

Warm Homes: Grant Management System

Rolling Performance Tracking: Understanding Milestones and RAG Ratings

Reference: R2-06-G1 **Audience:** Grant Recipients (Social Housing Fund Awards) **System:** Grant Recipient Portal

Version: November 2025 **Classification:** OFFICIAL

 **Note:** This guide uses DESNZ training-environment demo data and reflects the system as of November 2025. For the best experience, have the GR Portal open alongside this guide and refer to the training video as needed. RAG ratings show how far you have progressed against your baseline – they are not an indicator of whether your project is failing.

Overview

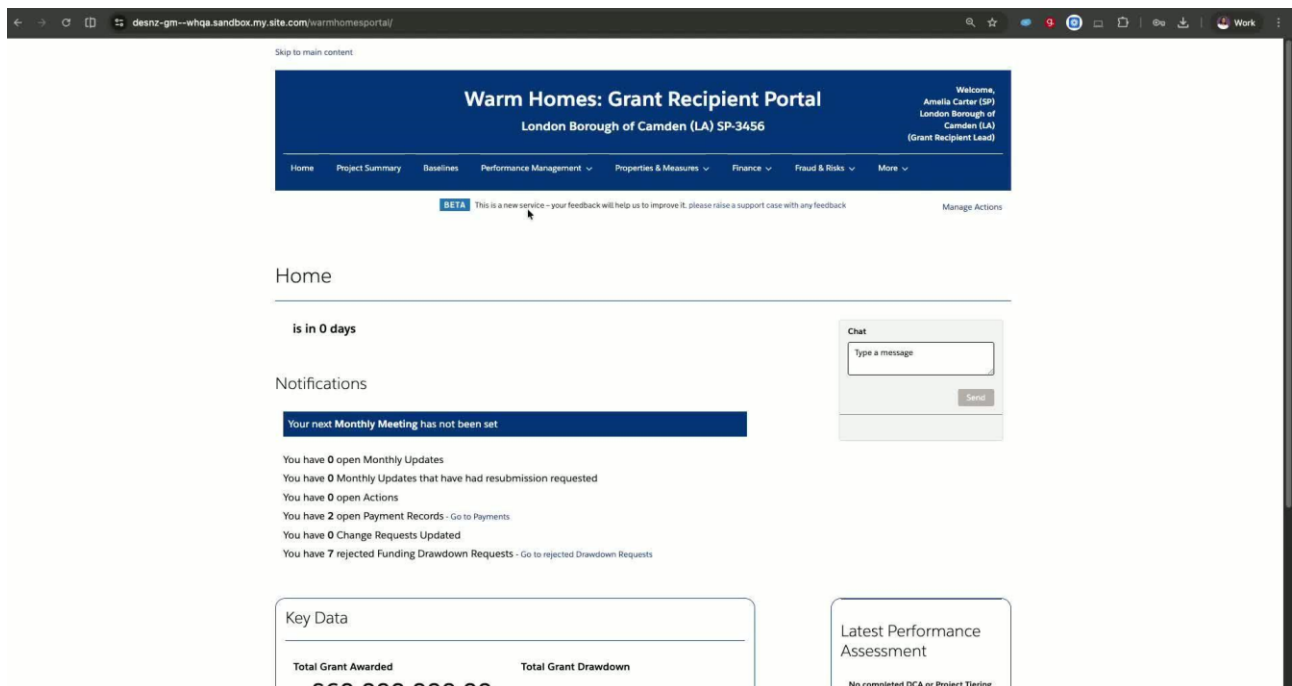
This training guide covers how to review and understand your milestone performance records in the GR Portal:

- Review the latest Milestone progress against Baseline KPIs
- Reading the Baseline vs Actuals comparison and understanding what the figures represent
- Interpreting RAG ratings correctly
- Submitting monthly reports to keep milestone records up to date
- Link Phases to Addresses

Section 1: Locating Your Milestone Records

Step 1: Navigate to Your Baselines [\[Video 0:47\]](#)

Log in to the Warm Homes Grant Recipient Portal. From the top navigation bar, select the Baselines tab. You will see your Award Baseline and either Financial Year Baselines for Strategic Partners, or Phase Baselines for Challenge Funds.



The screenshot displays the Warm Homes Grant Recipient Portal interface. At the top, there is a navigation bar with the following tabs: Home, Project Summary, Baselines, Performance Management, Properties & Measures, Finance, Fraud & Risks, and More. The 'Baselines' tab is currently selected. Below the navigation bar, the main content area is titled 'Home'. It features a notification stating 'Your next Monthly Meeting has not been set'. Below this, there is a section for 'Notifications' listing various updates and actions. At the bottom, there are two key data sections: 'Key Data' showing 'Total Grant Awarded' and 'Total Grant Drawdown', and 'Latest Performance Assessment' showing 'No completed DCA or Project Tiering'.



Step 2: Review Milestone Progress [\[Video 1:12\]](#)

Select a Baseline record to open it, then click the 'View Milestone Progress' button.

The screenshot shows a web browser window with the URL 'desnz-gm-whqa.sandbox.my.site.com/warmhomesportal/baselines'. The page displays the 'Milestones' tab for a specific baseline record.

Key Dates		
Baseline Start Date	Baseline End Date	
1 Apr 2025	31 Mar 2026	
Reporting Period Start	Reporting Period End	
1 Nov 2025	30 Nov 2025	

Milestone Status		
Milestone Reference	Financial Year 1-Baseline V1-ms	
Milestone RAG	RED	
Milestone Date Completed	10 Dec 2025	

Baseline vs Actuals		
Baseline Grant Capital Spend	Reported Actual Grant Capital Spend	% Grant Capital Spend
£20,000,000	£2,201,735	11
Baseline Co-Funding Capital Spend	Reported Actual Co-Funding Capital Spend	% Co-Funding Capital Spend
£10,000,000	£2,204,835	22
Baseline Total homes to be upgraded	Reported Actual Total homes to be upgraded	% Total Homes to be Upgraded
3,333	0	0
Baseline no. of Homes to EPC C	Reported Actual no. of Homes to EPC C	% No. of Homes to EPC C
3,333	10	10
Baseline Energy Savings (kWh)	Reported Energy Savings (kWh)	% Energy Savings (kWh)
1,000,000	72,078	7

Screenshot: Financial Year Baseline record showing the Milestones tab – Key Dates, Milestone Status (RAG: RED), and Baseline vs Actuals section

Each Milestone Record is created automatically when a monthly report is submitted and approved. Key fields in the milestone include:

- Milestone Reference – links back to the Baseline it was generated from
- Reporting Period Start and End – the period the milestone covers
- Milestone Date Completed – the date the monthly report was approved
- Milestone RAG – the RAG status based on the variance between your actuals and baseline at that reporting point



Note: Milestone records are cumulative. Each record reflects all reported actuals up to and including that reporting month – not just the values for a single month.

Section 2: Reading Baseline vs Actuals

Step 3: Understand the Baseline vs Actuals Section [\[Video 1:48\]](#)

Each milestone contains a Baseline vs Actuals section. This compares your approved baseline figures against what you have reported in your monthly reports to date.



desn2-gm-whqa.sandbox.my.site.com/warmhomesportal/baselines

Key Dates

Baseline Start Date	Baseline End Date
1 Apr 2025	31 Mar 2026
Reporting Period Start	Reporting Period End
1 Nov 2025	30 Nov 2025

Milestone Status

Milestone Reference
Financial Year 1-Baseline V1-ms

Milestone RAG
RED

Milestone Date Completed
10 Dec 2025

Baseline vs Actuals

Baseline Grant Capital Spend	Reported Actual Grant Capital Spend	% Grant Capital Spend
£20,000,000	£2,201,735	11
Baseline Co-Funding Capital Spend	Reported Actual Co-Funding Capital Spend	% Co-Funding Capital Spend
£10,000,000	£2,204,835	22
Baseline Total homes to be upgraded	Reported Actual Total homes to be upgraded	% Total Homes to be Upgraded
3,333	0	0
Baseline no. of Homes to EPC C	Reported Actual no. of Homes to EPC C	% No. of Homes to EPC C
3,333	10	10
Baseline Energy Savings (kWh)	Reported Energy Savings (kWh)	% Energy Savings (kWh)
1,000,000	72,078	7

Screenshot: Milestone record – Baseline vs Actuals showing grant capital spend, co-funding spend, total homes, homes to EPC C, and energy savings metrics with percentage complete for each

The section shows three columns for each metric:

- Baseline figure – your approved target from the Financial Year Baseline
- Reported Actual figure – the cumulative total from your approved monthly reports
- Percentage – the actuals as a percentage of the baseline (e.g. 11% means you have reported 11% of your baseline grant spend to date)

The metrics tracked include:

- Baseline Grant Capital Spend vs Reported Actual Grant Capital Spend
- Baseline Co-Funding Capital Spend vs Reported Actual Co-Funding Capital Spend
- Baseline Total Homes to be Upgraded vs Reported Actual
- Baseline No. of Homes to EPC C vs Reported Actual
- Baseline Energy Savings (kWh) vs Reported Actual

Baseline vs Actuals

Baseline Grant Capital Spend	Reported Actual Grant Capital Spend	% Grant Capital Spend
£20,000,000	£2,201,735	11
Baseline Co-Funding Capital Spend	Reported Actual Co-Funding Capital Spend	% Co-Funding Capital Spend
£10,000,000	£2,204,835	22
Baseline Total homes to be upgraded	Reported Actual Total homes to be upgraded	% Total Homes to be Upgraded
3,333	0	0
Baseline no. of Homes to EPC C	Reported Actual no. of Homes to EPC C	% No. of Homes to EPC C
3,333	10	10
Baseline Energy Savings (kWh)	Reported Energy Savings (kWh)	% Energy Savings (kWh)
1,000,000	72,078	7

Screenshot: Baseline vs Actuals data showing £20m baseline grant spend, £2.2m actuals (11%), and other KPI comparisons

 **Note:** For Challenge Fund Awards, Milestone records will include an additional section for Baseline vs Trustmark Lodgement data that shows an alternative comparison against monthly reported data

Baselines

Baseline Version

TLC2-Phase-1-Baseline V2

Latest Milestone: 5 March 2026

> Key Dates

> Milestone Status

> Baseline vs Actuals

✓ Baseline vs Trustmark Lodgements

Baseline No. of Homes which will not reach EPC C	Trustmark No. of Homes which will not reach EPC C	% No. of Homes which will not reach EPC C
0	0	0
Baseline no. of Homes to EPC A or B	Trustmark no. of Homes to EPC A or B	% No. of Homes to EPC A or B
15	0	0
Baseline starting No. of Social Homes EPC C-A	Trustmark starting No. of Social Homes EPC C-A	% Starting No. of Social Homes EPC C-A
23	0	0
Baseline starting No. of Social Homes EPC G-D	Trustmark starting No. of Social Homes EPC G-D	% Starting No. of Social Homes EPC G-D
32	0	0
Baseline Total Baseline Measures	Trustmark Total Baseline Measures	% Total Baseline Measures
12		0
Baseline Total homes to be upgraded	Trustmark Total homes to be upgraded	% Total homes to be upgraded
8		

Screenshot: Baseline vs Trustmark Lodgement data – This extra section is provided for Challenge Fund Award Grant Recipients only.

Section 3: Interpreting RAG Ratings

Step 4: Understand What Your RAG Rating Means [\[Video 2:42\]](#)

The Milestone RAG rating shows how your reported actuals compare against your approved baseline targets for that reporting period. It measures variance – how far through your planned targets you are – and is not a judgement about whether your project is succeeding or failing.

The RAG rating thresholds are:

- Green – On track (variance of 10% or less)
- Amber Green – Minor risk (11–20% variance)
- Amber – Moderate risk (21–30% variance)
- Amber Red – Major risk (31–40% variance)
- Red – Significant variance (41%+)

 **Note:** A Red RAG does not mean your project is failing. It means your reported actuals are currently below your baseline profile. This is normal at early stages of a project. If you have concerns about your RAG rating, speak to your PSO or Delivery Support Manager.

Step 5: Keep Milestone Records Up to Date

Milestone records are only created or updated when a monthly report is submitted and approved in the Portal. To ensure your milestone data is accurate and current:

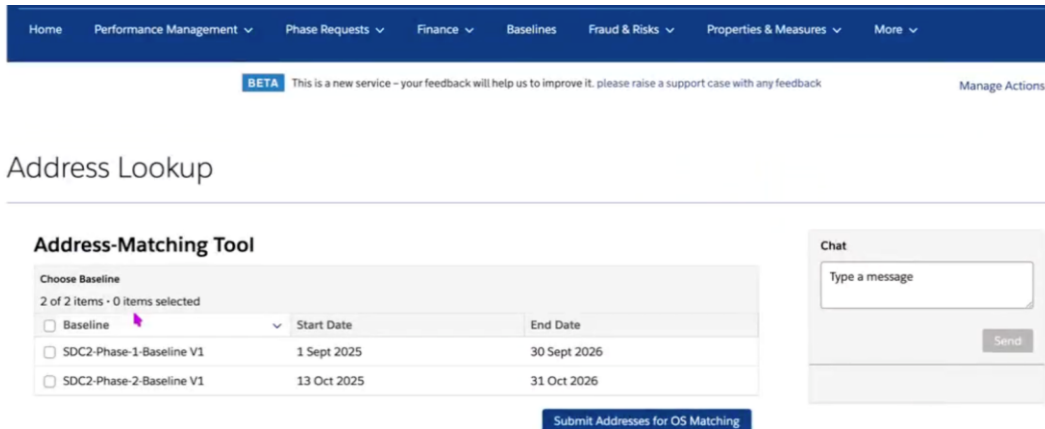
- Submit your monthly reports on time each reporting period.
- Ensure your PSO approves them promptly.
- Check your Milestones Progress after approval to confirm a new record has been generated.

Section 4: Challenge Fund Awards: Link Phases to Addresses

Step 6: Use the Address-Matching Tool For Challenge Fund awards [\[Video: 3:36\]](#)

The Portal includes a feature that allows you to link specific addresses directly to your active phase baselines.

- Navigate to the tool: From the top navigation menu, select Properties & Measures, then click Address Lookup.
- Choose your baseline: In the Address-Matching Tool, you will see a list of all active phase baselines associated with your funding award. Select the checkbox next to the specific phase baseline you want to add addresses to.



Home Performance Management Phase Requests Finance Baselines Fraud & Risks Properties & Measures More

BETA This is a new service – your feedback will help us to improve it, please raise a support case with any feedback [Manage Actions](#)

Address Lookup

Address-Matching Tool

Choose Baseline
2 of 2 items · 0 items selected

Baseline	Start Date	End Date
☐ SDC2-Phase-1-Baseline V1	1 Sept 2025	30 Sept 2026
☐ SDC2-Phase-2-Baseline V1	13 Oct 2025	31 Oct 2026

[Submit Addresses for OS Matching](#)

Chat
Type a message
[Send](#)

- Enter addresses: Once a baseline is selected, a text box will appear allowing you to paste your addresses.
 - You can paste a list of up to 100 addresses at a time.
 - Each address must be placed on its own separate line.
 - You must use the exact format: Home Name/Number, Street, Town/City, Postcode.

Address Lookup

Address-Matching Tool

Please paste in a list of up to 100 addresses, with each one on its own line in the following format
Home Name/Number, Street,Town/City,Postcode

Please ensure the required fields, marked with an asterisk (*), is completed before submitting the form.

Paste up to 100 addresses, each on a separate line (* Required)

31/Bluebell Dene/Newcastle upon Tyne/NES 4DF
24/Fern Avenue/Newcastle upon Tyne/NE3 2AL
6/Bellgrove Road/Newcastle upon Tyne/NE3 3BT

Please confirm these addresses have completed the Design and Co-ordination stage in the PAS 2035 process and residents have been signed up and provided with a Privacy Notice (*Required):

☐ Confirm

Submit Addresses for OS Matching

Chat

Type a message

Send

- Confirm and submit: Review the compliance notice regarding the Design and Co-ordination stage, select the Confirm radio button, and click Submit Addresses for OS Matching.
- Wait for matching: The system will begin processing the addresses, which may take a few moments. If the count has not reached the total, click the Refresh button every few moments until the results appear.

Quick Reference Summary

Task	Where / How
Find milestones	Top nav → Baselines → Baselines → View Milestone Progress
Understand a milestone record	Key Dates + Milestone Status
Understand Baseline vs Actuals	Your actuals as a % of your baseline target – not a pass/fail score
RAG rating	Shows variance from baseline. Red = 41%+ below plan, not a failing project
Update milestones	Submit and get monthly reports approved in the Portal
Link Phases to Addresses	Properties → Address Matching Tool → Select Baseline

For questions about your milestone records or RAG ratings, contact your PSO or raise a support case via the GR Portal.