Department for
Energy Security
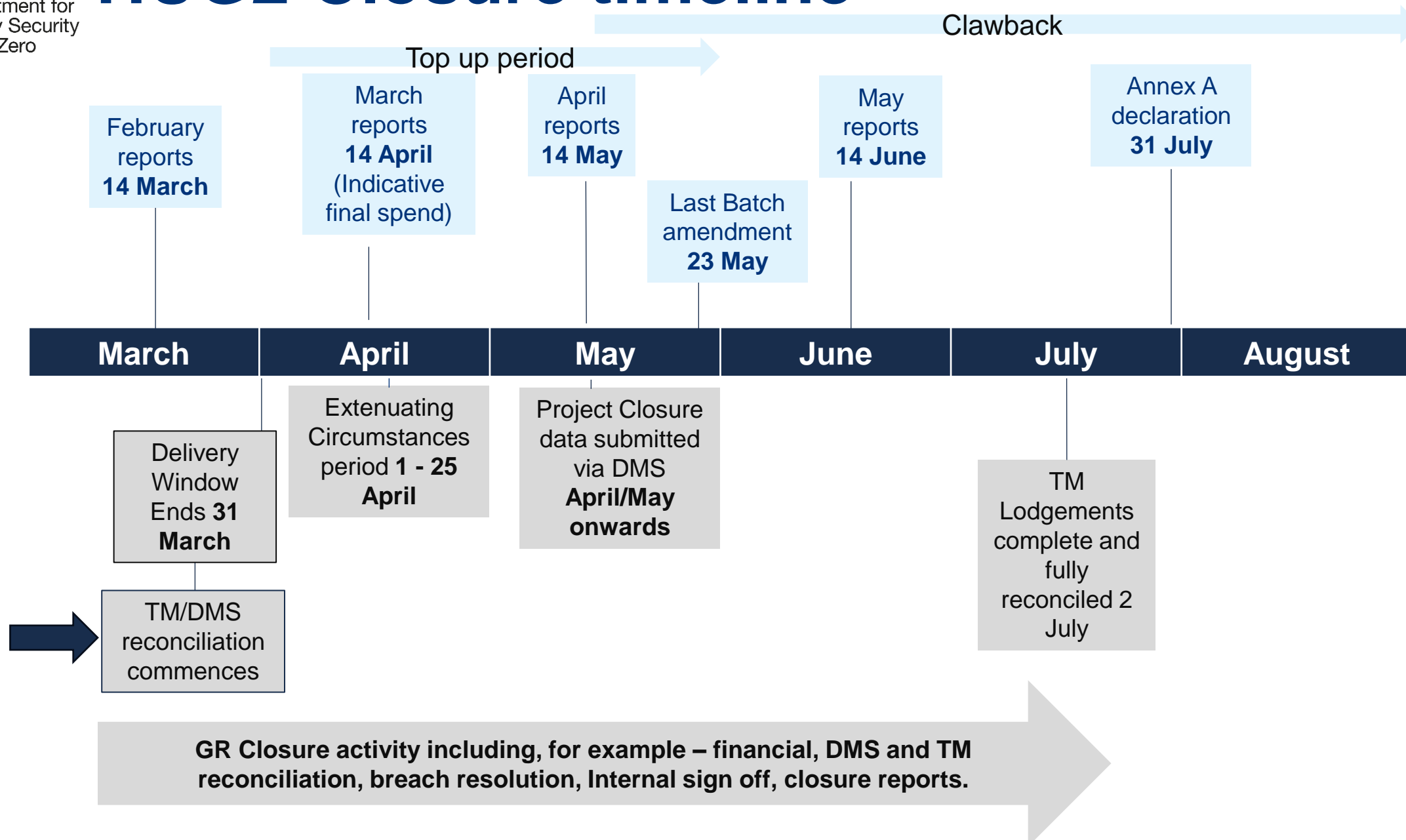& Net Zero

HUG 2 May Roundtable

- Actions from previous roundtable – **Beatrice Irullo**

- HUG2 closure timeline, processes and closure checklist – **Kevin Smallwood**

- Finance: payments and clawback – **Ross Ewing**

- DMS Reporting Reminder – **Sarah Cassidy/Gareth James**

- Data Reconciliation – **Graeme Preston**

- Transition to WH: LG – **Beatrice Irullo**

- Lessons Learned – **Lisa Bach**

Previous roundtable recap

The last roundtable in March covered several key areas including GR queries, HUG2 closure timeline and processes, data reconciliation (DMS walkthrough and Energy Efficiency Checker), finance payments and clawback, fraud and audit, and transition to WHLG.

Action	Update
GRs to sign and return data sharing agreements to access TrustMark data, if they haven't submitted this already.	Ongoing. Any questions should be sent to installchecker@energysecurity.gov.uk
DESNZ to reshare DSAs for Energy Efficiency Checker for re-sign and return.	Complete. If any LAs still do not have the DSA, please contact installchecker@energysecurity.gov.uk
DESNZ to engage with specific GRs with new personnel to go through closure process and outstanding actions.	Meeting to be set up.
Salix/DP to follow up with specific GRs regarding their financial closure letter and mobilisation payments.	Complete
DESNZ to resolve any issues with specific GRs regarding missing payments.	Complete

HUG2 Closure timeline

Clawback

Top up period

February reports **14 March**

March reports **14 April** (Indicative final spend)

April reports **14 May**

Last Batch amendment **23 May**

May reports **14 June**

Annex A declaration **31 July**

March	April	May	June	July	August

Delivery Window Ends **31 March**

Extenuating Circumstances period **1 - 25 April**

Project Closure data submitted via DMS **April/May onwards**

TM Lodgements complete and fully reconciled 2 July

TM/DMS reconciliation commences

GR Closure activity including, for example – financial, DMS and TM reconciliation, breach resolution, Internal sign off, closure reports.

3

Finance: Payments and clawback

Department for Energy Security & Net Zero

Top up payments
- DESNZ wrote to all GRs 19th March confirming the current understanding of financial position and the value of the March payment.
- The first round of top up payments were made in April for those GRs whose February data returns indicated a requirement for further funding.
- The March data return has been used to calculate whether any additional payments are necessary in May. These payments will be confirmed and issued next week (w/c 19/05).

Final payment
- If necessary, a final payment will be made at scheme end once final data has been submitted and cleared.
- The March, April and May data returns will inform that potential payment, along with information gathered as part of the data reconciliation process.

Clawback
- Return of funding by Grant Recipients to the Department will take place after final spend reports and financial reconciliation is complete - from May at the earliest.
- DESNZ will work with the GRs to identify unspent funding and any policy breaches which may be subject to clawback.
- Clawback decisions will be informed by the data provided by GRs in the monthly uploads and the data reconciliation outcomes.

Monthly Reporting

Please be aware that the HUG 2 Data Collection Template on gov.uk was updated on 30/04. Please use this template going forward.

You cannot submit your 'final report' until all lodgements and reconciliation activities have been completed.

This should be agreed with your SPOC who will then activate the final report function on the web portal which will allow you to submit your final report online. This can only be activated once BAU monthly reporting has ended and only one version of the final report can be submitted.

Reminder – How to submit your final HUG2 report

Your final report is due when you have completed all lodgements and reconciliation work. Please continue to submit monthly reports until that time, as and when the data becomes available.

Step 1: Notify your SPOC once you have completed all lodgements for all properties/measures. DESNZ will then activate the final report setting on the web portal providing all reconciliation work has been completed and quality assured.

Step 2: Log into the web portal and select the 'Final report' update link for the data return period.

Data Return Period	Date Due	Status	Action	Admin
Final Report	31/10/2025	AWAITING	Update	
October 2024	14/11/2024	CLOSED		Re-open
► September 2024	14/10/2024	CLOSED		Re-open

Step 3: Upload your final report and click 'Submit' using the usual monthly reporting template.

Data Reconciliation

1. Aim of Reconciliation is to verify that the information in DMS is accurate and matching the same data held in Trustmark.
2. This is to ensure the Department can be confident in their internal dataset, verify that measures have followed the correct process for lodgement, and use it to confirm / verify the final position of all Grant Recipients.
3. The Process outlined in this is a two-stage process of verifying DMS information against Trustmark and then assessing what that DMS data shows as the final position of Grant Recipients.
4. As part of this, we will be confirming that spend is compliant with policy, such as being within cost caps, as a second layer of checks after the Batch Process.

The data reconciliation example slides have been removed from this presentation, as all GRs have now received tailored guidance on their individual reconciliation issues. For further clarification or support, GRs are encouraged to contact their Salix project support officer.

Transition

The Extenuating Circumstances period for HUG 2 ended on Friday 25 April. If you requested an extension to the Extenuating Circumstances deadline, please refer to the instructions provided by Salix Finance regarding completion of work, recovering eligible abortive costs under A&A or logging work under WH:LG. If you are considering transferring a home from HUG2 to WH:LG, you can do so by:

- firstly, checking the household fits the WH:LG eligibility criteria and represents value for money under the scheme;

- secondly, if still eligible, submitting the household as part of the WH:LG Automated Batch System (ABS).

A closure checklist for HUG 2 can be found via the HUG Hive.

PAS Transition

Retrofit assessments which have been converted from PAS 2035:2019 (the previous version of the standard) to PAS 2035:2023 (the current version of the standard) can be used for Warm Homes: Local Grant providing the TrustMark guidance is followed.

Lessons Learnt

Why it's important:
Sharing your lessons learned helps us improve future projects, avoid repeating mistakes, and create a culture of continuous improvement.

What you need to do:
Think about what went well, what didn't go as planned, and how we can improve next time.

Key points to include:
- **What worked well:** Share what went well and any successes that you would repeat in the future.
- **Challenges:** Mention any problems or difficulties that made the project harder.
- **Improvements:** Suggest changes or actions that could help improve future projects.
- **Helpful tips:** If you found a more effective way of doing something, share it so others can benefit.

How to do it:

1. Go to the Lessons Learnt page on the Hive

2. Use the provided template and guidance.

When to complete it:
Submit your lessons learned logs as part of project closure via your SPOC no later than **Thursday, 31 July 2025** as outlined on the closure checklist.

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Questions?