

WH:SHF Challenge Fund

Stage 4 - Monitoring Your Phases

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RISE

Retrofit information,
support & expertise

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Turner & Townsend

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Why Monitoring is Important

Monitoring your phases is about regularly checking that **delivery, funding and approvals** remain **aligned** as your project progresses.

It helps you to:

- Understand what has already been approved
- Track funding used and funding remaining
- Identify issues early
- Plan your next phase with confidence

Monitoring is not a separate process – it builds directly on planning a phase and understanding Phase Requests.

You should review and monitor your phases:

- After a new phase is approved.
- After submitting a grant drawdown.
- When delivery plans change.
- When planning a new phase request.

Regular monitoring helps ensure future Phase Requests remain realistic, deliverable and aligned with funding allocations.

Using the GRP Dashboard to Monitor Progress

Use the Grant Recipient Portal (GRP) dashboard as your primary reference point. This will provide real-time information on your project.

- Grant and co-funding:
 - How much has been approved
 - How much remains available
 - How much has been drawn down and what remains available to drawdown.
- Financial year position:
 - How approved phase spend is split by financial year
 - Whether you are approaching FY grant or co-funding limits
- Approved phases:
 - Which phases are approved and which financial years they cover
 - Whether approved phases still reflect expected delivery timing

Regularly reviewing the dashboard helps you spot risks early and avoid issues when planning your next phase.

Key Data

Total Grant Awarded £31,000,000	Total Grant Drawdown 31
Total Homes to be Upgraded 6,000	Actual Homes Upgraded 31
Social Housing Key Data	
Baseline Total Grant Spend £31,000,000	Total Co-Funding Spend £30,000,000
	Total Co-Funding Spend FY 24/25 £0
Total Grant Spend FY 25/26 £10,000,000	Total Co-Funding Spend FY 25/26 £10,000,000
Total Grant Spend FY 26/27 £11,000,000	Total Co-Funding Spend FY 26/27 £10,000,000
Total Grant Spend FY 27/28 £10,000,000	Total Co-Funding Spend FY 27/28 £10,000,000
	Total Co-Funding Spend FY 28/29 £0
Total Drawdown to Date ⓘ	Total Grant Funding Remaining to Drawdown ⓘ

Financial Year 25/26	
Phase Grant Costs to Date FY 25/26 £8,500,000	Total Remaining FY 25/26 £1,500,000
Drawdown to Date FY 25/26 £8,500,000	Grant Funding Remaining to Drawdown FY 25/26 £1,500,000
Financial Year 26/27	
Phase Grant Costs to Date FY 26/27 £7,000,000	Total Remaining FY 26/27 £4,000,000
Drawdown to Date FY 26/27 £1,000,000	Grant Funding Remaining to Drawdown FY 26/27 £6,000,000
Financial Year 27/28	
Phase Grant Costs to Date FY 27/28 £0	Total Remaining FY 27/28 £10,000,000
Drawdown to Date FY 27/28 £0	Grant Funding Remaining to Drawdown FY 27/28 £10,000,000

Using Planning Tools for Monitoring

The phase planning tools are not one-off submission tools — they should be used throughout your project to support delivery. They should be updated regularly for maximum impact.

1. Financial Year Alignment Tool

- Keep approved phases up to date
- Add planned future phases as they develop and experiment with costs
- Monitor differentials across grant and co-funding
- Check whether you are on track to fully utilise allocated funding

2. Cost Caps Planning Tool

- Monitor cost cap position across all phases
- Check higher-cost phases in the context of the whole project
- Track A&A spend at a project level

Using these tools regularly helps ensure future phase requests are better planned and less likely to require revision.

Monitoring Checklist: Scheme Compliance & Delivery

Use monitoring to check alignment between approved phases and delivery.

- Delivery position:
 - Are start and end dates still realistic?
 - Has delivery moved into different financial years?
- Assumptions and justifications:
 - Are there elements that may need explanation in future phases?
 - EPC assumptions
 - High-cost homes
 - Partially completed retrofit assessments
 - Inclusion of non-social homes
- Change awareness:
 - Identify early if delivery changes may impact future phases.
 - Monitoring early reduces delays caused by late change control.

Monitoring supports preparedness. Monitoring also feeds directly into planning your next phase request or change control where necessary.

Support

Use this checklist alongside:

- The GRP dashboard
- The Phase Planning Toolkit
- The Phase Request guidance

If delivery assumptions change, or you're unsure how monitoring impacts your next phase:

- Speak to your DSM
- Contact RISE to book in Direct Advisory Support (DAS)
- Attend drop-ins or masterclasses found on the RISE website

Phase Request: Resources

- Stage 1: Introduction to Phase Requests
- Stage 2: GR Phase Planning Toolkit Walkthrough
- Stage 3: GR Phase Request Submission Walkthrough
- Phase Request Planning Tool (excel)

Return to the Phase Request page for other stages

Thank you!

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Website: [Home](#) | [Retrofit Information, Support and Expertise \(riseretrofit.org.uk\)](#)

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