RISE | Retrofit information, support & expertise

Getting Data Right for Successful Delivery

Quick guide

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Summary

This quick guide has been developed to help housing providers, Grant Recipients (GRs), and delivery partners (DPs) to understand **why good data is critical to retrofit delivery**, and **how to manage data effectively** across Warm Homes and similar funded programmes. Retrofit projects rely on data at every stage - from eligibility and design through to installation, claims, and audit. Where data is poor, incomplete, or inconsistent, projects face increased risk, delays, payment issues, and potential funding clawback. Conversely, good data supports confident decision-making, smoother delivery, and better outcomes for residents.

This guide provides a practical overview of how data should be treated as a core delivery tool, not just a reporting requirement. It highlights where data commonly fails, what good practice looks like, and what project teams can do before, during, and after delivery to reduce risk.

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

Why data matters in retrofit projects

Data-driven retrofit delivery

Nearly every decision in a retrofit programme relies on accurate and reliable data. This includes decisions about which homes are eligible, which measures are appropriate, how works should be sequenced, and whether funding can be claimed and audited successfully.

Poor data does not simply slow projects down - in many cases it can prevent delivery from progressing altogether.

Good data enables retrofit programmes to demonstrate compliance, manage risk, and plan delivery with confidence.

Data supports:

- **Compliance** with scheme rules and PAS 2035.
- **Assurance** that funding is spent correctly.
- Accurate **planning and forecasting**.
- Early **identificatio**n of delivery risks.
- Improved contractor **productivity and sequencing**.

Beyond compliance, strong data practices unlock wider benefits. Projects are better able to refine delivery plans, target homes more effectively, and report meaningfully on outcomes such as carbon reduction, energy savings, and resident benefit.

What good data looks like

Good retrofit data is **not about collecting as much information as possible**. It is about collecting **the right data**, in the right way, and managing it consistently.

At a practical level, good data is:

- Accurate and reflective of on-site reality.
- Complete, with no gaps in eligibility, EPCs, or evidence.
- Up to date, avoiding reliance on outdated records.
- Structured and consistent across teams and partners.
- Secure and auditable, with clear version control.
- Relevant to delivery, funding, and assurance needs.

Small issues - such as inconsistent address formats, mixed energy units, or missing UPRNs - often appear minor but **can cause significant delays** during claims and audits. Addressing these issues early through simple standardisation can substantially reduce downstream risk.

The lifecycle of data in retrofit projects

Data required across project delivery

Data does not sit in one place or belong to one stage of delivery. It flows from early stock analysis and assessments through to installation, reporting, audit, and evaluation.

Decisions made early in the project lifecycle have consequences months later. For example, inaccurate EPC data used during planning can result in inappropriate measures being specified, leading to redesign, delays, or ineligible spend during delivery.

The six stages of retrofit delivery (PAS 2035)

Retrofit projects broadly follow six interconnected stages:

1. **Intended outcomes** - defining what the project is aiming to achieve, such as minimum EPC ratings or heat demand reduction.
2. **Risk assessment** - identifying dwelling-level and programme-level risks associated with proposed works.
3. **Dwelling assessment** - retrofit assessments undertaken by qualified professionals and reviewed by a Retrofit Coordinator.
4. **Planning and design** - option appraisal, measure selection, and development of medium-term plans.
5. **Installation and handover** - delivery, testing, commissioning, and resident handover.
6. **Monitoring and evaluation** - evidencing outcomes, learning lessons, and demonstrating impact to funders.

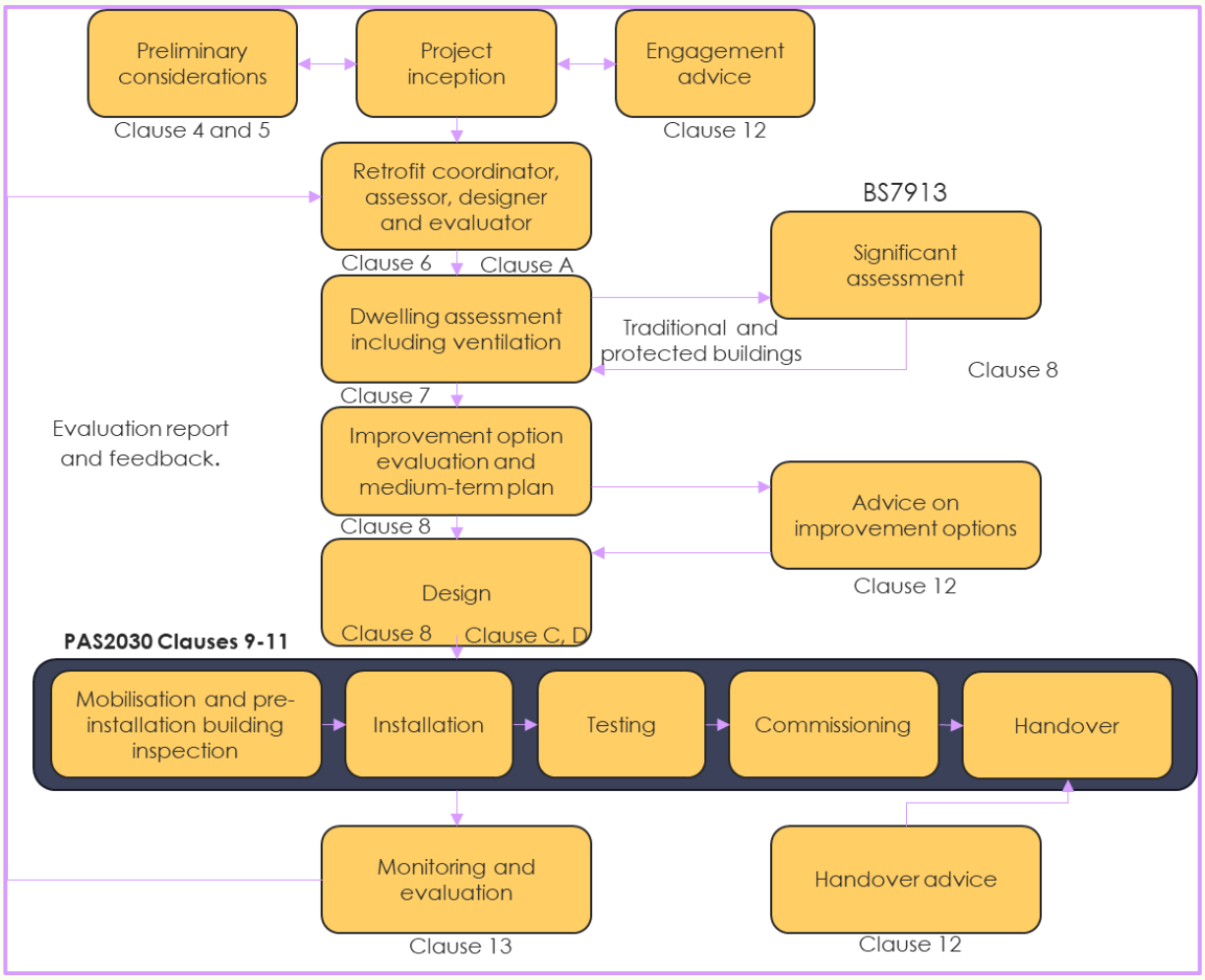


Figure 1: Six stages of retrofit delivery (Source: PAS2035:2023)

Data quality underpins *every stage*. Weak data used at the start of your project are often only discovered during claims or audit.

Common data failures: how they impact projects

Most projects do not fail due to complex technical systems. Instead, they encounter **repeatable, avoidable data issues**, such as incorrect UPRNs, missing eligibility evidence, or disconnected datasets.

These failures commonly result in:

- Ineligible homes receiving measures
- Incorrect measures being specified
- Delays to claims and payments
- Audit failures and exposure to clawback

In many cases, these risks **could have been reduced** through early validation, clear data ownership, and consistent storage of PAS 2035 documentation and evidence.

Data failure	How they impact projects
Wrong UPNs	Measures delivered to ineligible homes
Missing eligibility evidence	Funding clawback
EPC errors	Wrong measures specified
Unvalidated stock lists	Overclaiming properties that can't be accessed
Disconnected systems	Double data entry, inconsistent versions
PAS 2035 documents not linked	Audit failures
Incomplete photos / evidence	Payment delays

Practical steps to get data right

Before delivery
Before works begin, project teams should establish clear foundations for how data will be managed. This includes agreeing who is responsible for collecting and maintaining key data, setting up secure and structured storage, and validating core datasets such as UPRNs, EPCs, and eligibility evidence. Taking time at this stage reduces the likelihood of redesign, rejection, or delay once delivery is underway.

During delivery
During live delivery, data should be actively used rather than left untouched until reporting milestones. Regular data checks help teams validate contractor submissions, track access issues and vulnerabilities, and identify emerging risks early. Aligning data reviews with delivery rhythms allows issues to be resolved before they affect programme timelines or claims.

After delivery
Data responsibilities do not end when works complete. Projects should carry out evidence audits to ensure documentation is complete and traceable, review data quality to capture lessons learned, and store information securely for the required retention period - typically at least seven years for grant-funded programmes. This protects projects during audit and supports future funding opportunities.

Using data to improve decision making

Data should not exist purely to satisfy reporting requirements. When used well, it actively shapes **better delivery decisions**.

For example, data can help teams identify which measures deliver the highest carbon savings, forecast installer productivity, spot cost pressures early, and target resident engagement where access risks are higher.

In this way, data helps demonstrate impact as well as compliance, strengthening both **delivery outcomes** and **funding assurance**.

Data governance and compliance

Strong data governance enables delivery rather than blocking it. Governance should be proportionate to programme scale and risk and embedded into **day-to-day project management**.

Effective governance typically includes clear data definitions, validation checks, version control, secure storage, role-based access, and clear audit trails. Together, these measures reduce compliance risk, support audits, and give funders confidence in delivery.

Projects must also **meet GDPR obligations** by handling personal data lawfully, securely, and transparently, and by collecting only what is genuinely required.

Next steps

You should now have a clearer understanding of how data supports effective retrofit delivery and where common risks arise.

Your next steps are to:

- **Review** your current data practices against the principles in this guide.
- **Identify** where early checks could reduce delivery risk.
- **Introduce** simple standards or templates where gaps exist.
- **Treat** data quality as a shared responsibility across all delivery partners.

Improving data maturity is about steady, practical progress - not perfection.

Link to referenced resources

- RISE Knowledge Hub resources
- PAS 2035:2023
- RISE Grant Recipient Portal training materials