Alpha Day summary

14 March 2019 | 9am – 12:30pm | 12 participants

PARTICIPANTS

- Scheme representatives x1
- Software providers x2
- BEIS representatives x2
- Academic researchers x2
- Assessors x1
- Landlord/property owner x1
- MHCLG data analysts x3

AGENDA

- Brief of team and project
- Task 1: Prioritising needs
    - Review the list of user needs across all personas
    - Select and prioritise a list of top 10 needs across all personas.
- Task 2: Information needs
    - Write the main goal for your persona at the top of the sheet
    - Using post-its, identify the pieces of information would be needed to achieve this goal
    - Highlight the key pieces of information that must be in place to achieve the goal
- Further feedback
    - Opportunity to raise any further points outside the focus of the tasks

Key service needs

The following items were highlighted as 'must haves' for the EPB service:

1. **Increased access to EPB register data**
    - Access to historic submission data about a property

- ○ Access to raw input data for all certificate types so that the data can be used by the end user (i.e, government departments, owners, policy makers) to:
    - *Conduct more detailed research*
    - *Improve the accuracy of energy performance ratings across all certification types*
    - *Improve audit capabilities and accuracy*
    - *Conduct further modelling of the property so that energy improvements can be planned and it is possible to see the impact of the changes on the rating*
  - ○ Real-time view of the data
  - ○ Different levels of access for different user groups
  - ○ Free access to the data (financial)

2. **Ensure that data remains devoid of personal information until specific consent has been received for it to be used for additional purposes**

3. **Improved quality of the data on the EPB register**
   - ○ Business name should be removed from the address
   - ○ Standardise addresses so that UPRN can be used to link records to other data sets
   - ○ Open data release should not have any erroneous data and there should be an agreement up-front of what filtering should be applied to this data set before it is published
   - ○ Accurately flag duplicates so that it is easy to distinguish errors/cancellations from deliberate and valid duplicates
   - ○ Implement a better data hierarchy around properties with subdivisions so that these properties are easier to locate, assess and audit
   - ○ Remove the double view of EPC certificates - a different version of the EPC is returned if the address is used to search versus the certificate reference number (i.e. the reference number search will return an EPC with details of the Green deal disclosure while the address search won't)

4. **Improve user experience of the current website**

5. **Have a single, central calculation engine that software companies and schemes can use to when calculating energy ratings**

6. **Provide API access to the register**
   - ○ A better connection between the assessment software and the register
   - ○ Allow estate agents and property portals to link directly to original EPC to reduce errors

7. **Provide standard summary reports of different geographies down to different levels (as low as possible)**

8. **Visualisation of the statistics data on the shown on the EPB site better (i.e. D3)**

9. **Remove 'Opt out' criteria from website**

- Upcoming legal requirements for data will most likely make this option redundant

Key information needs

Brief overview of the information needs highlighted by each user group and the reasons behind them.

Software provider | Scheme | Assessor:

- **XML data of individual assessments without personal data**
- Unique assessor ID: increases ability to conduct accurate audits
- **View of other EPCs submitted by one assessor across all schemes:** increases ability to conduct accurate audits
- **View of other EPCs submitted for the same property across all schemes:** increases ability to conduct accurate audits
- **View of Exemptions information within the same register as EPC information:** reduces likelihood of assessments being done on properties that are exempt and connects information in a more meaningful way.

Government Departments:

- **Address level property information:** ensure that data can be effectively analysed and linked
- **Ability to link directly to an EPC:** reduces errors or fraud if an owner can provide a link to the certificate from the source i.e linking to the exemption register or to a property site (Zoopla, Rightmove etc)
- **Standardised EPC reports by Local Authority area:** set report on specific variables to be used for enforcement purposes
- **Relational data that can be linked to other data sets:** enable additional analysis and identification of trends in an area
- **Anonymised data for their region:** in keeping with legal requirements for their region, the data needs to be anonymised (Devolved administration)
- **Historical data of property:** conduct audit and quality checks on a property as well as identify trends
- **Statistical summary of data:** overall summary of certain variables within the data

Data Consumers:

- Access to input data for assessments
- Summary of ratings and other variables within the EPB data set
- Detail on why certificates were created
- Standardised address level data
- Up-to-date information via open data community

Other feedback

- Trust in EPCs is at risk due to high variability in assessment results and inaccuracies in the data
- An EPC advisor tool for consumers that allows them to get an understanding of the impact of changes to the property, calculate basic quotes for improvements and potentially check local installers
- Timely access to data is important and currently this isn't the experience for Devolved administration users
- There needs to be an improved process for assessors to cancel certificates - currently they have to go through the schemes and this can be time-consuming
- There is currently little interaction between different end user groups - sessions like the alpha day provide these groups with a safe space to discuss specific queries about EPCs and get answers directly from industry experts
- Providing the ability to flag more detailed reasons for lodging assessment data ensures that data analysis is done on relevant data sets.