Building Performance UK Campaign Strategy

1. Introduction

The Building Performance Network (BPN) is a not-for-profit activity, currently run as a programme of the Sustainable Development Foundation, but aiming to be an independent, stand-alone organisation. It works to bring together individuals and organisations with an interest in improving building performance in operation, based on integrity and robust data. It operates in all building sectors and BPN membership is open to all.

The BPN has the following key objectives:

1. **Bring people together** with an interest in building performance
2. Understand how building performance data is collected and analysed to ensure members have **reliable data** on which to base their decisions
3. Move forward the practice of building performance evaluation (BPE) to further **increase its value** for the sector
4. Share and make members aware of a wide range of studies undertaken in the UK and **create a platform** for sharing data for additional uses
5. Use performance data to **influence change in policy, procurement and practice** and to move the building performance agenda forward

Currently, the main focus of the BPN is on increasing demand for BPE; this strategy outlines the campaigning rationale and activities needed to achieve that aim.

2. Background

PEST analysis (external factors) in relation to BPN objectives

A PEST analysis is used here to understand the various external factors in the UK related to BPE in order to then gather relevant data, develop a SWOT and Action Plan.

Political Factors
- Current national government policy is not favourable towards regulation – trying to de-regulate and use voluntary measures where possible
- Grenfell Tower disaster has increased government concern about building performance – Building Safety Bill
- Devolved governments are more open to BPE – e.g. Wales pushing ahead with housing BPE
- Green Deal does not include BPE
- New build still prioritised over retrofit strategies
- BPE skills still not mandatory for Professional Institution membership
- BPE is not part of built environment education – though this may change with Architects Registration Board (ARB) soon

Economic Factors
- Very difficult time to promote additional cost of BPE due to Covid-19 impacts on industry
- BPE still perceived as 'costly' – economic value case not well established
- Funding opportunities for BPE via BEIS, but must demonstrate 'innovation'

- Insurers are still wary of BPE – need to show how it 'de-risks' design and construction and lobby, PI + insurance companies
- Contractors and Developers view BPE as increased risk with no increase in margin.
- Building Societies and Financial institutions are important for leverage e.g Ecology BS, Nationwide BS
- Need to develop understanding of economic benefits through standardisation of BPE (British Standard) and quality improvement through feedback

Social Factors
- Indoor Air Quality (IAQ) performance is gaining significant attention due to Covid 19 airborne transmission and issues related to comfort, ventilation, heath and fuel poverty.
- Social Value is gaining traction as a 'soft' performance measurement tool (see Flora Samuel's work)
- Performance disclosure is beginning to be included in Awards for Buildings (e.g. RIBA announcement for 2021 Stirling prize)

Technological Factors
- Rapidly developing BPE digital/wireless technology (e.g. Luke Smith)
- New British Standard being developed for BPE – due out October 2021
- Most voluntary building standards (LEEDS, WELL, BREEAM, Passivhaus etc) require little or no post-occupancy BPE
- Embodied carbon has moved up the agenda
- How to get the BS into building specifications
- What about the potential RIBA and CIBSE for POE requirements?

SWOT analysis (internal and external factors based on PEST)

SWOT of BPN BPE Promotion	
Strengths	**Weaknesses**
1. Unique organisation solely for BPE 2. Part of SDF family of NGOs 3. Personal contact network of BPN team 4. Strong research team behind BPN 5. Nimble organisation – able to respond rapidly to changing events	1. Lack of funding to promote BPN activities 2. Small and imbalanced membership base – mainly academic and consultants – few client organisations, no contractors or developers 3. BPE is based on revenue rather than capital savings – not prioritised by clients 4. BPE business case poorly made 5. Lack of visible BPE evaluators
Opportunities	**Threats**
1. Bring different NGO interests in BPE together under one BPN platform 2. Focus on IAQ to draw in other BPE performance factors e.g. health, comfort, ventilation, acoustics, fuel poverty 3. Focus on added 'de-risk' value of BPE for insurers 4. Focus on Lifecycle Cost Analysis savings to make case for BPE 5. Focus on added 'soft' social value of BPE – health and wellbeing benefits 6. CoP26 in Glasgow - use it 7. Develop and promote BPN product/service package 8. Signpost other BPE methods/tools/guidance (peer review and endorse first)	1. Other NGOs are also interested now in BPE and promoting it in their own way (e.g. Wood Knowledge Wales) – confusing landscape 2. BPE could get reduced to just energy and CO_2 monitoring via various policy developments 3. BPN could be seen as outdated if it does not incorporate full BPE cycle – not just occupancy 4. Increasing importance of embodied carbon v occupancy carbon emissions. Where do the credits for European timber use in the UK sit? In the country of origin? 5. Professional indemnity required for designers is still an impediment to BPE work. 6. Loss of members/funding to BPN

9. Develop and promote case studies/survey based on economic benefits of BPE. 10. Delivery of the Government's 10 point Industrial strategy and employment of 250,000 new jobs 11. Delivery of the UL's zero carbon target 12. New British Standard for BPE (Oct 2021). 13. Promote BPE Evaluators as new discipline	

3. Key Actions to take

There is a logical sequence to the activities proposed for the BPN Campaign Strategy, as result of the SWOT analysis, which requires data and information to be developed first prior to the engagement stage.

Stage A. Create strategy mapping, database and activity log
- Develop strategy document
- Develop strategy mapping to show hierarchy and relationships of organisations related to BPE
- Use strategic mapping to identify clear hierarchy of organisations and order of contacting for plan to maximise impact
- Develop Excel GANTT Spreadsheets to show:
  - campaign timetable against deliverables
  - contacts (+ details for contact)
  - timeline for 6 months -stretch to 12 to show:
  - action points (related to numbered BPN objectives)
  - follow up actions

Stage B. Develop BPE Briefing Note
- Collect key data on calculated real economic savings evidencing the 'business case' due to housing BPE fine tuning/defects spotted in 10 case studies (new build and retrofit):
  - LILAC – projected savings from condensation water leaking onto straw (with Craig White?)
  - White Bear Estate, Doncaster – savings on fuel bills due to faulty settings on cylinder
  - Others from BPN database (check with Rajat Gupta)
- Create 4 page BPN equivalent of Parliament POST note about BPE – not as intense, but evidence-based with references – it would include data and the 'business case' and compliment the introductory slide pack that Ross is developing for membership.
- Create different versions of BPE Briefing Note for different audiences, if time allows.

Stage C. Signpost existing BPE methods and tools
- Establish what BPE policy and guidance is already developed and suggest to signpost via BPN website – Knowledge Hub.
- Revive BPN Portal bid for existing BPE data - add methods to the bid, and take over this role from the Usable Buildings Trust. Discuss with Arup, Bill and Adrian.
- This will help develop greater credibility as an authoritative NGO, prior to engagement activities. Campaign Director to liaise with Projects and Communications Associate. Link this with the BPE British Standard process.

Stage D. Client Engagement
- Develop Contact database and Engagement Planner
- Design templates for short invitation emails for different sectors (government, financial institutions, social housing, private housing, retrofit, professional institutions, research, other NGOs engaged with BPE, Education and Training) and establish:
  - Do they have any policy on BPE?
  - Do they carry out BPE?

- What methods do they use?
- Any examples of best practice?
- Key barriers to BPE?
- What BPN can offer: Briefing Note, BPE guidance, peer to peer support, CPD, showcase case studies,etc.

- Develop Follow-up Zoom meeting protocol:
  - Relationship of BPE to organisational activities
  - Introduce BPE Housing Primer stages
  - Discuss BPE CPD and collaborative events

Stage E. Collaboration with others promoting BPE
- Offer to peer review their guidance and if appropriate, endorse.
- Suggest a common cause to promote BPE via evidenced-based case studies showing business case
- Suggest incorporating BPE more into their activities and policy
- Develop programme of co-hosted BPE events between BPN and other organisations

Stage F. Advocacy and lobbying
- Develop British Standard for BPE (I am on group developing this – confidentially).
- Lobby government and other policy making organisations to make BPE and targets mandatory in their requirements, demonstrating existing BPE evidence and collaborations.

4. Key sectors and organisations to target (prioritised)

The BPN Campaign Strategy Map (see separate document) illustrates the dynamics between the various key sectors involved with BPE, showing who influences who and how. From this, it is clear that Government and Industry are the priority target areas both for lobbying and membership. They are followed by Professional Institutions and Research Organisations. While NGOs are useful for information, it is unlikely that many of them will join the BPN as members, but it may be possible to form a useful NGO Forum or Network, without payment, for lobbying and dissemination. Finally, Education and Training is largely allied to Industry, Professional Institutes and HEIs, so it is more of an outcome than a target lobbying/recruitment area.

In order to target and prioritise sectors and actions, the following table sets out potential BPN impact, barriers, interventions and likely uptake. This is based on the experience of the BPN Campaigns Director, rather than any rigorous analytical study at this stage, and is subject to change, depending on developments and information coming to light during the BPN campaigns.

BPN Potential Impact in Sectors				
Sectors	Impact/Enablers	Barriers	BPN Intervention	Likely Uptake
1. Government				
Parliament	low - policy	APPGs, MPs are talking shops	Not a priority	Highly unlikely
BEIS	v.high –policy/ funding	Stiff competition from other orgs.	Adopt BSi BPE standard, Bid for data platform	Possible
MHCLG	v.high – policy/legislation	Averse to increased regulation	Lobbying for regulatory change	Possible with BSi standard
Dept for Education	v.high – policy/legislation	Already have BPE in place	Amend BPE guidance	Highly unlikely

		but poor guidance		
GLA	medium – policy/delivery	Some policy already in place – cannot change it	Provide BPE guidance/possible membership? Funding already in place to develop BPE.	Very likely
Local Govt planners/ LABC	medium – local planning policy/housing management	Uniting LAs, competitors	Provide BPE research/guidance/data/legacy	Likely
Climate Change Committee	high - policy	Other priorities – need move beyond monitoring	Lobby/guidance via Baroness Brown, focus on occupant influence as well as physical carbon emissions	Likely
2. Industry				
Indemnity insurers	v. high – company policy	Risk averse	Policy development/lobbying with RIBA/ LETI/ Wren	Likely
Property insurers generally	v. high - policy	Risk averse	Policy development/lobbying	Possible
NHBC	v. high – national policy	May feel it's not their responsibility	Policy development/lobbying in line with ZCH 2014 work	Likely
Zurich/ L&G	high	Risk averse	Policy development/lobbying	Possible
Property Funders generally	v. high – policy/ delivery	Risk averse	Policy development/lobbying/funding bid	Possible
Nationwide Blg Soc	v. high – policy/delivery/funding	Risk averse – other priorities	Policy, work with Nationwide trust, link to fuel poverty	Possible
Ecology Blg Soc	medium – policy/delivery/funding	Other priorities	Policy, link to sustainability	Possible
3. Clients	v.high – policy/funding/delivery	Risk averse, funding	Provide BPE research/guidance/data/legacy	Possible
Housing developers	medium – policy/funding/delivery	Risk averse, funding, bespoke housing orgs for BPE eg GHA	Provide BPE research/guidance/data/ legacy – how to distinguish BPN from GHA?	Possible
Home Builders Federation	v.high – national policy	Risk averse	Provide BPE policy/lobby	Possible
National Housing Federation	v.high – national policy	Other priorities, bespoke HA orgs for BPE	Provide BPE policy – link to health, fuel poverty, maintenance/lobby	V.Likely
Schools	high - delivery	Risk averse, funding	Provide BPE for PPE, focus on IAQ, research/guidance/data/ legacy/membership?	Possible
4. Professional Institutions				
RIBA	v.high – international policy/guidance	Lack of Prof. Indemnity Insurance	Lobby for policy, data/legacy	Likely
CIBSE	v.high – national policy/guidance	Lack of Prof. Indemnity Insurance	Lobby for policy, data/legacy	Likely
ARB	high - policy			
5. Higher Education Institutions/ Research	medium – funding, delivery	Think they can do it on their own – don't need BPN	Partnership with industry/research/data legacy/membership?	Likely

6. NGOs supporting BPE	medium – policy/guidance	Competitors for same space?	Collaboration to promote/lobby	Likely
7. Education and Training orgs	medium – policy/guidance	Funding – think they are already doing it in-house – don't need BPN	Collaboration to disseminate BPE/lobby	Possible

Based on the analysis in the table above, the following organisations are suggested as targeted priorities, with additional areas that could be involved in BPE in one form or another shown also.

1. Government
  a) *BEIS*
  b) *MHCLG*
  c) *Climate Change Committee (Chair: Baroness Brown)*
  d) *GLA/ London Dockland Development Corporation*
  e) *Scottish Executive*
  f) *Welsh Housing Authority (most advanced on BPE?)*
  g) *Irish Housing Authority*
  h) *Scottish Housing Regulator (Landlord performance)*
  i) *Scottish Housing and Social Justice Directorate*
  j) *Northern Ireland Housing Executive.*
  k) *Local Governments and Councils*

2. Industry
  a) *Insurance national institutions*
  b) *Financial national institutions*
  c) *Professional Indemnity Insurers: Wren Insurance (RIBA)*
  d) *Property Insurers: Zurich, Legal and General*
  e) *Warranty providers: National Housing Building Council, Zurich*
  f) *Property funders.*
     -Ecology BS
     -Nationwide BS

3. Clients
  a) *housing developers:*
     *- **Social Housing** –Housing Forum, National Housing Federation, Scottish Housing Federation, Welsh Housing Federation, Northern Irish Housing Federation, Local Housing Authorities, Large Housing Associations, Suss Homes*
     *-**Private Housing** – Home Builders Federation, GHA,18 members of the GHA Vanguard Research project. Glasgow? Edinburgh?*
     *-**Housing Retrofit** – housing associations, maintenance forums*
  b) *non-domestic developers (Schools, Health etc)*
     *-**Schools –** possible big win with PPE – lack of knowledge – IAQ – what can we effect?*
     *-**Health***

4. Professional Institutions
  a) *RIBA*
  b) *CIBSE*
  c) *RICS*
  d) *RIAS*
  e) *ARB*
  f) *CIH (Chartered Institute of Housing)*
  g) *IWFM (Institute of Workplace and Facilities Management)*

h) *CIOB (Chartered Institute of Building)*
i) *CIAT (Chartered Institute of Architectural Technologists)*

5. Research
Higher Education Institutions
a) *Strathclyde University: HabLab*
b) *Loughborough*
c) *Nottingham University*
d) *UWE*
e) *Sheffield*
f) *Leeds Beckett – members*
g) *UCL*
h) *Portsmouth - members*
i) *Oxford Brookes – members*
j) *Salford – members*
k) *British Standards Institute*
l) *BRE*
m) *BSRIA*
n) *Swansea University – Active Building Centre*

6. NGOs promoting BPE
a) *UK Green Building Council*
b) *Usable Buildings Trust*
c) *BUS (via Arup)*
d) *Soft Landings (via Arup) and Government*
e) *Passivhaus Trust*
f) *Retrofit Academy*
g) *Superhomes*
h) *Carbon Co-op*
i) *Woodknowledge Wales*
j) *Better Buildings Partnership*
k) *Green Construction Board (Lynn Sullivan)*
l) *LETI*
m) *ACAN*
n) *The Edge*

7. Education and Training for BPE
HEIs – same as for Research

5. Phasing of BPN campaign strategy

The BPN Campaign will initially last 6 months, with a view to extending to 12 months if funding is available. The phasing needs to be short, sharp and decisive.

A 'BPN Campaign Project Planner' GANNT chart shows the proposed timing of the action areas.
A more detailed 'BPN Engagement Plan' outlines exactly who will be contacted and how. The contact sequence is based on the priority groups identified through the 'BPN Campaign Strategy Map' which shows the impact relationships and dynamics between the various sectors.

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