stage 1-6, this LHEES Strategy document provides a short and long-term focus of LHEES at the strategic level.

Stage 8: LHEES Delivery Plan

The accompanying Delivery Plan sets out how the council will implement the LHEES through the next 5 years, based on the priorities identified by the LHEES Vision and building on existing progress made by the council.

SBC participated in a Local Heat and Energy Efficiency Strategies (LHEES) pilot for Peebles in 2018/19. The LHEES pilot project proved to be an interesting and worthwhile undertaking and allowed officers to gain a greater understanding of the process involved in undertaking an LHEES. Previous experience and activity in relation to this LHEES will inform development. SBC appointed consultants to support development of the LHEES ahead of delivery phase commencing in 2024. To focus the delivery SBC will recruit a dedicated LHEES Coordinator in 2023.

SBC have been working with Scottish Government and internal colleagues to develop the LHEES in line with government timings and prescribed phased approach, taking due consideration of the LHEES priorities for delivery. SBC have been engaging with key regional stakeholders and ensuring that the LHEES aligns with ongoing and existing priorities and council strategies and areas of delivery such as Climate Change and Sustainability. SBC procured for and appointed a dedicated consultant to support with the data analysis and identification of opportunity zones that are core to a structured and data led LHEES. Changeworks are supporting SBC across both LHEES and the EES:ABS scheme. This is particularly useful and relevant when looking at fuel poverty and domestic properties.

B. Describe any gaps in the available evidence,-then record this within the improvement plan together with all of the actions you are taking in relation to this (e.g. new research, further analysis, and when this is planned)

There will be a requirement for ongoing refinement and updating of data sets. Where building use has changed and evolved or where energy use or retrofit improvements work has been carried out, if this is not already accurately reflected in the data it will need doing so by the LHEES delivery team and the relevant data holders. Similarly point data will need to be updated if it is not spatially accurate or reflective. These type of gaps will be addressed throughout the course of the delivery of LHEES, as specific projects or areas of focus allow closer scrutiny of data and evidence. This type of activity will be typical of the work required to ground proof a potential heat network opportunity.

As Building Assessment Reports are completed for non-domestic building in the region, a database will be created to manage, collate and review the content. This in time will build into a useful database which will augment the existing data and allow further potential analysis of Heat Network opportunities. The LHEES team have set up a BARs inbox to receive completed BARS from the region. This activity has commenced and will continue across the LHEES delivery period.

Section 2 Consultation and Involvement

A. Which groups are involved in this process and describe their involvement

- Initial workshops to determine the scope of LHEES.
- Establishment of a project steering group within SBC to ensure joined up supportive work around the SBC estates, schools, buildings, carbon reduction.
- Stakeholders' mapping to identify key stakeholders to support the development and implementation of LHEES.
- Ongoing meetings with Registered Social Landlords (RSL) to understand the existing building stock and scheduled work that relates to energy efficiency and decarbonisation, the LHEES milestones and the best means of communication to facilitate the creation of LHEES.
- Ongoing meetings with the Distribution Network Operators (DNO) to discuss the potential role of SPEN in supporting the delivery of LHEES.
- Ongoing meetings with local estates, NHS, Police about their focus and plans that are align with the LHEES.
- Conducted interactive workshop to explore and discuss initial Delivery Areas and recommendations alongside the wider policy, strategy and delivery environment.
- Conducted interactive workshop to ask for feedback on the finalised Delivery Areas (incorporating analysis to date). Explore key actions, enablers and challenges to support content for LHEES Strategy and Delivery Plan.
- Developed a stakeholder engagement plan with scientific method such as deliberative approach to co-create the strategic long-term plan for decarbonise heat in buildings and improving their energy efficiency across and entire border areas; and gather interests from parties to act as the future drivers to support the delivery of plan.

B. Describe any planned involvement saying when this will take place and who is responsible for managing the process

Formal public consultation took place between 29th January 2024 - 8th March 2024
This was managed by Housing Strategy and Development

C. Describe the results of any involvement and how you have taken this into account.

A full report on the engagement and consultation has been carried out and is Appendix 8 of the supporting documents. This has included a full table of feedback and how this has helped inform the final LHEES 2024-2029.

D. Describe any events held and views obtained (if applicable). Add or remove as needed.

Section A describes the meetings and workshops which were undertaken to gather views. A full report on the engagement and consultation has been carried out and includes a description of the engagement undertaken. This is Appendix 8 of the supporting documents

Stage 3 Summary and Next Steps

Section 1 Summary

Summarise what you have learned then develop this further.

(Describe the conclusion(s) you have reached from the evidence, and state where the information can be found.)

Please consider the following:

What have you learned from the evidence you have and the involvement undertaken? Does the initial assessment remain valid? What new (if any) impacts have become evident?

Is the proposal not to proceed because of a disproportionate impact on equality or Fairer Scotland characteristics?

All evidence and engagement has been used to inform the final LHEES. This has been outlined in engagement and consultation report which provides a detail analysis of the feedback and how the feedback has been used to inform the final LHEES 2024-2029. (Appendix 8)

A. Please indicate if the proposal will proceed

Yes, please see below section 3 for next steps

Section 2 Sign Off

Signed by Lead Officer:	Neil Robertson and Donna Bogdanovic
Designation:	Principal Heat and Energy Efficiency Strategy Coordinator Head of Housing Strategy and Development
Date:	02/11/2023
Counter Signature Director:	
Date:	

Section 3 Monitoring and Review (complete if relevant, remove if not)

B. State how the implementation and impact of the proposal will be monitored, including implementation of any amendments? For example what type of monitoring will there be? How frequent?

A Delivery Plan has been developed in partnership with key stakeholders to set out the actions, initiatives, and programmes to support the delivery of LHEES. A LHEES Monitoring Tool will be produced annually to monitor the outcomes and actions, which will monitor progress and status of actions.

This will be monitored on a regular basis and an annual progress report will be developed.

C. What are the practical arrangements for monitoring? For example who will put this in place? When will it start?

The Housing Strategy Team will develop the Delivery Plan in partnership with key stakeholders. A progress report will be produced annually following the end of the financial year within the period of the LHEES 2024-29, with the first reports being produced during the start of financial year 2025/26.

D. When is the proposal due for review?

2029

E. Who is responsible for ensuring that this happens?

Housing Strategy and Development

F. Please indicate if you have developed an Action Plan to take forward any remaining actions

Yes