



RISE

Retrofit information,
support & expertise

Getting it right: How to Meet Reporting Requirements

Quick guide

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Contents

Introduction.....3

Data 3

 Best practices 3

 Correct KPI reporting: 4

Top tips.....5

 Local Grant DSM tips 5

 Social Housing Fund DSM tips 6

Summary 6

 Resources:.....7

Introduction

This quick guide highlights key reminders for meeting reporting requirements, with KPI reporting insights and practical tips from DSMs.

Readers that would like this document in a more accessible format should contact rise@turntown.co.uk.

Data

Best practices

To support reliable reporting and meaningful insights, it's important that data is submitted correctly and consistently. The following best practices provide a simple guide to getting it right first time.

- **Being accurate**
 - Having data correct and free from errors can help drive better decision making. It can also aid in improving efficiency, as less time will be spent investigating discrepancies or correcting errors.
- **Being complete**
 - Ensuring all required data fields are filled helps provide a full and accurate picture of performance. Complete data reduces gaps in reporting and enables better analysis and decision-making.
- **Being timely**
 - Submitting up-to-date data on time ensures information is available when needed for reporting and decision-making. Timely data supports proactive action and helps avoid delays or missed deadlines.
- **Being unique**
 - Avoiding duplicate or redundant entries helps maintain data clarity and reliability. Unique data prevents double counting and ensures reporting reflects true performance.
- **Being consistent**
 - Entering data in a standardised way across records and datasets improves comparability and reliability. Consistency makes it easier to analyse trends and reduces confusion or misinterpretation.
- **Being valid**

- Ensuring data is appropriate and entered in the correct format for its context improves overall data quality. Valid data supports accurate reporting and prevents errors in downstream processes.

Correct KPI reporting:

GRs must submit KPI reporting data for progress in that one-month period of reporting.

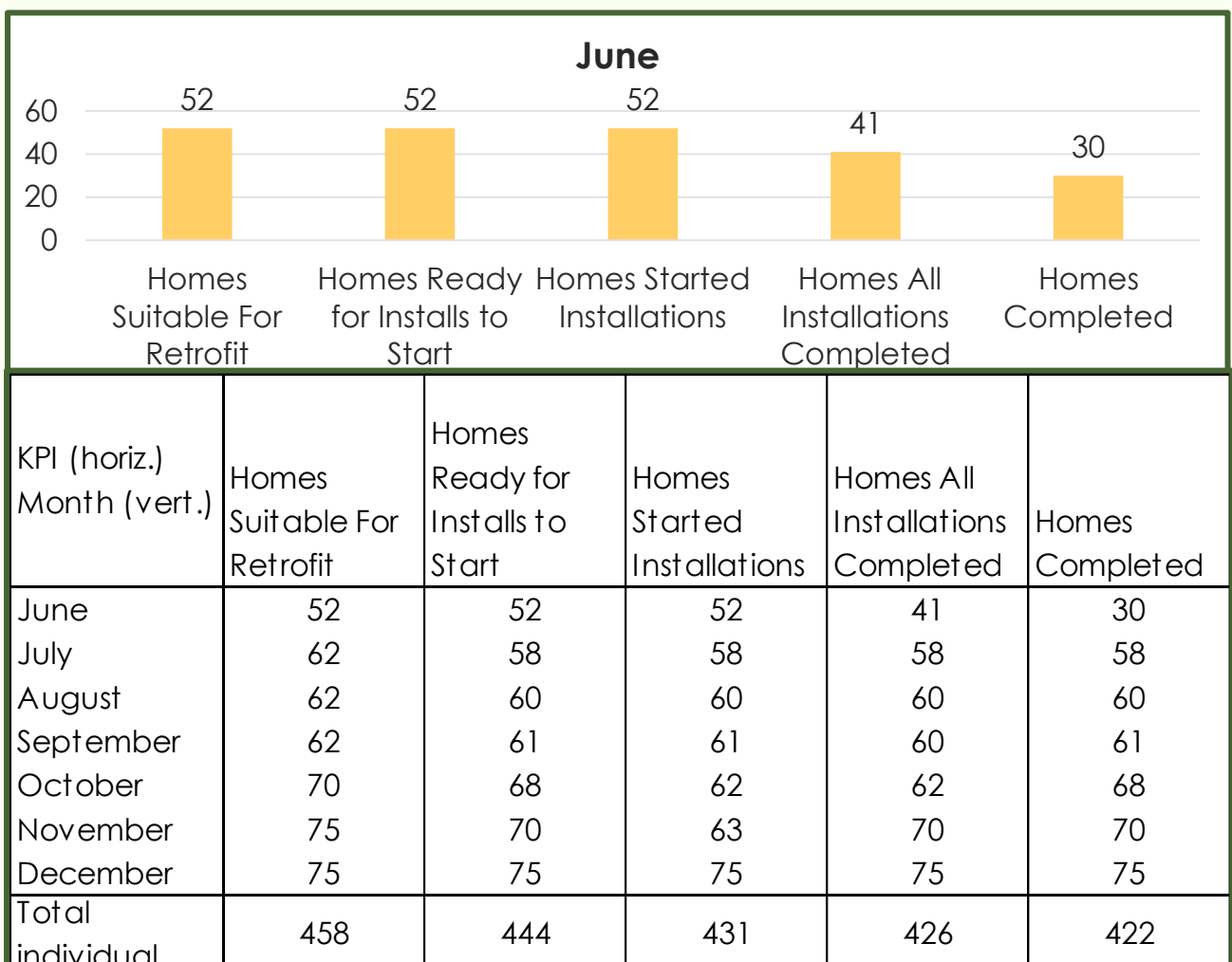
To do this correctly the **sum of the five “homes” KPI fields** in the GRs monthly submission must not exceed the number of homes set in the **parent baseline** for that record.

- The parent is either the Phase baseline for SHF CF or the Financial Year baseline for LG and SHF SP.

When a GR does their monthly data submission, they submit their 'Update', 'Actuals' and 'Forecast'.

For **SHF Challenge Fund**, the 'Update' form has additional KPI 1 & 2 fields for in month values.

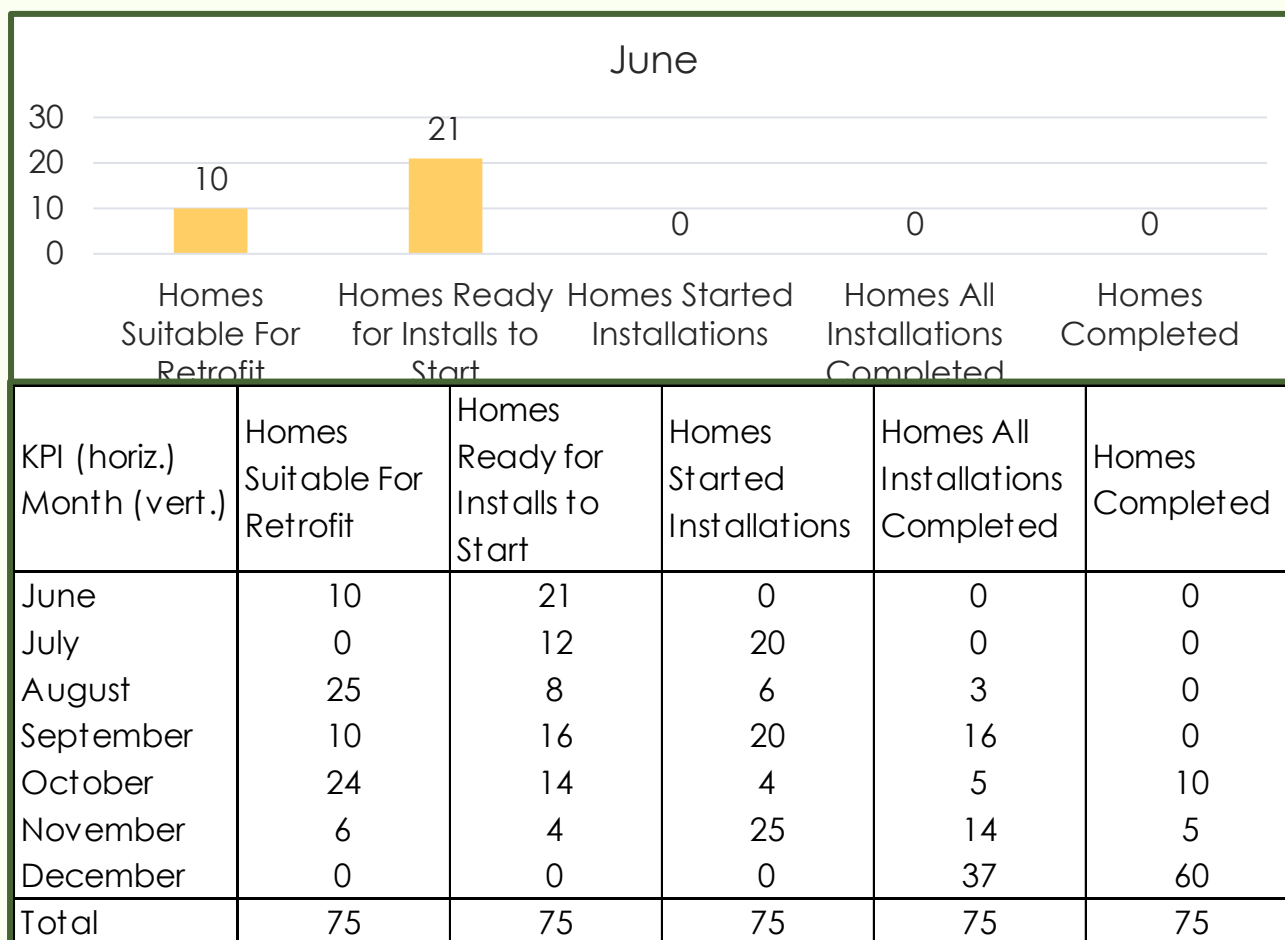
Example of **incorrect** KPI reporting



In this example the GR is reporting cumulatively rather than just on the progress made in that month i.e. July includes all of the June data and the July data which is incorrect.

July should only include the progress made in July. In addition it is important that you only report the final position of a home in its progress that month i.e. if a home has completed both KPI 2 and KPI3 in one month then you only report that home against its final position at KPI 3 for that month.

Example of **correct** KPI reporting:



In both cases, the number of homes agreed that will be completed during the current baseline is 75. The above example is **correct** as data has been **submitted as actuals** and **not cumulatively**.

Top tips

Based on their experience supporting reporting processes, Delivery Support Managers (DSMs), offer key tips to help ensure submissions meet required standards and deadlines.

Local Grant DSM tips

Early Monthly Reporting

- Submitting your monthly report as early as possible in the calendar month means there is no room for error, reporting on figures for the current month, during the previous reporting period.

Communication with your DSM

- If you encounter any delays in reporting, make sure to report it to your DSM as soon as you can.
- Good communication helps to make sure you stay aligned. It helps to enable quick problem-solving as discrepancies or questions can be raised easier thus preventing delays.

Audit records with your Delivery Partner

- Maintain clear and organised records for audit purposes, and work with your delivery partner to ensure figures are provided in a format that can be easily transferred into reporting.
- Establish a robust audit trail for transactions, change requests batch updates etc., to support transparency and traceability.

Social Housing Fund DSM tips

Reporting as essential project task

- Take the time to complete reports thoroughly, ensuring that all data entry aligns with best practices and maintains a high level of accuracy.
- For GRs who may not already do so, it is important to view reporting as a key monthly project task, rather than an obligation to be completed quickly just before the deadline.

Internal deadlines and tracker

- Have a set tracker, alongside setting some time to complete reporting.
- Additionally set internal deadlines to see to that uploads are timely and factor in any unforeseen issues.

Consider the reviewer

- Assume that the reader has no prior knowledge of the project, as it may not always be your DSM reviewing the information.

Assistance and DAS support

- Request assistance from your DSM for Direct Advisory Support (DAS) on Data & Reporting if you are struggling. One-to-one support is available, and the team are always happy to help!

Summary

The above points outline key best practices for accurate data entry, effective KPI reporting, and practical insights gathered from DSMs. This document is designed to serve as a helpful guide when completing your monthly reporting requirements,

supporting you in producing work that is both thorough and high quality. By following this guidance, you can ensure consistency, improve accuracy, and approach reporting as a structured and valuable part of your overall responsibilities.

Resources:

RISE Knowledge Hub – [Retrofit project management](#)



www.riseretrofit.org.uk



RISE – Retrofit information, support & expertise