THE REVIEW

UK social landlords - environmental performance

2014/15

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Wienerberger’s vision for the future

Founded in Vienna in 1819, Wienerberger is a leading provider of wall, roof and landscaping innovations. Since its establishment the company has grown to hold the title of the world’s largest brick manufacturer and No. 1 on the clay roof tiles market in Europe with its UK operation standing at the forefront of the battle for nurturing sustainability within the construction industry.

As part of its commitment to building better homes, for both end users and the environment, Wienerberger has undertaken a number of initiatives to reduce the impact its products make upon the environment whilst developing housing concepts that will revolutionise the industry.

Evidence of such product innovation is the introduction of Porotherm – a unique clay block walling system. Porotherm is becoming increasingly popular in the UK thanks to its exceptionally fast, virtually dry construction combined with high strength and thermal efficiency. It is also a simple system to use.

One of the things that makes Wienerberger stand out from other manufacturers is that the drive to build a better future goes beyond the products it makes. It has evolved into the creation of building concepts. The Wienerberger e4 brick house™ concept was developed to address the need for affordable, sustainable housing in the UK. Designed in conjunction with global engineering and design consultancy, ARUP, the e4 brick house™ model focuses on the four pillars of Wienerberger’s global e4 concept – energy, economy, environment and emotion.

Suitable for a wide range of house sizes and typologies the Wienerberger e4 brick house™ utilises a fabric first approach using a clay building envelope. This minimises the energy needs of the home and the related costs, a significant benefit for homeowners with the average energy bill exceeding £1300 per annum.

The Wienerberger e4 brick house also utilises BIM (Building Information Modelling) which aids every stage of the construction process, through planning, building and ultimately, the operational lifespan of the development.

For more information on Wienerberger, our products or the e4 brick house concept please visit www.wienerberger.co.uk
Social landlords are building more new homes, despite cuts to the grant challenging viability and business models. They are building the type of homes that are needed, where they are needed: refreshing the parts others can’t reach. As exemplified by the lead role of the National Housing Federation in the ‘Homes for Britain’ campaign, they are playing a nationally important role in solving the housing crisis.

But this isn’t just a housing numbers crisis; it’s also a housing quality crisis. Put simply, far too much of the UK’s stock is in a poor state of repair. Fuel poverty still blights many homes during the winter months. Politicians talk a tough game on energy prices but this only obscures the chronic waste of energy caused by leaky homes. We should all be concerned about waste: siphoning money to unproductive energy companies is hardly sound economics, whilst needlessly contributing to carbon emissions is no kind of environmental policy.

Sustainable homes are more energy efficient, and are also less vulnerable to flooding, create less waste and are healthier and nicer to live in. In short, they are fit for the twenty first century. From 2016 the zero carbon homes policy will mean more of these type of homes being built around the UK, whilst minimum energy efficiency standards in the private rented sector from 2018 are a huge leap forward. These changes will enable substantive improvements – but they are at the margins. The vast majority of the homes that will make up our housing stock in 2050 have already been built. We need to get to work, and we need to get to work now.

Social landlords accredited with SHIFT recognise this and are working to improve the sustainability of their homes, offices and operations with the benefit of a framework developed by the sector, for the sector. They are collaborating, sharing ideas and comparing performance. This report summarises the work they have undertaken over the past two years and shows the impact they are having.

SHIFT landlords all move at different paces but what they have in common is a commitment to measuring their impact and working to improve it. If we are to create the homes and communities that we all want to see, this is an excellent place to start.

Lord Taylor of Goss Moor
Chair - National Housing Federation
Landlords are making good progress using the SHIFT framework, which enables social landlords to measure, compare and improve their environmental performance. This report draws out key issues, by tracking this performance over time.

- More time is being spent assessing flood risks, and action is being taken to reduce them. As a result, over 300,000 extra homes have been confirmed as not at risk of flooding. Flood risk is an area where performance has improved noticeably in the last two years.

- Residents are being engaged on energy efficiency and the type of discussion or education is more active. However there remains a big opportunity for landlords to reduce residents’ bills and energy use by investing more in energy advice and staff training in conjunction with energy efficiency measures. The estimated total extra savings per year that have been made since 2012 from energy saving advice is almost half that for improving the energy efficiency of homes.

- Progress on energy efficiency has stalled in social housing, with the average SAP rating (which measures energy efficiency) remaining the same (at 70) since the last review in 2012. This can be attributed in large part to the changes made to Energy Company Obligation (ECO) which came into effect last year, hitting social landlords disproportionately hard. The Climate Change Act implies a target of SAP 86.

- SHIFT landlords are broadly ‘on track’ to reduce the waste and carbon emissions generated by their offices – illustrating that, unlike for most housing, the value of energy efficiency is recognised by the non-domestic market.

- Increasingly, organisations are realising financial returns from energy efficient homes required by the Homes and Communities Agency. Some are now recording savings from office costs, fleet costs and communal areas of hundreds of thousands of pounds. Others report the halving of rent arrears associated with energy efficient homes.

- Overheating is a ticking time bomb. Nearly 100,000 extra homes are now confirmed secure from the risk of overheating but this leaves many potentially unprotected. 35,000 deaths across Europe and 2,000 in the UK were estimated to have been caused by the heatwave of 2003, and temperatures of 50 degrees have been recorded in some homes.

- Social landlords tend to build to a higher standard than others. But the number of homes built to higher Code for Sustainable Homes standards did not increase over the last two years. This may be due to the Code being wound down.

- There is widespread frustration with how ECO operates and many want to see change. Too often, priorities are skewed, driven by the energy companies and are anathema to a strategic approach.

- Social landlords should seek a new settlement with the Government. They should agree to lead on more cost-effective ‘street-by-street’ energy efficiency schemes across tenures in exchange for restrictions on funding being lifted. They should also seek new flexibilities to enable them to share with residents some of the costs and benefits of investing in energy efficiency.
These radar graphs demonstrate that there has been real progress – but also that there is a long way to go. The inherent challenge in addressing such a large number of homes calls for a co-ordinated effort to kickstart retrofit and social landlords are well-placed to do so.
What is SHIFT?

SHIFT is the sustainability standard for the housing sector, provided by Sustainable Homes and formally recognised by the Homes and Communities Agency. It is an independent assessment and accreditation scheme that demonstrates organisations are delivering against challenging environmental targets.

SHIFT looks at four key parts of an organisation:

**Strategy** – this is essential for gaining buy-in from all stakeholders, setting environmental targets and monitoring progress towards them.

**Existing homes** – these will be standing for a long time and the numbers far exceed the amount of new build in the near future. Making them sustainable will bring people out of fuel poverty and provide healthy places to live that encourage sustainable living.

**New build** – current building regulations are not enough to create a sustainable housing stock. Homes built in the 21st century need to be fit for the 21st century. They need to be highly energy efficient, prevent overheating, enable efficient waste management and have a positive effect on biodiversity.

**Offices** – the environmental impact of offices is often forgotten, but they do have impacts which are assessed by SHIFT. This brings sustainability closer to staff and also leads to the possibility of improving operations and value for money.

SHIFT assessments report recommendations for improvement, helping organisations understand where to focus future investment to achieve savings, and allow comparison with peers. And of course SHIFT helps improve the quality of life of residents and staff through higher quality homes and offices.
This report provides a commentary on the key findings and trends identified from the 2014/15 round of assessments of SHIFT accredited landlords, examining performance on some of the issues addressed by SHIFT. Not all areas are covered in this report.

SHIFT started with 16 accredited organisations. Now over 66 organisations are involved, who between them manage over one million homes. This ranges from landlords with 1,200 homes to those with over 70,000 homes.
A group of forward thinking landlords are working to reduce impacts

Since 2012* they have achieved the following:

- **Saved 84,000 tonnes of CO2 by making homes energy efficient and encouraging residents to save energy...**
  - the equivalent of taking 15,000 cars off the road

- **Saved over 1.65 million cubic metres of water - that's roughly 23.5 million baths...**
  - which also saves 1,741 tonnes of carbon, the same as improving loft insulation to 300m in 2,196 homes

- **Saved over 4,700 tonnes of household waste going to landfill = 393,578 wheelie bins**
  - In their offices they have diverted an extra 928 tonnes of extra waste from landfill = 77,333 wheelie bins

They have also confirmed that...

- **An extra 314,101 homes are at low risk of flooding...**
- **...and an extra 91,682 homes are at low risk of overheating**

Why?

- **56% of the reason for reducing their impacts came from the SHIFT programme**

* Information accurate as of June 2015

Get accredited. Sign up now: www.sustainablehomes.co.uk/shift

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Energy efficiency, fuel poverty and emissions

Improving the energy efficiency of housing stock which is already built is probably the single biggest challenge to creating sustainable homes. Moreover, its status as a proxy for a host of other issues that concern the quality of housing – from health, fuel poverty and affordability to reducing rent arrears – means it is rightly a focus for attention.

Indeed, this overlap is now recognised by the Government, who have re-oriented their strategy for tackling fuel poverty towards its biggest underlying cause – energy inefficient properties – and away from short term, wasteful expenditure that subsidises the cost of large energy bills for vulnerable people.

The new target provides for as many fuel poor homes ‘as is reasonably practicable’ to reach a minimum EPC band ‘C’ by 2030. There are no regulatory drivers in place for social landlords themselves to improve energy efficiency or tackle fuel poverty at present. Despite this, many chose to do so as part of managing and improving homes, with the Decent Homes standard formerly playing a big role.

The SAP (Standard Assessment Procedure) rating is currently the most precise measure of the overall energy efficiency of a home. It is an index based on calculating annual room and water heating costs for a standard heating regime and is expressed on a scale of 1 (highly inefficient) to 100 (highly efficient with 100 representing zero energy cost).

The following graph shows the SAP performance of the 53 SHIFT landlords assessed as part of the 2014 assessment. Each bar represents the average SAP performance of a SHIFT landlord. The graph also shows where we need to be by 2020 and where the sector is on average.

Average SAP rating

We are looking to embark on a significant programme of PV installations, which could cut CO2 emissions by 2,500 tonnes a year”

Colin Salt, Sustainability Manager, Symphony Group

All of our new build is at least Code 4 and many of our developments are built to the highest standard – Passivhaus”

Sue Chalkley, Chief Executive, Hastoe Housing Group

We’ve prioritised raising the energy efficiency of our existing stock as we know the impact that warmer homes have on residents – healthier, cheaper to run and above all, nicer places to live in”

Steve Coffey, Chief Executive, Liverpool Mutual Homes

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<tr>
<th>Average SAP 2012</th>
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<td>70</td>
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www.sustainablehomes.co.uk/shift
In 2014, the average SAP of SHIFT landlords was just over 70 – significantly better than the social housing sector average of 66. This is the same figure as in 2012. This is to some extent due to the increase in the number of SHIFT accredited landlords, some of which had lower performing stock. But in large part reflects changes to the Energy Company Obligation that rendered many projects to improve energy efficiency unviable.

After SAP ratings for homes are improved initially with ‘low hanging fruit’ improvements such as replacing inefficient boilers, measures that are more expensive but have greater impact, such as solid wall insulation, come into play more. Because social landlords, and SHIFT landlords in particular, tend to be further along the trajectory, the changes to ECO which reduced the funding for these measures had a disproportionate impact.

However, even with these barriers SHIFT landlords have been investing and are now saving 57,616 tonnes of carbon a year over and above 2012.

Riverside CEO Carol Matthews chats with a resident from Liverpool who benefited from a £2 million project to insulate homes.

If you’re not embedding sustainability into your asset management strategies you’re missing a trick. Each time you plan an improvement & renewal project – certainly before the scaffolding goes up – landlords should use the opportunity to get more done in a cost-effective way.

It may look like an expense now but social landlords are in it for the long game. If we are going to get to grips with energy efficiency and tackle fuel poverty, sooner or later we’re going to need to do this stuff anyway – so why not plan ahead?”

Robin Lawler, Chief Executive, Northwards Housing
Energy efficiency and SAP ratings are a big part of the story. But providing advice on reducing energy consumption and saving money is also a key part of the battle to secure more sustainable homes. It is an area which shows one of the largest variations of activity between landlords.

Advice can be provided in different forms e.g. during ‘energy doctor’ visits and by gas engineers during gas safety checks. Delivered in the right way, advice can have a significant impact, with fuel bill savings of up to £170 on average per resident reported. We calculate that 26,820 extra tonnes of carbon estimated to have been saved every year since 2012 from engagement is around half that from investing in existing stock – suggesting that this is an area that landlords would do well to attend to if the potential of increased energy efficiency measures is to be realised.

One of the key findings from Sustainable Homes’ National Energy Study carried out with social housing residents was that information on energy use by itself was not enough – advice and feedback is essential. With smart meters soon to be rolled out across the country social landlords are in a position to demonstrate the missed opportunity that would result if some sort of feedback is not also included as part of their specifications.

“We have trained engineers to engage with residents on how they can save during annual gas safety checks. In addition our Financial Inclusion officer gives energy saving advice alongside our Green Doctors.

Activities like this do not need to cost an arm and a leg if they’re done intelligently – and the savings to our residents are worth every penny and more.”

Jon Cross, Property Services Director, Hexagon Your Homes Newcastle are helping residents reduce their energy bills
Landlords are also reducing the emissions from their offices, monitoring energy efficiency with Display Energy Certificates as well as installing a range of measures such as LED lighting and taking steps to encourage staff to use less energy.

The chart below illustrates the annual office carbon emissions reported by SHIFT landlords. The average value for the 2014 public assessment is 90.68 kgCO2/m2/year which is a considerable reduction in the 2012 average of 99 kg CO2/m2/year, and equates to 1,905 extra tonnes of carbon saved a year. Under the trajectory plotted by the Climate Change Act for reducing emissions we estimate this figure needs to reduce to 75 kg per year by 2020 – a target which some SHIFT landlords are exceeding by a good margin.

“All our frontline staff are trained on energy efficiency. If the name of the game is to save energy and reduce bills for residents, then undertaking improvements to properties without doing this sort of thing makes no sense.”

Paul Hackett, Chief Executive, Amicus Horizon
Some of the impact of climate change is now irreversible, meaning a proportion of the UK’s housing stock will need to be adapted to reduce the risk of flooding or overheating.

Over five million people in England and Wales are deemed to be at risk of flooding – but less than 40% of them are aware.

Needless to say, the impact of flooding on people’s lives is significant: when people are flooded, they spend an average of 24 days reorganising their homes. The risks are rising, with the number of homes likely to be flooded expected to increase by 20% by 2035.

SHIFT provides an independent check to see how well landlords understand their flood risks. The best practice of the leading associations is shared, so other landlords can better prepare or take action to reduce the risk of homes being damaged.

Since 2012 over 314,000 extra homes have been confirmed as secure from the risk of flooding. This represents a tangible improvement. Accredited organisations are doing more to check the risks of flooding to their homes and, where they need to, taking steps to reduce that risk. Further, in 2014 more than half of accredited organisations verified that over 80% of their homes were at low risk of flooding. This means that following checks they could confirm that their properties were in a low flood risk area, or that, where properties were in a flood risk area, take corrective action.

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<th>Secure from risk of homes flooding 2012</th>
<th>Secure from risk of homes flooding 2014</th>
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<tr>
<td>33%</td>
<td>60%</td>
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Some SHIFT landlords have had comprehensive flood risk assessments carried out, and many others are assessing their homes and taking corrective action. Often this involves informing residents of the risk and advising that appropriate insurance is taken out. These organisations are some of those organisations scoring 100%, as illustrated in the above graph.

Properties that have been built to the Code for Sustainable Homes standard have automatically been adapted to climate change as a result of the design and build process.

The dangers of cold homes are well-documented – but homes that are excessively hot can also pose a big risk, especially for elderly people.

Temperatures are rising and heatwaves are more commonplace; the summer of 2003 was estimated to have caused as many as 2,000 excess deaths in the UK. Meanwhile, homes built that are overly-exposed, with inadequate ventilation or shading can exacerbate the issue, with temperatures as high as 50°C recorded in some social housing properties.

This increasing threat is recognised by SHIFT, which measures homes that are confirmed as secure from the risk of overheating. Although progress has been made in this area, the average has been skewed by a small number of landlords assessing most of their stock, leaving more than half who have undertaken little or no action at all.

Based on the available data, we have estimated the level of risk to all of our existing stock from flooding and overheating.

This knowledge has then been reflected in our asset management and development strategies, recognising the need for resistant and resilient measures to be considered when maintaining existing stock and building new homes. This will help to minimise the impact of these hazards – and reduce costs in the long term.”

Noel Brosnan, Asset Management Director, Octavia Housing
“Whenever we replace kitchens and bathrooms we specify water efficient products – saving water saves money for residents and helps to future-proof our stock and reduce the demand on mains supplies during droughts which are becoming ever more frequent.”

Louise Archer, Executive Property Director, Broadland Housing Group

Ecology

SHIFT attempts to encourage the setting aside of land or areas that native species can thrive in. This might be wild grass, green roofs or walls, old logs being allowed to rot or bat or bird boxes. This is important. England’s biodiversity plan, Biodiversity 2020, is a Government strategy aiming for healthy, well-functioning ecosystems with more and better places for nature for the benefit of wildlife and people.

The 2014 UK Biodiversity Indicators provide a summary of how progress is fairly for some species. Between 1970 and 2013, populations of breeding farmland and woodland birds decreased by 55% and 28% respectively. Since 1976, the indices for butterflies in semi-natural habitats and for those found in the wider countryside have decreased by 73% and 36% respectively. All of these changes are statistically significant. The percentage rise in homes with ecological enhancements is significant, not least because of the increase in the number of homes managed under the SHIFT programme. The net impact is that between 2012 and 2014 the gardens of an extra 67,697 homes benefitted from some type of ecological enhancements.

However, some organisations are doing a great deal more than others:

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<th>Homes with ecological enhancements 2012</th>
<th>Homes with ecological enhancements 2014</th>
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<tr>
<td>8%</td>
<td>13%</td>
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[1] UK Biodiversity Indicators, by the Biodiversity and Ecosystems Evidence and Analysis team (Defra) 2014.
Waste

Landfill sites are filling up, and the latest version of the EU Waste Framework Directive requires member states to achieve a 50% household recycling rate by 2020[1]. England achieved 44.2% - whilst Wales has achieved 53%[2]. The financial impact of England not meeting this target could be significant – with some suggesting this could result in fines in excess of £500,000 a day. This regulatory driver has meant that taking steps to reduce the amount of waste going to landfill is increasginly an imperative.

But it is also an issue for individual households, and SHIFT landlords have been active in encouraging their residents to reduce the amount of landfill they produce. Homes built to sustainability standards such as Code for Sustainable Homes include dedicated internal waste recycling bins to help drive a change in habits.

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<tr>
<th>Diversion of office waste from landfill 2012</th>
<th>Diversion of office waste from landfill 2014</th>
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<tr>
<td>53%</td>
<td>65%</td>
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Landlords have also made significant progress in diverting waste from landfill in their offices, with 65% of waste now diverted. This represents an improvement of 12% since 2012. Landlords have set up recycling schemes, used contractors with good environmental credentials and switched to centralised photocopiers and printers to discourage the generation of waste in the first place. This is a key area for improvement – whilst recycling rates are relatively high, the amount of waste produced is still high, and attacking this at source would represent an obvious win-win for resources and costs.

Making sure that the people we work with share our commitment to sustainability makes sense and can contribute to embedding the approach more widely. We have implemented 100% recycling targets for our maintenance contractors.”

Phil Thompson, Head of Development & Sustainability, Catalyst Housing Group

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Time to reform the Energy Company Obligation?

SHIFT accredited landlords are leading the sector by investing in homes, even without significant funding on the table. But the changes to the Energy Companies Obligation of 2014 have had a disproportionately large impact on social landlords, who are often further along the curve in terms of the types of measures they have undertaken. The changes turned off the tap on many solid wall insulation schemes – amongst the most costly to carry out, but also one of the measures that have the biggest impact on energy use and bills – rendering them unviable.

We asked SHIFT landlords for their views on the operation of ECO. It is clear that, even putting the changes to ECO to one side, many have found its operation frustrating and distortive. A large amount of resource needed to be spent on getting to grips with how it worked, and ‘matching up’ energy companies with projects was also time-consuming. This appears to have had two consequences.

Firstly, rather being topped up to get them over the line, projects have often been fully funded by the obligation without help from landlords or third party funders – great if you are the lucky recipient, but not a very equitable or efficient
use of money. Secondly, to ensure that schemes came to fruition and were not rendered unviable in an uncertain funding environment, projects are frequently planned without factoring in external funding. This means that external investment designed to drive decision-making towards energy efficiency can be, in effect, ‘wasted’. In short, for many landlords, ECO has been bureaucratic, cumbersome and a poor use of resources.

So there is appetite for change. The current obligation ends in 2017, and energy companies are gearing up to discharge the majority of their commitments by the end of 2016. We need to be thinking seriously now about what should come after. There is broad consensus that its successor should:

- Be taken out of the hands of the energy companies – social landlords, local authorities and community groups are best-placed to determine where investment is most needed;
- Target low-income groups at risk of fuel poverty – who already contribute a disproportionate amount through green levies;
- Adopt an ‘area-based’ approach – so that economies of scale can be maximised and resources used more efficiently.

**Five recommendations to get more done**

1. Residents and landlords should share both the costs and the benefits of more energy efficient homes. The significantly lower bills that flow from building and retrofitting to high standards should be reflected in a higher ‘living rent’ that allows landlords to recoup some of the costs.

2. A standard on overheating should be developed to reduce the risk to tenants. At-risk groups are vulnerable to a changing climate and retrofit works can exacerbate the problem if not done right.

3. Landlords should reach out beyond their front door and use their experience and expertise to help deliver cost effective, area-based energy efficiency projects across tenures, starting in low income areas. As part of this, restrictions on energy efficiency funding that benefits social housing residents should be lifted.

4. Make new zero carbon homes work for existing ones. ‘Allowable solutions’ will enable developers to offset the last few yards by paying a carbon tax. Proceeds from this should be ring-fenced to retrofit existing homes.

5. Landlords should use standards such as the Home Quality Mark as a framework to build high quality, sustainable homes. The Home Quality Mark has a particular focus on skills and performance checks during and after the build process, which can only help reduce the ‘performance gap’. It also helps ensure wider sustainability including use of sustainable materials and ecology.

We hope you found this report useful. SHIFT landlords continue to work hard to reduce fuel bills and reduce their environmental impacts. Here you have seen a fraction of their work. We welcome feedback on the report and details of those that would like to collaborate to help us all.

**Measure, Compare, Improve**

www.sustainablehomes.co.uk/shift
Acknowledgements
SHIFT would like to acknowledge the support of our partners

This report is kindly sponsored by

SHIFT partners

We would also like to acknowledge the support of SHIFT landlords

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Bromford Group
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Cobalt Housing (Symphony)
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Midland Heart
Mosscare Housing
New Charter Housing Trust
Northwards Housing
North Wales Housing
Nottingham City Homes
Nottingham Community HA
Octavia
Peak Valley HA (Symphony)
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Swan Housing Association
Thrive Homes
Trafford Housing Trust
Trident
Wigan & Leigh Housing
Yarlington Housing Group
Yorkshire Housing
Your Homes Newcastle

www.sustainablehomes.co.uk/shift
Why join?

Organisations sign up to do SHIFT for a variety of reasons. Achieving SHIFT accreditation allows you to demonstrate your environmental credentials to funders, partners and regulators, and differentiate yourself from your peers. It can help reduce fuel poverty and improve the financial resilience of organisations and customers.

Organisations that achieve SHIFT accreditation become part of an exclusive network that gets a range of additional benefits from Sustainable Homes, including exclusive events, input to lobbying campaigns, offers from SHIFT partners, discounts for training courses and tailored support and advice.

And of course, SHIFT helps you improve the quality of life of your residents and staff through higher quality homes and offices.

100% said they would recommend SHIFT to others

90% said SHIFT improved their reputation

If you have any feedback on this report please do not hesitate to get in contact:
020 8973 0429 info@sustainablehomes.co.uk

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