

Household Energy Upgrades Fund (social housing) – Australian Capital Territory

FEDERATION FUNDING AGREEMENT – ENVIRONMENT

Table 1: Formalities and operation of schedule

Parties	Commonwealth Australian Capital Territory (ACT)																														
Duration	This Schedule is expected to expire on 30 June 2027 or on completion of the end of term evaluation, including data, evaluation and reporting contributions from the ACT.																														
Purpose	<p>This Schedule will support the delivery of a range of high value energy performance upgrades to existing households in both public and community social housing under the Household Energy Upgrades Fund (social housing) initiative (the Initiative). These upgrades will contribute to the reduction of energy bills, energy consumption, and/or increased thermal comfort for social housing tenants and properties.</p> <p>In entering into this Agreement, the Commonwealth and the ACT will partner to provide additional benefits for social housing tenants, above and beyond existing ACT programs.</p>																														
Estimated financial contributions	<p>The Commonwealth will provide total financial contribution of up to \$7.176 million to ACT with a matched co-contribution in respect of this Schedule.</p> <table><tr><td colspan="6">Table 1</td></tr><tr><td>(\$ million)</td><td>2023-24</td><td>2024-25</td><td>2025-26</td><td>2026-27</td><td>Total</td></tr><tr><td>Estimated total budget</td><td>1.828</td><td>3.082</td><td>6.902</td><td>2.540</td><td>14.352</td></tr><tr><td>Less estimated National Partnership Payments</td><td>0.914</td><td>1.541</td><td>2.181</td><td>2.540</td><td>7.176</td></tr><tr><td>Balance of non-Commonwealth contributions</td><td>0.914</td><td>1.541</td><td>4.721</td><td>-</td><td>7.176</td></tr></table> <p>Note: totals may not add due to rounding.</p>	Table 1						(\$ million)	2023-24	2024-25	2025-26	2026-27	Total	Estimated total budget	1.828	3.082	6.902	2.540	14.352	Less estimated National Partnership Payments	0.914	1.541	2.181	2.540	7.176	Balance of non-Commonwealth contributions	0.914	1.541	4.721	-	7.176
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Additional terms	The Commonwealth will provide up to 50% of total costs incurred by the ACT up to the total amount in Table 1. Commonwealth funding will be used for capital expenditure only and must not be used for administrative costs.																														

Program Plan

The Program Plan will outline how the ACT will implement energy performance upgrades in up to 5,000 existing social housing properties.

The Commonwealth will assess the effectiveness of ACT program activities in delivering energy upgrades to social housing.

The Program Plan will be used as part of the assessment process when reviewing progress against the Performance Milestones under this Agreement. The Program Plan will be reviewed and updated where required by the ACT, in consultation with the Commonwealth, on a yearly basis.

Evaluation of Initiative

The Commonwealth will evaluate the Initiative. To this end, the Commonwealth will conduct a mid-point evaluation in 2025 and an end of term evaluation in 2027. The ACT will cooperate reasonably with the Commonwealth, including providing data and/or the ACT program evaluation, in the conduct of the evaluations.

Performance milestones	Report due	Payment
<p>Milestone 1: Program Plan to enable ACT to successfully deliver on energy performance upgrades to social housing.</p> <ul style="list-style-type: none"> Program Plan, developed in consultation with, and to the satisfaction of, the Commonwealth, and conforming to parameters set out in Appendix A, containing: <ul style="list-style-type: none"> Implementation details, such as timelines, projected budget and expected outcomes (including number of properties expected to be impacted within each reporting period). Risk Management Plan Tenant Engagement Plan Evaluation and Data Plan, aligned to the Commonwealth guidance on evaluation and data for this initiative. Summary of all activities funded under this Agreement, as outlined in the Program Plan, for the period up to May 2024. This could include: <ul style="list-style-type: none"> Evidence of procurements underway Formal arrangements with program stakeholders where applicable, for example local Aboriginal Corporations and contractors. Evidence of advance work undertaken. Evidence of ACT co-contribution made to date and within reporting period, including alignment with projected budget as outlined in the Program Plan. 	10 business days after signing this Agreement	50% of costs for delivery of eligible activities up to \$0.914m
<p>Milestone 2: Annual Progress Report for the period commencement of the agreement to 30 June 2024</p> <p>Satisfactory progress against the Program Plan demonstrated through an Annual Progress Report, to the satisfaction of the Commonwealth, containing:</p> <ul style="list-style-type: none"> Summary of all committed and completed activities for this reporting period including: <ul style="list-style-type: none"> Committed and successfully delivered activities, aligned to the Commonwealth guidance on evaluation and data for this initiative. At a minimum, this must include: <ul style="list-style-type: none"> the number of social housing property upgrades completed, further divided type of housing (for example, public, community and/or First Nations) types and costs of energy performance upgrades installed in social housing properties any products or deliverables due within this reporting period, agreed to under the Evaluation and Data Plan. Evaluation findings or progress, for example estimation of the impacts of the energy performance upgrades (decreased energy consumption, decreased energy bills and/or increased thermal comfort of occupants). 	06/09/2024	50% of costs for delivery of eligible activities up to \$0.771m

<ul style="list-style-type: none"> Updated Program Plan, developed in consultation with, and to the satisfaction of, the Commonwealth. The Program Plan should reflect any changes to implementation, including changes in the work program, major delays or issues to-date. Audit and inspection compliance reporting, including number of upgrades inspected, pass/fail rates and rectification notices issued. Evidence of ACT co-contribution made to date and within reporting period, including alignment with projected budget as outlined in the Program Plan. 		
<p>Milestone 3: Interim Progress Report for the period 1 July 2024 to 31 December 2024.</p> <p>Satisfactory progress against the Program Plan demonstrated through an Interim Progress Report, to the satisfaction of the Commonwealth, containing:</p> <ul style="list-style-type: none"> Summary of all committed and completed activities for this reporting period including: <ul style="list-style-type: none"> Committed and successfully delivered activities, aligned to the Commonwealth guidance on evaluation and data for this initiative. At a minimum, this must include: <ul style="list-style-type: none"> the number of social housing property upgrades completed, further divided by type of housing (for example, public, community and/or First Nations) types and costs of energy performance upgrades installed in social housing properties any products or deliverables due within this reporting period, agreed to under the Evaluation and Data Plan. Progress of all activities tracked against the Program Plan, including any mitigation strategies where activities are deviating from the Program Plan. Evidence of ACT co-contribution made to date and within reporting period, including alignment with projected budget as outlined in the Program Plan. 	07/03/2025	50% of costs for delivery of eligible activities up to \$1.541m, less any payments made in Milestone 2
<p>Milestone 4: Annual Progress Report for the period 1 January 2025 to 30 June 2025.</p> <p>Satisfactory progress against the Program Plan demonstrated through an Annual Progress Report, to the satisfaction of the Commonwealth, containing:</p> <ul style="list-style-type: none"> Summary of all committed and completed activities for this reporting period including: <ul style="list-style-type: none"> Committed and successfully delivered activities, aligned to the Commonwealth guidance on evaluation and data for this initiative. At a minimum, this must include: <ul style="list-style-type: none"> the number of social housing property upgrades completed, further divided type of housing (for example, public, community and/or First Nations) types and costs of energy performance upgrades installed in social housing properties any products or deliverables due within this reporting period, agreed to under the Evaluation and Data Plan. 	05/09/2025	50% of costs for delivery of eligible activities up to \$1.091m

<ul style="list-style-type: none"> ○ Evaluation findings or progress, for example estimation of the impacts of the energy performance upgrades (decreased energy consumption, decreased energy bills and/or increased thermal comfort of occupants). • Updated Program Plan, developed in consultation with, and to the satisfaction of, the Commonwealth. The Program Plan should reflect any changes to implementation, including changes in the work program, major delays or issues to-date. • Data reporting for the mid-point evaluation, aligned to the Commonwealth guidance on evaluation and data for this initiative. • Audit and inspection compliance reporting, including number of upgrades inspected, pass/fail rates and rectification notices issued. • Evidence of ACT co-contribution made to date and within reporting period, including alignment with projected budget as outlined in the Program Plan. 		
<p>Milestone 5: Interim Progress Report for the period 1 July 2025 to 31 December 2025.</p> <p>Satisfactory progress against the Program Plan demonstrated through an Interim Progress Report, to the satisfaction of the Commonwealth, containing:</p> <ul style="list-style-type: none"> • Summary of all committed and completed activities for this reporting period including: <ul style="list-style-type: none"> ○ Committed and successfully delivered activities, aligned to the Commonwealth guidance on evaluation and data for this initiative. At a minimum, this must include: <ul style="list-style-type: none"> ▪ the number of social housing property upgrades completed, further divided by type of housing (for example, public, community and/or First Nations) ▪ types and costs of energy performance upgrades installed in social housing properties ▪ any products or deliverables due within this reporting period, agreed to under the Evaluation and Data Plan. ○ Progress of all activities tracked against the Program Plan, including any mitigation strategies where activities are deviating from the Program Plan. ○ Evaluation findings or progress for example, estimation of the impacts of the energy performance upgrades (decreased energy consumption, decreased energy bills and/or increased thermal comfort of occupants). • Evidence of ACT co-contribution made to date and within reporting period, including alignment with projected budget as outlined in the Program Plan. 	06/03/2026	50% of costs for delivery of eligible activities up to \$2.181m, less any payments made in Milestone 4
<p>Milestone 6: Final Report for the period of this Agreement.</p> <ul style="list-style-type: none"> • Summary of all completed activities for the reporting period 1 January 2026 to 30 June 2026, aligned to the Commonwealth guidance on evaluation and data for this initiative. At a minimum, this must include: <ul style="list-style-type: none"> ○ the number of social housing property upgrades completed, further divided by type of housing (for example, public, community and/or First Nations) 	04/09/2026	Up to \$2.540m

<ul style="list-style-type: none"> o types and costs of energy performance upgrades installed in social housing properties o any products or deliverables due within this reporting period, agreed to under the Evaluation and Data Plan. • Summary of the activities delivered and outcomes achieved over the period of this Agreement to the satisfaction of the Commonwealth. At a minimum, this summary will contain: <ul style="list-style-type: none"> o Total number of social housing property upgrades completed, further divided by type of housing (for example, public, community and/or First Nations). o Types and costs of energy performance upgrades installed in social housing properties. o Evaluation findings, including outcomes of all activities. For example, estimation of the impacts of the energy performance upgrades (decreased energy consumption, decreased energy bills and/or increased thermal comfort of occupants). o Data reporting for the end of term evaluation, aligned to the Commonwealth guidance on evaluation and data for this initiative. o Audit and inspection compliance reporting, including number of upgrades inspected, pass/fail rates and rectification notices issued. • Total ACT co-contribution made for the period of this Agreement. 		
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The Parties have confirmed their commitment to this schedule as follows:

Signed for and on behalf of the Commonwealth of Australia by



Senator the Honourable Jenny McAllister
Assistant Minister for Climate Change and Energy

[Day] [Month] [Year]

28 . 4 . 24

Signed for and on behalf of the Australian Capital Territory by



Andrew Barr MLA
Chief Minister and Treasurer

[Day] [Month] [Year]

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