Tenant Engagement Toolkit for Social Housing

A step by step guide to develop an effective retrofit project tenant engagement strategy

Department for Energy Security & Net Zero

MIDLANDS NET ZERO HUB

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Introduction

Context

There is an urgent need to improve the energy efficiency of the UK's housing stock[1]. The Social Housing Decarbonisation Fund (SHDF) delivered by the UK Government plays an important role in making social housing more energy-efficient and low-carbon. The Fund supports retrofitting and upgrading measures like insulation, heating system upgrades, and renewable energy installations. The overall aim of the Fund is to increase the proportion of homes with an Energy Performance Certificate (EPC) band C rating or better, alleviate levels of fuel poverty, and reduce carbon emissions. As a consequence, the Fund will improve living conditions for residents as their homes become more comfortable and easier to keep warm.

Evidence from previous schemes points to residents having mixed opinions about retrofitting[2]. While they welcome the idea of warmer and more affordable to heat homes, the process is often seen as inconvenient and disruptive. Effective engagement, communication and streamlined processes are crucial to address concerns about the number of visits and the overall duration of the retrofitting process.

Organisations participating in the SHDF scheme, as in any other publicly funded retrofit scheme, need to comply with the Publicly Available Specification (PAS) 2035 standard, which specifies that engagement with tenants of homes undergoing retrofitting is mandatory. Section 20 of the Landlord and Tenant Act 1985 also requires that leaseholders are consulted by landlords on any type of works carried out on their home.

Further to the compliance requirements, effective tenant engagement is crucial for retrofit programmes as it can become the main source of valuable insights with the potential to prevent future concerns, contributing to both a more tailored and successful retrofit process and result. Moreover, it ensures residents are actively involved and informed about the changes taking place in their homes. Fostering open communication with tenants also promotes cooperation, minimises disruptions, and enhances overall building user satisfaction, ultimately leading to the success of retrofit programmes.

[1] CCC. (2019). UK housing: Fit for the Future. Committee on Climate Change.
[2] Cameron-Smith, A. (2024, 9 January) *What does the resident think?* Unlock Net Zero. **unlocknetzero.co.uk/home/introducing/what-does-the-resident-think**

Purpose

The Midlands Net Zero Hub (MNZH) has developed the Tenant Engagement Toolkit (TET) for social housing to assist Local Authorities (LAs) and Private Registered Housing Providers (PRPs) in carrying out retrofit projects as part of their involvement in publicly funded schemes.

Although titled Tenant Engagement Toolkit for Social Housing, this toolkit may prove useful to audiences engaged in resident engagement more generally. Such an example would be LAs involved in the delivery of publicly funded residential retrofit programmes outside the scope of social housing (i.e., owner-occupied properties).

Objectives

The toolkit has the following objectives:

1. Enable housing providers to follow a step-by-step process to create a basic and effective tenant engagement strategy for a retrofit project.

2. Provide guidance on which parameters to consider to develop a more detailed engagement plan and tailor the strategy to their own tenants.

3. Provide examples of working communication templates to generate ideas on how to create bespoke engagement materials.

4. Encourage continued development of the strategy as users go through the retrofit journey.

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Structure

The toolkit is structured in two parts.

Part one begins with a step-by-step process using the OASIS framework as a basis to create the minimum version of a tenant engagement strategy.

Following this, Part two tailors the toolkit to address specific SHDF needs and provides further guidance on considerations regarding each stage of retrofit delivery (Planning, Installation, Handover), as well as the interactions with tenants within each stage. Included here are some of the commonly asked questions, barriers to retrofit, and examples of best practice.

Throughout the Toolkit, the terms 'tenant', 'resident', 'resident client' and 'occupant' are used interchangeably. Toolkit contents were sourced from publicly available materials and desk-based research on resident engagement more broadly.

The Midlands Net Zero Hub gratefully acknowledges the work, experience and advice of the following charities focusing on fuel poverty and energy efficiency in creating this toolkit: Act on Energy (AOE), Marches Energy Agency (MEA) and Nottingham Energy Partnership (NEP). Moreover, the contribution of SHDF wave 1 participants through lessons learnt.

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List of abbreviations & terms

AOE	Act on Energy
BEIS	Department for Business, Energy and Industrial Strategy
CJS	Customer Journey Support
CO2	Carbon Dioxide
DESNZ	Department of Energy Security and Net Zero (formerly Department for Business, Energy and Industrial Strategy)
EPC	Energy Performance Certificate
EWI	External Wall Insulation
FAQ	Frequently Asked Questions
GHG LAD	Green Home Grant Local Authority Delivery
HA	Housing Association
HVAC	Heating, Ventilation, and Air Conditioning
LA	Local Authority
LED	Light Emitting Diode
LGA	Local Government Association
LZC	Low/Zero Carbon
MEA	Marches Energy Agency
MEV	Mechanical Extract Ventilation
MNZH	Midlands Net Zero Hub
NEP	Nottingham Energy Partnership
OASIS	Objectives, Audience, Strategy, Implementation, Scoring
PAS	Publicly Available Specification
PRP	Private Registered Provider
Q+A	Question + Answer
RFA	Retrofit Assessment
RISE	Retrofit Information, Support and Expertise (formerly Social Housing Retrofit Accelerator)
RLO	Resident Liaison Officer
RP	Registered Provider
SHDF	Social Housing Decarbonisation Fund
SMART	Specific, Measurable, Achievable, Relevant, Timebound
SPOC	Single Point of Contact
TET	Tenant Engagement Toolkit
TPAS	Tenants Participation Advisory Service

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Part 1 Creating a tenant engagement strategy

Introduction

This first part of the toolkit uses the OASIS framework (Figure 1) to aid users in creating a straightforward tenant engagement strategy. Each of the five OASIS framework steps includes key questions that need to be answered, alongside supporting evidence for why they are important. Following this step-by-step process, and answering the key questions, ensures that users of this toolkit can create their own tenant engagement strategy.

OBJECTIVE DETERMINATION PAGE 9	Determine corporate objectives Determine communication objectives
AUDIENCE INSIGHT PAGE 12	Identify the audience and their energy and communication needs
STRATEGY DETERMINATION PAGE 13	Produce a strategic plan
IMPLEMENTATION PAGE 15	Develop a clear timeline of engagement with tasks centred around tenants Consider risks, barriers and mitigation actions
SCORING/ EVALUATION PAGE 17	Evaluate the key outputs and outcomes Determine the key learning Use feedback to modify the strategy

Figure 1 OASIS framework and the key tasks for each step

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Objective determination

Corporate objectives

What is the overall corporate objective?

The goal of the tenant engagement toolkit is to create a more inclusive and participatory housing environment, where tenants feel heard, valued, and supported, to contribute their needs, questions and experiences on energy use and indoor comfort with the goal to improve retrofit delivery and outcomes. Understanding that a successful retrofit project depends on how building systems, structure, and people interact, the tenant engagement strategy helps us consider tenants' needs alongside broader retrofit concepts, such as educating tenants about energy efficiency and carbon reduction.

What area of the organisation is tenant engagement work supporting?

Tenant engagement is particularly important when retrofitting properties, as it allows housing stockholders to gain valuable insight into tenant needs and priorities and to tailor their retrofitting plans with the resident's front and centre. This provides an additional layer of safeguarding against any unintended consequences of retrofitting (e.g., an increase in energy bills or misuse of newly installed heating systems).

What is the bigger picture?

Ultimately, effective tenant engagement prior, during and post retrofitting can lead to better outcomes for a range of stakeholders, including improved energy efficiency for the building stock; lower carbon emissions for the environment; reduced utility costs, and increased comfort and well-being for tenants. It can also help to ensure that retrofit projects are completed on time and within budget, with minimal disruption to tenants and with the intended design outcomes. This can overall improve the reputation of the organisation with regard to retrofit projects and increase tenant buy-in for future projects.

What is the specific department/team trying to achieve?

By engaging with tenants throughout the retrofitting process, housing stockholders can identify potential issues and concerns before they become major problems and work collaboratively with tenants to find retrofit solutions that meet everyone's needs. Moreover, involving tenants in the decision-making process can help to build ownership and buy-in for retrofit projects. Additionally, it can build trust and strengthen relationships between housing stockholders and their tenants, which can have long-term benefits for both parties and lead to greater long-term sustainability and project success.

Are there any SMART (S – Specific, M – Measurable, A – Achievable, R – Realistic, T – Time-bound) objectives?

Specific: Increase tenant engagement in retrofit projects by providing a range of accessible and inclusive engagement activities and channels tailored to different tenant profiles and needs, considering even the most hard-to-reach tenants.

Measurable: Increase tenant participation in retrofit projects by at least (set a specific goal) within the next 12 months, as measured by the number of tenants associated with the intended retrofit project who attend engagement activities, provide feedback, or express interest in participating.

Achievable: The engagement activities and channels are to be designed based on tenant profiles and needs and will use existing partnerships with community organisations and additional staff.

Realistic: The engagement activities and channels are to be designed for feasibility within the existing project timeline and budget, prioritizing efforts that have in the past proven to be effective in projects with similar characteristics.

Time-bound: The increase in tenant participation is to be measured and reported on a specific (set a reporting period – not more than monthly) basis over the course of the next 12 months, with adjustments made as needed to improve engagement efforts. A parameter that can be monitored is tenant drop-out rates and how these may change through the implementation of the tenant engagement strategy.

Who is leading tenant engagement and who do they report to?

Tenant Liaison Officer (or equivalent) reporting to SHDF project lead of Housing Provider or LA.

Communication objectives

Set out the role that communication will play in achieving the corporate objective. Make sure the objective is SMART, for example,

Specific: The objective is to engage with 100% of tenants participating in retrofit projects prior, during and post installation of improvement measures.

Measurable: The success of the objective will be measured by the level of participation and feedback received from tenants in the months after improvement measures are installed.

Achievable: The objective is achievable by incorporating tenant engagement strategies into the retrofitting process and providing multiple opportunities for tenants to share their feedback. The objective is relevant to the goal of creating a more inclusive and participatory housing environment, as well as to the broader objectives of improving energy efficiency, reducing utility costs, and increasing tenant comfort and well-being.

Realistic: The objective is realistic given the resources and capabilities of the housing stockholders and the scope of the retrofit project. It aligns with the current best practices for tenant engagement in retrofit projects and it is supported by the relevant stakeholders. The objective should also be feasible within the constraints of the retrofit project timeline and budget.

Time-bound: The objective will be achieved within a specified timeframe, such as the duration of the whole retrofit project, with regular check-ins and evaluations of progress. It is expected that the communication scope will change depending on the phase of the retrofit project (i.e., to encourage buy-in and participation in the retrofit scheme prior to the start of retrofit works vs to answer specific questions and manage expectations during the installation of measures).

Audience Insight

Identify the audience and their energy needs

Who are we targeting?

This is a key question to identify the diverse characteristics of various audience segments, such as vulnerable individuals, non-native English speakers, the elderly, and young families.

The primary audience for the SHDF scheme comprises occupants of social housing residing in energy-inefficient dwellings rated EPC band D or lower. Identifying suitable homes for inclusion in retrofit projects involves exploring various avenues, including internal data analysis and stock assessments. Consequently, the scheme will attract a broad spectrum of residents, each presenting unique needs and challenges throughout the retrofit process. This toolkit includes letter templates, as well as phone call scripts and home visit scripts to use. However, engagement should be tailored to suit the different characteristics of each resident.

The following questions relate to the building energy needs of the homes:

What is the typical building type for the homes?
(e.g., 3-bed terrace)

What are the typical heating systems in the homes?
(e.g., over 15yr old combi boiler)

What is the typical use of the primary heating system?
(e.g., 3 hours in the evening)

Housing data already available internally may answer some of these types of questions, but the Identifying Household Questionnaire provided here covers this extensively and records detailed information from the perspective of residents, including their needs and energy use patterns. A cover letter to attach to this questionnaire is also provided and explains to the resident the purpose of collecting this information. A phone call script is also provided to aid communication with residents who are not in the position to complete the questionnaire on their own and need assistance from someone who can complete it on their behalf over the phone.

Strategy determination

The Marketing Plan template can be used to create a communications strategy as it clearly lays out the tasks, deadlines, ownership and intended audience. Key questions for meeting the communications objectives include:

How are tenants targeted? What channels are being used?

Letters, in-person visits, phone calls, newsletters, emails, local community events, information packs, flyers, local information boards, community Facebook page, tenant intranet page and a one-point tenant contact in place by the housing provider are common channels used with different degrees of successful engagement outcomes depending on different tenant profiles. Use plain language and visual aids, as well as translations in different languages or interpreters when needed. Short video explainers on media channels such as YouTube have also proven useful for tenant engagement.[3]

What is the key message and supporting story?

It is important that the key message to the tenants is agreed by the housing provider's Tenant Liaison Officer, or similar, and made explicitly clear by the communications team who should provide a consistent voice. This should be communicated to tenants in a coordinated and consistent manner if a team of Liaison Officers exists.

It may be the case that the story is adapted to better engage tenants with different characteristics. This narrative also needs to cover the full retrofit journey and to retain coherence for tenants throughout the different retrofit project stages.

The following templates provide a way of communicating the message at different stages:

Introduction – Identifying Household Cover Letter and/or phone call script

Progress – Retrofit Assessment Notification Letter

Next steps – Works to Start Letter & FAQ Pack

Tips on creating engaging flyers are provided in Promotion Tips.

Are partners involved? [Is this a joint campaign or is there overlap with other organisations? Is coordination or collaboration needed or both?]

Are there any interdependencies? [Who else does this impact on?]

For effective tenant engagement, it is beneficial for the Tenant Liaison Officer/s to consider any potential interdependencies in terms of the installation works taking place within the given timeframe and location of the project,

[3] youtube.com/channel/UCX4RpZ7E321a7CbWeYdUbrw

as well as those concerning the life and daily routines of the tenants.

What does best practice look like? [Has another organisation already done this? What can be learnt from them?]

- Early and ongoing tenant engagement is crucial for successful retrofit projects. This involves engaging with tenants from the planning stage through to project completion (including monitoring) and providing multiple opportunities for tenants to share their feedback.
- Effective communication and collaboration are key to building trust and good relationships between housing stockholders and their tenants. This involves using clear and accessible language, being responsive to tenant concerns, and providing a single point of contact and regular updates on project progress.
- Tailoring retrofitting plans to tenant needs and preferences can lead to better outcomes for everyone involved. This involves considering tenant priorities such as energy efficiency, comfort, and affordability, and incorporating their feedback into retrofitting plans.
- Involving tenants in the decision-making process can help to build ownership and buy-in for retrofit projects, leading to greater long-term sustainability and success.
- Providing education and support for tenants on the benefits of retrofitting can help to increase participation and engagement in the process. This involves providing information on the potential cost savings, energy efficiency improvements, and health and well-being benefits of retrofitting.

Overall, these lessons highlight the importance of tenant engagement in retrofit projects and the need for housing stockholders to prioritize communication, collaboration, and tailored solutions to achieve the best outcomes for their tenants and their organisation.

Implementation

What are the timings and key dates? [When does the campaign start and how long does it run for?]

Develop a clear timeline of engagement that includes all stages of the retrofit project (planning, installation, handover) broken down into tasks centred around tenants. Note the duration of the task and any overlaps with other ongoing or scheduled works on the premises.

Who is delivering it? [Note: a detailed action plan can be done separately but should also be stored in a shared area]

Assign the team or person responsible for coordinating or carrying out each engagement task.

However, adjacent retrofit project teams need to also be informed of the general action plan. This creates good coordination between teams and allows for responsive tenant updates whenever installation schedules change, and delays are expected to occur.

What is the budget? [How will this work be resourced? Is there a budget and how will that budget be split between channels?]

Provide clear costings for each of the engagement methods selected in terms of staffing and resources.

What channels will be used? [More information on the channels to be used]

List the selected channels to be used as well as the targeted tenant types these are tailored for.

What is the reporting and sign-off process? [Who needs to sign off this plan?]

Record engagement activities and attempts with each tenant as this will benefit developing lessons learnt and identifying channels/timings that were more or least effective with different tenants.

List the persons within the organisation responsible for recording and signing off each engagement task.

List the persons who need to have a high-level view of how engagement activities are progressing (e.g., the retrofit coordinator) for the purpose of improving coordination among retrofit professionals, avoiding scheduling clashes and allowing time for tenant expectation management when changes need to take place.

What are the risks? [What are the risks, mitigations, and barriers to the objectives?]

Risks:

- Lack of interest or participation from tenants.
- Resistance or opposition from tenants to proposed retrofitting plans.
- Limited resources or capacity to effectively engage with tenants.
- Miscommunication or misunderstandings between housing stockholders and tenants.
- Failure to address tenant concerns or incorporate their feedback into retrofitting plans.

Barriers:

- Limited access to technology or online platforms for tenant engagement.
- Language or cultural barriers that make it difficult to effectively communicate with tenants.
- Tenant turnover or a lack of continuity in tenant engagement.
- Limited trust or a history of strained relationships between housing stockholders and tenants.
- Refusal from tenants to allow access to property.
- Limited time or budget for tenant engagement activities.

Mitigation strategies: The mitigation strategies below can be used to mitigate more than one of the risks and barriers above.

- Provide incentives or rewards for tenant participation, such as reduced utility costs or community benefits.
- Address tenant concerns early on and provide regular opportunities for feedback throughout the retrofitting process.
- Use partnerships with community organisations or hire additional staff to support tenant engagement efforts.
- Use plain language and visual aids to communicate with tenants, and provide translations or interpreters as needed.
- Develop a clear and transparent process for addressing tenant feedback and incorporate their ideas into retrofitting plans.
- Use multiple channels for tenant engagement, such as in-person meetings, online surveys, and community events, to reach a diverse range of tenants.
- Build trust with tenants through regular communication, transparency, and responsiveness to their concerns.
- Provide a suitably trained dedicated single point of contact for tenants to build interest and trust, maintaining good relationships throughout the retrofit process and possible delays.
- Prioritise tenant engagement activities in project planning and budgeting to ensure adequate time and resources are allocated.

Scoring/Evaluation

What are the outputs? [What is to be delivered in terms of number of properties, number of measures, number of tenants engaged, number & types of engagement? Think about distribution, exposure, reach and engagement]

Supporting residents once retrofit works are completed is of paramount importance for the expected carbon, energy and financial saving goals to be realised.

For this reason, it may be beneficial for the housing provider to consider supporting the installer handover process with the Tenant Liaison Officer/s, as often installers are not trained to provide building user advice and less so to tailor advice to residents with different characteristics.

An **end of install questionnaire** template can be used as the basis for capturing the residents' experience, to inform future tenant engagement efforts, as well as provide energy use considerations for future retrofit designs.

Alongside this, a **home energy diary template** for residents to complete provides data that allows a quantitative analysis of the installed measures.

When the overall outputs of the retrofit project have been identified, consider distributing these in a simple format relevant to the tenants.

Including the tenants in this final step of the project can boost pride in their contribution and help spark and/or maintain their interest and prolonged engagement with the newly installed retrofit works in their homes, which will only support achievement of the intended retrofit, energy and carbon saving targets.

What are the corporate outcomes? [The result of your activity on tenants, such as impact, influence, effects e.g., change in attitudes and behaviours]

- **Reductions in maintenance costs:** Knowledge acquired by tenants throughout the retrofit process regarding their home, the systems installed, heat retention, energy bill saving practices and behaviours contributes to tenant appreciation of the retrofit outcomes and increased understanding and interest in using the systems as intended which reduces maintenance requests and costs.
- **Improved tenant satisfaction and retention:** Effective tenant engagement can lead to increased tenant satisfaction and retention, resulting in a more stable and engaged tenant community.
- **Enhanced project outcomes:** Tenant engagement can result in improved retrofitting outcomes, as engaged tenants are more likely to provide valuable feedback and ideas, leading to a more effective and sustainable retrofit project.
- **Positive impact on organisational reputation:** Successful tenant engagement can help to build a positive reputation for housing stockholders, demonstrating their commitment to tenant engagement, sustainability, and community well-being.
- **Increased stakeholder buy-in:** Tenant engagement can also increase buy-in from stakeholders, such as local authorities or housing associations, who value tenant engagement and community involvement in retrofit projects.
- **Improved alignment with regulatory requirements:** Tenant engagement can also help housing stockholders to comply with regulatory requirements related to energy efficiency, sustainability, and tenant involvement.
- Increase tenant awareness of climate change and sustainability and empower them to continue along a sustainability journey.

Overall, effective tenant engagement can result in a range of positive corporate outcomes, including reduced maintenance costs, improved tenant satisfaction and retention, enhanced project outcomes, positive impact on organisational reputation, increased stakeholder buy-in, and improved alignment with regulatory requirements.

Were the objectives met?

For each initial project objective, reflect on and identify the degree this was met throughout the tenant engagement process. Note implications on such objectives as: facilitating the delivery of an efficient retrofit project with minimal impact to tenants, increasing tenant indoor comfort, reducing energy bills, and creating more energy efficient homes.

What are the key learnings? [What worked well? What could be done differently? What could be fed back to each of the installers / liaison officers / PAS 2035 roles / energy champions / comms team]

What is working well in tenant engagement projects?

- Is there clear and effective communication with tenants, including regular updates and opportunities for feedback?
- Which communication channels are most effective for maintaining the interest of different tenant categories based on demographic characteristics?
- Are incentives or rewards provided for tenant participation, such as reduced utility costs or community benefits?
- Are partnerships leveraged with community organisations or additional staff hired to support tenant engagement efforts?
- Are plain language and visual aids used to communicate with tenants, and are translations or interpreters provided as needed?
- Is there a clear and transparent process for addressing tenant feedback and incorporating their ideas into retrofitting plans?
- Is trust being built with tenants through regular communication, transparency, and responsiveness to their concerns?
- Are tenant engagement activities prioritised in project planning and budgeting to ensure adequate time and resources are allocated?

What could be done differently in tenant engagement projects?

- Could a wider range of tenant perspectives be incorporated, including those from historically marginalised or underrepresented groups?
- Could more training or support be provided to installers, liaison officers, PAS 2035 roles, and energy champions to ensure they have the necessary skills and knowledge to effectively engage with tenants?
- Could a wider range of engagement activities be offered to reach a more diverse range of tenants, such as in-person meetings, online surveys, focus groups and community events?
- Could transparency around the decision-making process be increased and tenants engaged more directly in the development of retrofitting plans?
- Could issues related to equity and access be addressed, such as providing technology or language support for tenants who may face barriers to engagement?

What feedback could be given to each role involved in tenant engagement projects?

- **Installers:** How effective and accessible are engagement activities, where could they provide more support to tenants during the retrofitting process, what kind of training is needed to be able to do this?
- **Liaison officers:** How effective are their communication and engagement strategies, and what suggestions do tenants have for improving reach, participation, and feedback collection methods?
- **PAS 2035 roles:** How effective is the overall retrofit project, and what suggestions do tenants have for incorporating their feedback into the decision-making process?
- **Energy champions:** How effective are their engagement activities, and what suggestions do tenants have for reaching a wider range of tenants and addressing issues related to equity and access?
- **Comms team:** How effective are communication strategies, channels and materials, and what suggestions do tenants have for feeling more involved and benefiting from transparency throughout the retrofitting process?

Part 2 Considerations for a tenant engagement strategy

Introduction

Part two of the toolkit is broken down into five main sections (Figure 2). It begins with an overview of the key elements for an effective engagement strategy. This is followed by the engagement elements to consider within the PAS 2035 framework. The section then addresses each of the three main stages of a retrofit programme of works: planning, installation, and handover.

Each of these stages is discussed in terms of the following:

- Key aspects to note and why these are important
- Resident questions the PRP/LA should be prepared to answer (or address even without the resident asking)
- Key restrictions for PRP /LAs and occupants

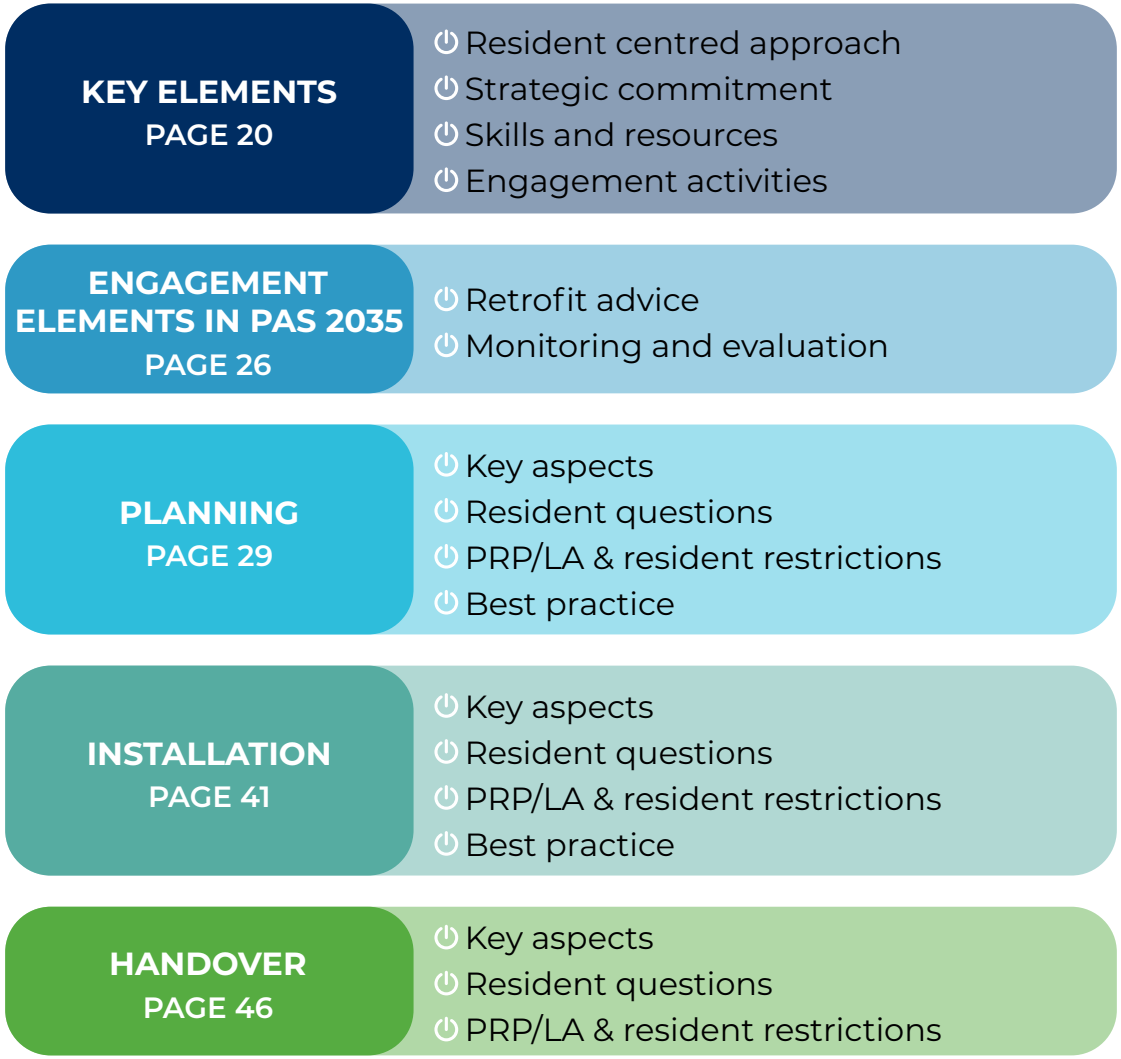

Figure 2 Overall structure of Part 2

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Key elements of an effective tenant engagement strategy

The starting point for developing an effective retrofit strategy as a whole and not just a tenant engagement strategy is the notion that a building serves the needs of people and behaves according to their behaviour. In the case of residential buildings, occupants have an emotional connection to their homes, making any change to this type of building all the more important to them.

Resident cooperation is key in carrying out any building works. For this reason, it is paramount that residents are informed about what to expect, or at least, about how every stage of the retrofit process will affect their lives. This improves the feeling of control they have over a situation that largely appears to be out of their hands (especially in the case of social housing tenants) and a sense of empowerment.

The following section draws on multiple literature sources to synthesise some of the key findings on the elements of a good tenant engagement strategy included here:

- Embedding a positive resident-centred culture.
- Securing strategic commitment for tenant engagement.
- Ensuring staff are suitably trained and well resourced.
- Ensuring that residents and their unique needs are well understood and addressed.
- Compiling a wide range of activities to reach and involve all residents.
- Developing an effective complaints service to support a wider place-shaping and leadership role in improving communities.
- Employing effective ways to measure and report the outcomes of tenant engagement work.

Expanding each of these points in turn:

Creating a positive resident-centred culture

- Pay close attention to resident feedback, as residents know their homes and behaviour patterns best (although they don't view them as such). Understand their concerns, lifestyles, comfort needs, health issues, and financial restrictions to tailor project delivery accordingly.
- Including tenant consultations as part of decision making is an excellent way to involve tenants with decisions that directly impact them. However, it is important not to do this if a decision has already been made, as it will reduce trust.

- Aim to conduct meetings in easily accessible locations and at times that suit tenants to encourage participation. Use community centres and organise events such as coffee mornings to create a collaborative and relaxed atmosphere. Be aware that certain locations may be perceived as ‘belonging’ to a certain group and could prevent inclusion.
- Maintain a presence within the community to create rapport and work against the commonplace notion of “they only get in touch when they want something” (TPAS, no date).

Securing strategic commitment

- Sell the project’s benefits, including energy bill savings, enhanced long-term comfort and wellbeing, improved energy efficiency, and environmental benefits.
- Engage internal colleagues who understand the residents and can aid project delivery, including customer service personnel.
- Initiate community engagement as soon as possible to establish trust and maximise resident involvement while preventing the spread and impact of misinformation.
- Map the resident journey through the retrofit process to pinpoint areas where engagement is essential.
- Develop a structured engagement plan with sufficient time for meaningful interactions to take place within the project timeline.

Securing suitable skills and resources

- Consider training, upskilling and/or employing local residents, or trusted members of the community, as they already understand the range of residents and the characteristics of the community and can tailor comms materials, channels and approaches to the different types of residents (RISE, 2022).

- Consider the use of local champions to engage with hard-to-reach residents and build a bridge between residents and the project team (LGA, 2019).
- Use the expertise of individuals with backgrounds in resident liaison or customer service. Tap into the support capabilities of a tenant liaison officer for a dedicated role within the engagement team who would regularly monitor project progress and work quality (LGA, 2019).
- Instead of overwhelming residents with extensive factsheets, allow energy experts to choose the most relevant documentation to discuss during visits and to leave with residents after (BEIS, 2016).
- Ensure Resident Liaison Officers (RLOs) possess a strong understanding of the resident engagement plan and accessible engagement materials.
- Organise internal coaching sessions for resident liaison teams and customer contact centres. Options include hosting workshops, informational sessions, or training on retrofit projects and required documentation.
- Ensure all members of the team are on the same page regarding the messages conveyed to tenants. Convey updates to these messages to all members of the team at the same time and schedule regular team catch ups to ensure all members have the same level of understanding. Use a single agreed channel for team updates to ensure uniformity across the messages.
- Consider the benefit of using bilingual staff depending on local languages used within pockets of residents in the area.
- Develop scripts for use by engagement officers to promote consistency and uniformity of information circulated. For complex issues (i.e., leaseholder legal matters) consult the relevant professionals (i.e., legal advisor) who can provide simplified language scripts to avoid miscommunicating the message or essence of the communication.

Understanding resident needs

- Prioritise meeting the diverse needs of homeowners and removing any engagement barriers in the delivery process. Consider tenants with physical and mental health issues, dementia, neurological differences, learning needs, or language barriers. Adapt engagement materials for inclusivity.
- Provide visual and written materials translated in different languages and utilise bilingual staff or offer translators when needed.

- Ensure early distribution of written information along with written summaries post face-to-face interactions. Consider large print materials and employ visual aids like diagrams for clarity. Avoid the use of continuous text across multiple pages and break it up with schematics and photos to sustain visual interest. Keep written information succinct and clear.
- Be attentive to hearing issues and conscious of the speed used in verbal communication (may need to slow down for various reasons). Use Speech-to-Text Reporters and British Sign Language translators when needed,
- Cater to residents with sight problems by offering transcription services, Braille materials, and involving family members or caregivers. Allow extra time for face-to-face visits.
- Address cultural, ethical, and religious differences. Tailor materials and engagement techniques, and be aware of cultural etiquette, such as shoe removal inside homes.
- Increase face-to-face support where possible, recognising that some residents may not have online access.

Develop a range of engagement activities

- Explore diverse engagement methods across multiple channels/formats.
- Present and discuss case studies of similar, nearby or successful retrofit projects in community events or workshops.
- Consider resident focus groups with the participation of the tenant engagement team and even retrofit design or coordinator team.
- Consider design charades where residents share their concerns, needs and aspirations for their retrofitted home.
- Organise group visits to exemplar physical homes.
- Develop and circulate a list of retrofit relevant demonstrations residents could visit (could involve activities for children education and play).
- Investigate partnerships with local parishes, health support groups, schools, libraries and community centres.
- Consider using a mobile point of interest, communication and advice on retrofit or the specific project (e.g., a modified van) that could participate in existing non-retrofit events planned by partner groups that engage with the targeted residents.

- Develop a social media presence that is engaging, updated regularly and transparent throughout the stages of the retrofit project.
- Experiment with different communication and promotional materials and use feedback surveys to determine the preferred contact methods for different resident types.

Develop an effective Q&A, complaints and feedback service

- Assign, if possible, a single point of contact per household throughout the project life, as it is deemed to increase trust and confidence in the project.
- Maintain ongoing two-way communication with residents throughout the project. Demonstrate an active interest in resident opinions and the importance of their feedback, showing they are listened to, and their concerns are acted upon.
- Develop and update a list of Q&As both as printed material and online (can be broken up in themes of retrofit stages).
- Include the complaints phoneline and/or email address and/or responsible complaints contact person in all materials to increase resident confidence and trust.
- Establish a dedicated resident liaison team for regular engagement with residents that includes spreading good news and engagement opportunities, not just requests for consent or access. When dealing with leaseholder tenants, address cost and legal complexities directly through written, digital, and face-to-face communication (noting the accuracy and consistency of simplified language used – may need to consult legal/finance advisor).
- Communicate how the work will impact on residents' lives and homes in a simplified and informative manner and be responsive to resident concerns and aspirations.

Measure and report outcomes

- Use engaging presentation and visualisation methods to present simple easy to understand schematics (i.e., energy bill reduction with coin/currency visuals, carbon reduction with trees saved, etc).
- Circulate positive outcomes not only to residents involved, but also to neighbouring areas through partner organisations (i.e., social media, newsletters, posters etc) during and especially after project completion to increase pride in participating and engagement in maintenance.
- Develop and circulate resident feedback surveys not only at project handover but also 3-12 months after, as information may contain further praise of project outcomes, surprising insights and/or concerns/risks that have an easy fix and can be mitigated with minimal effort and cost (i.e., engagement officer repeating how to operate the heating system, need for large font plasticised step by step guide to effective ventilation practices etc).
- PAS 2035 includes monitoring requirements post-handover[4]. The Retrofit Coordinator involved in the project may have access to resident feedback and/or measured data of in use energy demand post retrofit.

4 BSI. (2023b). PAS 2035:2023, Retrofitting dwellings for improved energy efficiency – Specification and guidance. BSI Standards Limited (Section 13 p.27)

‘Engagement’ elements within PAS 2035

NOTE: Below we only reference the new version of the standard, i.e., PAS 2035:2023. This makes the text more simple and more relevant, than had we tried to also incorporate the outgoing version.

PAS 2035:2023 is available free, and can be downloaded at this address: **knowledge.bsigroup.com/products/retrofitting-dwellings-for-improved-energy-efficiency-specification-and-guidance-2?version=standard**.

PAS 2035 references the guidance for retrofit advice that is contained in: *‘Supporting the delivery of energy efficiency advice to consumers during smart meter installation’* - which can be downloaded at this address: **www.gov.uk/government/publications/best-practice-guidance-for-the-delivery-of-energy-efficiency-advice-to-households-during-smart-meter-installation-visits**. **This is a useful page including a number of factsheets etc.**

Introduction

There are two areas within PAS 2035 that relate directly to an engagement strategy for retrofit. These are: **Retrofit Advice** and **Monitoring & Evaluation**.

PAS 2035 includes some quite specific requirements around retrofit advice. These are significantly beyond what is typically delivered in the majority of SHDF projects. However, the retrofit advice framework in PAS 2035 is clear and this will provide a robust basis for retrofit advice with projects. The full detail for retrofit advice is in Section 12 of PAS 2035. Below, we provide the headline framework and pick out some key reference points.

The monitoring & evaluation requirements of PAS 2035:2023 are relatively light. Although these are also beyond what is delivered in many SHDF projects. The standard mandates ‘Basic’ monitoring, which only requires a questionnaire. More involved ‘Further’ monitoring is only required if: there are unintended consequences; the intended outcomes are not achieved; or if a more detailed monitoring plan is designed into the project from the outset.

PAS 2035:2023 Section 12 Monitoring and Evaluation

Key Points from PAS 2035

- “12.1.1… *All retrofit advice delivered in connection with domestic retrofit projects shall be overseen by the Retrofit Coordinator.*”
- “12.1.4 *Retrofit advice shall be provided to householders at the following points in the retrofit process:*”

  a) initial engagement / inception of project

b) on completion of the Improvement Options Evaluation (IOE)

c) on completion of design

d) handover / completion of installation.

- Sections 12.1.5, 12.1.6, 12.1.7, and 12.1.8, set out the PAS 2035 details for the retrofit advice at each of defined points.

Key 'Retrofit Advice' notes for your engagement plan

- Do not simply rely on your Retrofit Coordinator to lead your Retrofit Advice. You should have a clear plan for the delivery of Retrofit Advice within your delivery team.
  - Who will do what, how, and when?
- Do use the 'delivery points' from PAS 2035 as natural points to engage with tenants. In practice the IOE and Design stages are often merged in project delivery, as they inform each other.
  - The PAS 2035 engagement points map with the delivery Stages in this document (Table 1):

Table 1 PAS 2035 engagement points mapped to Engagement Strategy Stages

PAS 2035	Engagement Strategy Stages
Engagement / inception	Planning
IOE Design	Install
Handover Monitoring & Evaluation	Handover

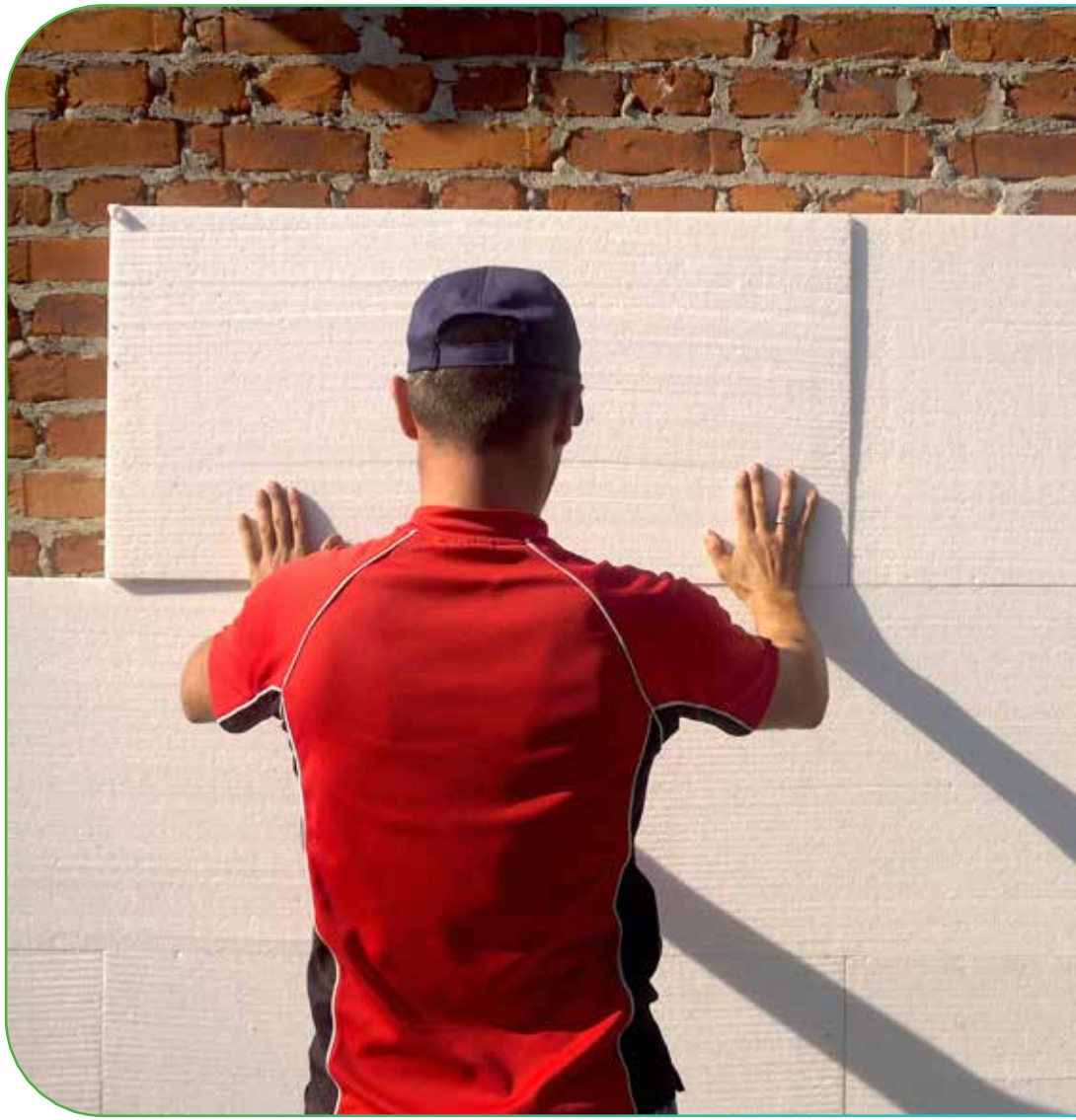
PAS 2035:2023 Section 13 Monitoring and Evaluation

Key points from PAS 2035

- "13.1 The Retrofit Coordinator shall evaluate every Retrofit Project…"
- "13.4.1 Basic evaluation shall include a measure specific questionnaire…""
- "13.4.2 The Retrofit Evaluator shall collate the information… and circulate…[including] to the client… a summary… recommendations…[etc]"

Key 'Monitoring and Evaluation' notes for your engagement plan

- Do make a monitoring and evaluation plan right at the start of the project,
  - And check that it will answer any questions that you have.
- PAS 2035:2023 says that the Retrofit Coordinator shall evaluate every project. This is a change in the new PAS 2035 – check that your Retrofit Coordinator will be doing this (especially if your project was procured during the previous version of the Standard).
- Do review your findings to:
  - understand the tenant experience and project impact,
  - inform future projects and retrofit thinking.



Stage 1 Planning

Key aspects - what is important and why?

Relevant Information Gathering: Project planning is based on the available information at hand and contributes to a smooth-running project. Important questions to answer include:

- **Is the available information adequate, relevant to the specific project/residents, and up to date?**
- **What are the likely barriers and how to deal with these?**

Be aware that the policies and regulations governing retrofit in the United Kingdom are always subject to change. It is therefore important to keep up to date on, for example, Building Regulations (HM Government, 2010), retrofit compliance schemes such as PAS 2030/2035 (BSI, 2023; 2023b), and the requirements of Government grant funded schemes.

If general information is used, or data from previous projects, ensure this remains relevant to the specific project at hand. Be aware of the differences, adjust expectations and tailor the information to the parameters of the specific project to make it relevant.

Furthermore, any measurements (i.e., temperature, humidity, total heating energy expenditure from bills) gathered at this stage are significant for comparing against corresponding measurements required in your evaluation plan or after the handover stage. This will provide a tactile measure of the impact of the installed retrofitting measures on the indoor environment, energy demand and energy bills of the home.

Identifying Key Stakeholders. Identifying and categorising stakeholders, along with understanding their level of influence or potential influence, is crucial when planning a retrofit project. This is especially important to avoid any conflicts or disagreements that may arise if a key stakeholder is not fully on board, and even drop-out. Failure to secure the support of essential stakeholders could pose a risk and potentially impact the success of the project during its implementation phase.

Key questions to answer

The following questions are important for residents to ask at the planning stage of a retrofit project. Having these answered prepares residents for the installation stage and increases the likelihood of the retrofit outputs meeting their needs and objectives at and post the handover stage.

What are the retrofit objectives?

The resident could be invited to imagine how they would like their house or the feeling within it (i.e., comfort levels) to be like after the retrofit works take place. Then help them identify the specific reasons for wanting to retrofit their home (i.e., energy efficiency, comfort, safety, aesthetic improvement etc).

How will the quality and high standard of the installed measures be assured?

Explain that this is one of the purposes of PAS 2030/35 standards, that the retrofit process described in PAS 2035 has this function and that both standards need to be adhered to throughout the project when it is funded even partially by public funds.

What is PAS 2035, and why is it important for my retrofit project?

PAS 2035 is a UK standard for retrofitting that outlines the required practices for improving the energy efficiency of existing homes. It's important for your retrofit project because it ensures that the work is carried out to a high standard, resulting in energy savings, reduced carbon emissions, and increased comfort and health in your home.

What are the steps involved in the retrofit process according to PAS 2035?

The steps in a PAS 2035-compliant retrofit process typically include initial assessments, surveys, design, installation, quality control, and post-installation evaluation. These steps are designed to deliver effective energy-efficient improvements while ensuring compliance with the standard.

What are the building codes/regulations that need to be followed for the retrofit?

Refer to PAS 2035 (2023) as it cites key ones in Section 2: Normative references, page 2.

What are the environmental implications of the retrofit?

In the answer consider the impact of, for example, energy savings to the grid, material selection to natural resources, carbon footprint reduction as a whole, noise pollution to the local area.

What professionals are needed for the retrofit? Who sources them and manages the relationship with them?

Be transparent about who the different installers are that will eventually access the resident's home, explain who is funding the project, as well as the roles prescribed in PAS 2035 (2023) and how these are connected under the Retrofit Coordinator.

Who is going to be the tenant engagement point of contact for any questions before/during/after installation?

Provide contact details for members of your organisation the resident will be engaging with as well as contact details for complaints and questions.

What are the specific retrofit works that would improve energy efficiency in the specific home?

Although a Retrofit Assessment and Improvement Options Evaluation are needed to provide an answer for a specific home, it is useful at this point to have at hand visual information of the most popular retrofit measures explained in simple terms and a simple process map illustrating the retrofit work selection decision making rationale.

What are the expected potential bills savings and benefits over time from retrofitting the home?

Provide a visual of heating/electricity/energy bills and how these would change/decrease after installation. Use the opportunity to inform residents that for the new measures to effectively reduce bills they need to adhere to suitable system or building use post-installation. Provide a couple of examples and assure them that you will be walking them through how to do this when measures are installed.

How will the retrofit impact daily resident life/ schedules during construction?

Be transparent in discussing among others: disruption, noise, inconvenience, allergies, home and vehicle access, parking, cleaning up). Provide scheduling options as early as possible and explore timetabling considering resident availability and lifestyle. Also, inform residents about restrictions (i.e., inclement weather conditions) that may affect scheduling. Finally, provide a realistic timetable with the duration of disruption to resident lives.

Do you have experience with PAS 2035-compliant retrofits, and can you provide examples of previous projects?

Compile a short list of 1–2-page case studies of homes previously completed with before and after photos, as well as testimonials from residents. If prior consent has been obtained, investigate the possibility of using tenants of previously completed homes as project champions.

How will the energy performance of the home be assessed before and after the retrofit?

Explain that an Energy Performance Certificate (EPC) assessment will take place before the retrofit to establish the home's baseline energy performance. After the retrofit, a post-installation assessment will be conducted to measure the effect of the improvements and to ensure that the intended energy efficiency goals are met.

Are there any potential health and safety concerns associated with retrofit either during or after installation?

Discuss the impact on indoor air quality, the need for controlled and regular ventilation, the impact of internal materials (consult installers or accreditation bodies for information based on warranties of retrofit materials used and perform desktop research on health impacts).

Have energy-efficient appliances and light fixtures already been considered? Is there need/ opportunity to change to these?

Be transparent about organisational considerations regarding these parameters, as residents may have specific trends in mind. Be clear about the boundaries of where your organisational responsibility regarding energy reduction lies and where the residents' responsibility begins.

How will the retrofit impact the home aesthetics and design? Are there going to be options available and an opportunity to be involved in design decision making?

If external and internal finishes are standard across the specific retrofit project and there is no room for options, be transparent about organisational considerations affecting these parameters (i.e., value for money, durability, specific weather performance) as residents may have specific trends in mind. Be clear about any appearance and design restrictions that will apply after the retrofit project is completed limiting any future changes (i.e., restrictions on changing the render of externally insulated walls).

Key restrictions for client (PRP/LA) and resident

During the planning stage of retrofitting a home the retrofit client (PRP/LA) needs to work within the following key restrictions:

- Ensure occupant circumstances comply with eligibility criteria of government retrofit schemes/incentives/rebates.
- Seek clarifications regarding general retrofit scheme policies that lead to grey areas in terms of eligibility/criteria when occupant or home circumstances are out of the usual. Explore available government incentives or rebates for energy-efficient retrofits and incorporate eligible measures into the plan.
- Ensure proposed retrofit works are within government cost caps per home, per measure and funding period.

During the planning stage of retrofitting a home the resident may face the following restrictive elements:

- Fear of the unknown (i.e., no experience of construction works, installers entering the home, disruption, overload of new information)
- Special circumstances (i.e., persons with disabilities, elderly, infants)

- Incomplete understanding of the retrofit process and what is required by the occupant, which could lead to future drop-out if there is lack of clarity from the engagement officer or informational materials.
- Lack of trust and confidence in LA, in central government or in retrofit programmes.
- Dissipating initial engagement and occupant enthusiasm if communication with the engagement officer is not consistent, clear and honest.

Best Practice Tips

In identification and categorisation:

- Identify stakeholders (e.g., RLOs, Landowner Associations, Housing authorities) based on influence and categorise by impact on the project (risk portfolio).
- Support tenants with particular needs around language, IT skills, care and support which include interpreters, financial inclusion, warden services, reactive repairs, planned maintenance, anti-social behaviour, and housing officers.

In stakeholder engagement awareness and education:

- Face to face and telephone contacts have been identified by experienced tenant engagement managers as methods that "result in a more sustained and improved tenant engagement", lead to quick issue resolution and prevent difficulties with installers.
- Create a detailed website and social media channels for programme promotion and updates.
- Develop a communication plan for stakeholders, meeting with regional Customer Panels (Installers, Community Representative, and Local Authority) to spread the word.
- Host online meetings for residents to learn about the project, with live Q&A sessions.

In establishing a Single Point of Contact (SPOC):

- Use in-person approaches, such as workshops or association meetings face-to-face in schools, community centres, leisure centres, village halls, churches.
- Use mobile marketing through outreach vans tailored with promotional materials and branding.
- Conduct personal home visits to explain the programme and address queries. This is especially important for hard-to-reach tenants and those with special needs.
- Communicate a commitment to greener homes, emphasising environmental targets and benefits to the tenants and neighbourhood.
- Issue detailed communications to households for surveys and proposed works, including order of works, impact, and key contacts.

- Create a resident information pack/brochure covering key details about the programme.

In representation:

- Invite tenant association representatives during planning at governance and/or operational levels to increase buy-in. Also, at future meetings for ongoing dialogue.

In individualisation (unique needs and requests):

- Focus engagement on direct contact with specific homes based on eligibility criteria.
- Collect detailed information on language and communication preferences.
- Review vulnerabilities and additional needs through local housing teams, developing specific plans for households that require extra support.

Best practice example (EWI leaflet)

On the following pages we present an excellent example of an information leaflet provided to tenants who are having EWI installed in their home, which covers all 3 stages discussed in this section.

WILL MY PERSONAL DETAILS BE SHARED WITH ANYONE?

So that our contractors can contact you to plan and carry out the works, and to invite you to take part in a satisfaction survey, we share some of your personal data with them.

This is done in accordance with Data Protection Legislation (the General Data Protection Regulation (EU) 2016/679 and the Data Protection Act 2018) and within the terms of ___'s Privacy Notices.

___ is a values led company and we treat e veryone that comes into contact with us, at any level, according to thesevalues:

Integrity, Diversity, Openness, Accountability, Clarity and Excellence.

We believe our service goes beyond simply repairing and refurbishing homes. We aim not only to raise the standard of our properties, but also to make a positive impact on the lives of the residents.

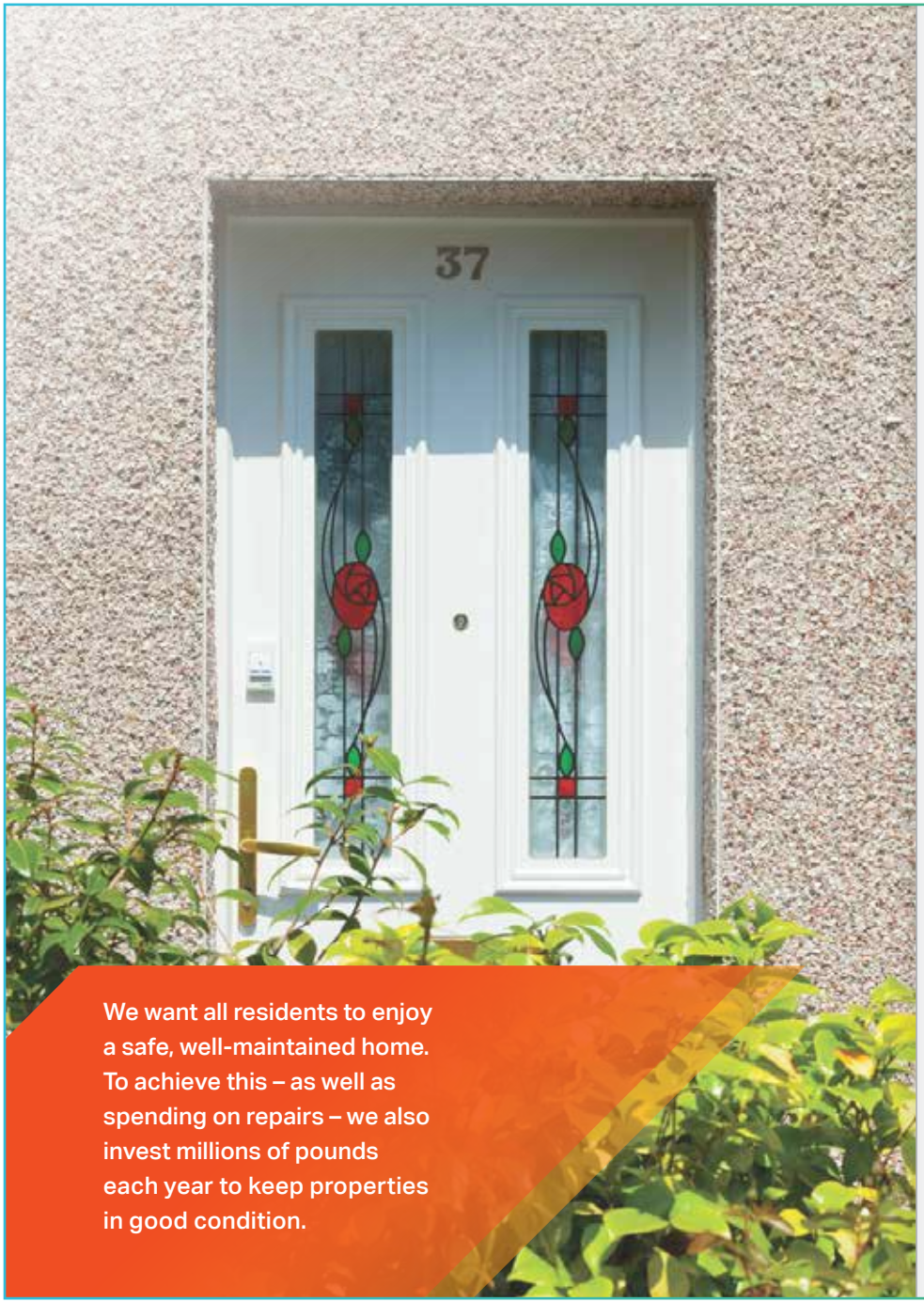
Contact ___ on:

T :
E :
W:

Helping to keep your home warm and well

External wall insulation

What you can expect during and after the works



We want all residents to enjoy a safe, well-maintained home. To achieve this – as well as spending on repairs – we also invest millions of pounds each year to keep properties in good condition.

WELCOME

As you know, we have identified your home as one that will benefit from new external wall insulation (EWI).

As a reminder, the advantages to you of this work are:

- Your home will retain 45% more heat, making it much warmer and cheaper to run
- Fresh render gives you a brighter, cleaner looking home
- It helps seal your home from the weather, reducing the risk of damp and mould problems.

IMPORTANT!
Please take the time to read this booklet and feel free to ask any questions.

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WHAT THE WORK INVOLVES

In our previous letters we let you know that we have appointed a specialist company _____ to carry out this work.

The external wall insulation (EWI) work has several stages:

- Stage 1 – Retrofit assessment
- Stage 2 – Asbestos survey
- Stage 3 – Pre works visits
- Stage 4 – Preparation works – Scaffolding installation, asbestos removal (if required) plumbing/electrical work, roofing and soffits (if required)
- Stage 5 – EWI installation
- Stage 6 – Loft installation and works required on extractor fans (if required)
- Stage 7 – Snagging
- Stage 8 – Completion/sign off
- Stage 9 – Aftercare visit and feedback.

WHAT THE WORK INVOLVES

All staff will carry ID. We do need some access to complete some of the preparation work. This includes plumbing, electrics and scaffolding and pre work assessments. They will make direct contact with you for future appointments that require access inside the property. There will also be other contractors working on this project who need access inside your home.

The weather and other unforeseen matters may stretch the work completion timescales as the work cannot be undertaken during extreme weathers and temperatures due to the materials used and type of job, but we will keep you updated.

Once the work has been done, an _____ surveyor will visit to check and sign off the works.

We will ask about your experience and satisfaction with the work done and how the process was for you.

Any side/rear gate may be upgraded so it works with the fittings required for the EWI. Iron gates are most likely to require replacing with timber gates. Please inform your Tenant Liaison Advisor (TLA) if you have any special adaptations on your current gate.

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WHAT YOU CAN DO TO HELP

Your understanding and preparation will help the work to be completed faster and limit any delays and disruption. We will do our best to limit this wherever possible, always remembering that our workplace is your home, and putting your welfare and safety first.

Please keep the area where the work is due to take place clear of all items and all access routes such as paths need to be clear.

When onsite we ask that you:

- Safely store any valuables, breakable, and personal items
- Remove wall mounted items, such as outside decorations, washing lines, hanging baskets
- Remove any non-wired lights that are your own and you want to keep
- Move or cover any furniture, plants and other items from working areas, to avoid dust or damage.

It is important to take appropriate precautions with furniture, personal belongings, and household content. ___ cannot accept responsibility for damage caused during the works.

It is recommended that you have buildings and contents insurance.

Your TLA will meet with you to explain the preparation work you are required to complete. They will also identify you or your households' specific needs, which will be taken into account during the completion of works.

Please contact your TLA if you have any physical or other difficulties with preparing the property for the EWI works.

FREQUENTLY ASKED QUESTIONS

Through our experience of completing similar works, we have some common questions other residents have asked. We hope they cover off any queries you have.

During the works:

How long will the works take to be completed?

It will take roughly 20 working days from the point when the EWI materials are fitted to your home to final completion of the installation. However this is weather dependent.

There will be pre works (highlighted on page 2) which will have started some weeks before the EWI installation.

Can you work during bad weather?

Render unfortunately cannot be applied in the rain as it may wash off, or in temperatures lower than 3˚C or higher than 30˚C. If we need to reschedule for this or any reason, your TLA will contact you about new dates.

Will there be loss of services?

During the works there may be times where you will experience temporary loss of services including gas and electricity. We will always confirm with you before and ensure you have arrangements in place.

Water supply

There should not be any interference with your water supply providing the tap feed has an isolation valve. If you do not have an isolation valve, the down time is approximately 30 minutes. Your TLA will inform you of any times where you may not be able to access your water supply to ensure this does not interfere with your day-to-day activities.

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FREQUENTLY ASKED QUESTIONS

Gas

During the works, there may be periods of time where your gas supply will have to be disconnected. The time period for this will vary and is property dependent. Your TLA will confirm with you any interference with your gas supply and will be in close contact should you have any issues.

Electricity

There may also be a period during the day that Western Power may need to do some outages during their works. Again, we will tell you before this happens.

Can I choose what colour the external wall insulation is on my property?

Unfortunately, not. The colour for your property will be chosen to fit with the rest within your area.

Will I need to stay in whilst the work is undertaken?

No, when we need to gain access to the property your TLA or other contractors will give you prior notice. We do need some access to complete some of the preparation work such as plumbing, electrics and scaffolding.

We are unable to work in homes where there are unaccompanied children under the age of 18.

Either you or someone that you've nominated (over the age of 18) will need to be present at the property while the internal work is being carried out. Alternatively, you can give ____ permission to fit a keysafe at the property. This will allow our team to continue with the works while you are not there.

Will the contractors need access to my water supply?

Yes, ____ will need access to water. If there is an outside tap to your property they will require access to this. If there is short supply, they may install a number of taps in the area.

FREQUENTLY ASKED QUESTIONS

Is scaffolding needed?

Yes, scaffolding will need to be erected and should not interfere with any adaptations or specific access areas you require. If you have any questions, please contact your TLA.

Will my TV still work during the works being undertaken?

Yes, we will complete a temporary fix whilst the work is being undertaken which may result in a loss of service for no more that one hour.

After the works:

Can I attach anything to the outside of my property following completion of the external wall insulation works?

Nothing should be attached to the exterior of the property as this could risk damage to the system. Anything that damages the installation increases the chances of water getting in and causing long-term problems.

Any damage to the system must be repaired immediately, so please contact your TLA if damage occurs.

Can I grow plants against the house?

Please keep garden soil levels as far below the system as possible – if you don't the soil will discolour the base of the render. Plants, trees and creepers can also cause staining of render finishes, so just plan carefully where to place them.

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FREQUENTLY ASKED QUESTIONS

Climbing plants, as long as they have the properly fixed trellis, will not cause any damage to the system, however some staining may be caused.

Are there any other general upkeep things to consider?

To keep your home looking its best, metal objects should be kept away from the insulated render system and not leaned up against your home. Rust staining can soon discolour the finish and damage the system, particularly on lightly coloured finishes.

Care should be taken when handling heavy objects, for example dustbins, near the render system. Although the system is resistant to damage, these types of objects particularly near corners can cause damage, which is visually undesirable although easily repairable.

What should I do if an overflow pipe or guttering is leaking?

During the works if any issues arise call your TLA. If the leak occurs a while after the works have been completed, please call Customer Services to raise an order for a repair to the guttering/overflow as soon as possible. Drips and splashes from overflows, leaking gutters and down-pipes can soon mark and spoil the render finish. Such leaks should be repaired as soon as possible to prevent water staining.

What should I do if there are any dust marks or minor aesthetically damaged areas?

Mild soapy water may remove small areas of cement dust, soil, scuff marks etc., however sometimes it can worsen the problem. Make sure you do a small test first on a small area.

Will there be any work needed after the external wall insulation has been completed?

Yes, loft insulation will be installed following the completion of the external wall insulation works. This is to ensure that the property is fully insulated.

NEXT STEPS

We look forward to working with you and to helping you keep your home warm and well.

For your complete peace of mind, your TLA, ____ will be available to answer any questions before and while the work is taking place. We will answer your concerns and cater for special needs relating to the work.

She will be onsite during some of the works but if it's urgent, she can also be contacted on:

T.

E.

___ is your primary contact but for support we are providing two secondary contacts:

_____

Out of hours contact number:

Stage 2 Installation

Key Aspects - What is important and why?

The installation phase of a domestic retrofit programme has significant importance for tenants due to several key factors. Firstly, it brings significant disruption to their daily lives, including noise, dust, and interruptions to utilities, impacting comfort and liveability within the property (Morgan et al., 2024). Additionally, tenants may express concerns about access and privacy, fearing compromised security and intrusion during this phase. Safety is also a significant consideration, with tenants worried about potential hazards arising from structural changes or equipment installations. Throughout this phase, clear communication and support from landlords, contractors and tenant liaison officers are essential to address tenants' concerns, provide necessary information, and maintain a sense of security.

Key questions to answer

The following questions are important for residents to have answered at the installation stage of a retrofit project as this is the stage that causes the most disruption and intrusion. Having the responses communicated as early as possible, in a transparent manner, prevents drop-out and frustration.

What types of energy-efficient improvements are recommended for a specific home, and why?

The recommended improvements depend on the home's unique characteristics and the findings of the assessments. Suggested measures such as insulation, heating system upgrades, and ventilation improvements enhance energy efficiency and comfort. **Organisation to add more specifics to provide a tailored response to this question.**

How will any potential structural or building fabric issues that may arise during the retrofit be assessed?

Structural or fabric issues will be addressed in accordance with PAS 2035 standards. This may involve structural repairs or modifications to ensure the successful implementation of energy-efficient measures. **Organisation to add more specifics to provide a tailored response to this question.**

What steps will you take to ensure the retrofit work minimises disruption to daily life?

Planning the work ahead of time to minimise disruptions as much as possible, including scheduling and taking steps to ensure comfort during the retrofit process. **Organisation to add more specifics to provide a tailored response to this question.**

How will you handle the disposal of any waste or materials removed during the retrofit process?

The disposal of waste and removed materials will take place responsibly, following local regulations and environmental best practices. **Organisation to add more specifics to provide a tailored response to this question.**

Can you provide a timeline for the retrofit project, including key milestones and completion dates?

Organisation to add more specifics to provide a tailored response to this question. Suggested response: Yes, we will provide you with a detailed timeline that outlines key milestones and completion dates for each phase of the retrofit project. This will help you understand when each step will occur, from assessments to installation and project completion, and plan ahead.

What type of warranty or guarantee do you offer for the retrofit work and materials used?

Organisation to provide a tailored response to this question.

Do you work with certified and accredited professionals, such as energy assessors, architects, and engineers?

PAS 2035 requires that retrofit professionals are suitably qualified and accredited by the relevant bodies[5]. **Organisation to provide a tailored response to this question**

How will you help understanding and maintenance of the energy-efficient features and systems installed in homes after the retrofit?

Provide guidance and information that includes user manuals, maintenance schedules, and advice on best practices in easy-to-understand language and with illustrations as much as possible. **Organisation to add more specifics to provide a tailored response to this question.**

Key restrictions for client (PRP/LA) and resident

During the installation stage of retrofitting a home, the PRP/LA needs to work within the following key restrictions:

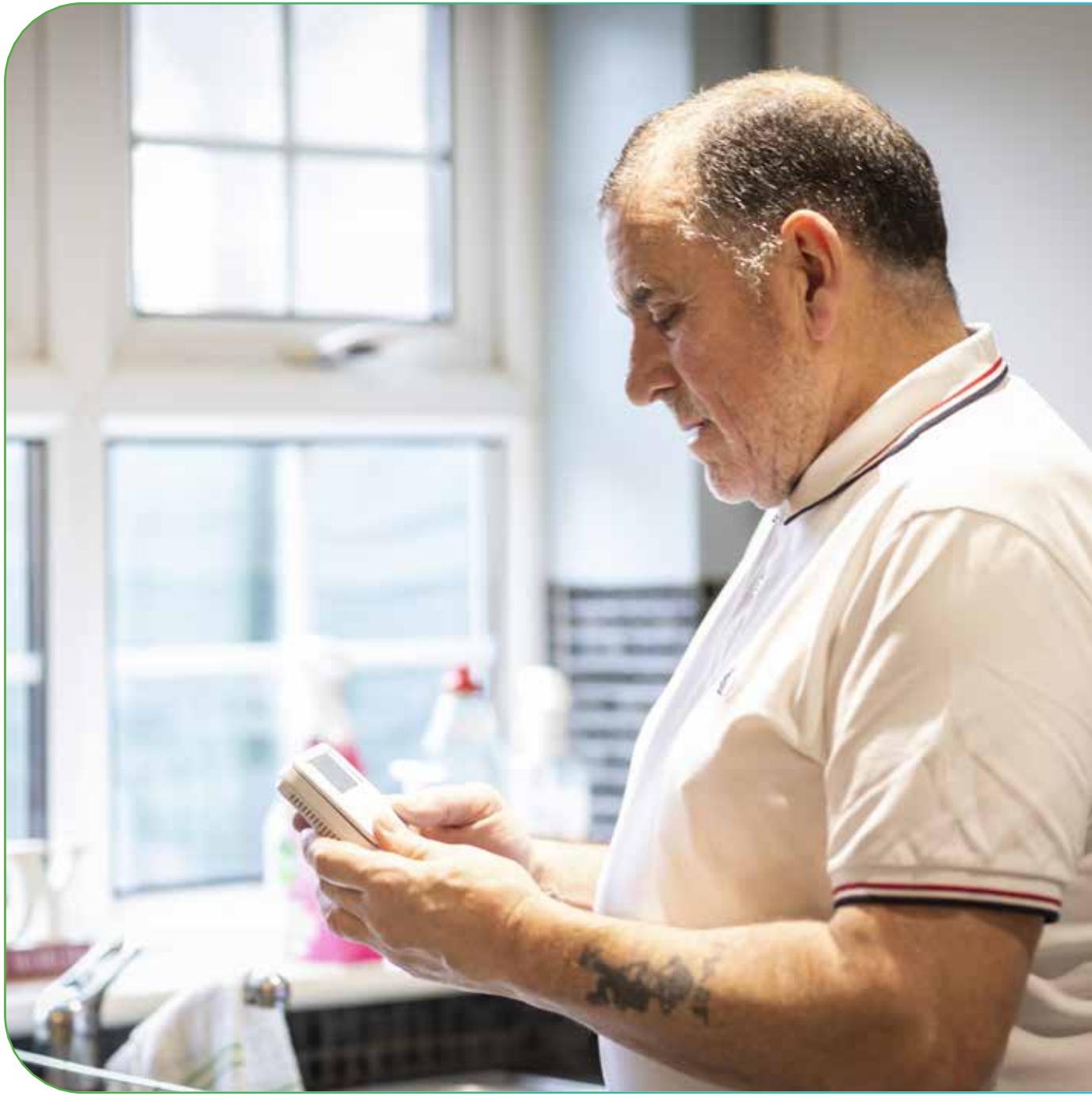
- Provide accurate and complete information about the property as inadequate information can lead to poor retrofit solutions and compromise the retrofit evaluation.

[5] BSI. (2023b). PAS 2035:2023, *Retrofitting dwellings for improved energy efficiency – Specification and guidance*. BSI Standards Limited (Annex A (normative) Qualifications, page 33)

- Secure funding and grants if applicable as delays in securing funding can hinder project progress.
- Ensure compliance with PAS 2035.
- Ensure retrofit professionals are accredited.

The installation stage of retrofitting is the most intrusive to the resident who is faced with challenges and restrictions that affect their schedule, routine and livelihood as a whole. The following are examples of restrictive elements:

- Complaints from neighbours for noise levels, car access, pavement access etc.
- Medical concerns from intolerance or reactions to construction materials, chemicals, and dust.
- Annoyance or anxiety due to installers and contractors working within the home as well as the surrounding grounds.
- Communication challenges and misinformation.



Best practice tips – timeline

The following presents a best practice approach of an example timeline for surveys and installation.

Working with project partners and contractors bring together relevant information to develop a 'customer journey' outline – this provides clarity as to how long the process will take from sign up to installation.

It also identifies which project partner will complete each stage, so residents are not surprised when a particular contractor calls, rather than the initial person of contact from the engagement team.

This sets residents' expectations of the project and cuts down the number of calls/emails received from residents wondering what the next step is and making cancellations.

What follows is an example of what a timeline can include (note that durations should be edited to suit project specific timelines – the following are only indicative and noted in italics):

- EPC Assessment (if these are prior to, and separate from the Retrofit Assessment)

  (Completed *3-5 days* after registration on to the scheme)

- Retrofit Survey (the Retrofit Assessment)

  (Completed within *1 week* of EPC)

- Technical Survey[s] – i.e., Contractor's Surveyor

  (Completed within *2 week*s of Retrofit Survey)

EPC Assessment: This step involves an assessment by the Domestic Energy Assessor. The Energy Assessor assesses the energy performance of the property and identifies potential areas for improvement.

Retrofit Assessment: The Retrofit Assessor conducts a Retrofit Assessment, which ideally takes place within 1 week of the EPC assessment. This survey is essential for gathering detailed information about the property's current condition and identifying specific retrofit measures needed.

Technical Survey[s]: The Technical Survey is carried out by a Contractor's Surveyor and is typically completed within 2 weeks of the Retrofit Survey. The former focuses on the technical aspects of the retrofit, such as the structural and engineering requirements, and helps in developing a detailed retrofit plan. More than one technical survey may be required.

Installation Process: Once the Technical Survey is complete, the actual retrofit installation process can begin. The installation process can vary in duration based on the scope and complexity of the retrofit work, but typically, it includes the following steps:

Preparation: The site is prepared for retrofit work. This may involve clearing the area, ensuring safety measures are in place, and securing necessary permits. This may also include preparatory works, such as resolving damp, repointing or roof strengthening.

Installation of Retrofit Measures: Contractors or installers, as per the approved retrofit plan, begin the installation of energy-efficient measures. This may include insulation, heating system upgrades, ventilation improvements, and more.

Quality Control and Inspections: Throughout the installation process, there may be various quality control checks and inspections to ensure that the work is carried out to a high standard and in compliance with PAS 2035.

Final Assessment: After the retrofit measures are installed, a final assessment may be conducted to verify that the improvements meet the intended energy efficiency and performance goals.

Completion and Handover: Once the retrofit installation is finished and verified, the project is completed, and the homeowner receives documentation and information about the energy-efficient upgrades made to their home.

The specific timeline for the installation process can vary based on the scale, complexity, availability of assessors and surveyors and any unforeseen delays of the project. This overview of the timeline ensures tenants have a clear understanding of the stages in their retrofit project from initial assessment to the completion of the retrofit work, including who will be responsible for each step, thereby reducing client inquiries and cancellations due to uncertainty. It also ensures that the retrofit work is well-planned and complies with PAS 2035 standards.

Stage 3 Handover

Key Aspects - What is important and why?

When handing over the completed properties to the landlords and tenants it is important to ensure there is a smooth transition and any problems are solved quickly and equitably. This section discusses key aspects to consider but also acts as a best practice guide for the important handover stage of a retrofit project.

Identify who is leading the handover

Before the handover, the client (PRP/LA) must determine whether the handover should be undertaken by the contractors themselves or whether to employ suitably trained advisors to run the handover.

Identify what the handover will entail

The handover can either be done in person via demonstrations and Question and Answer (Q & A) sessions. Alternatively, residents can be provided with documentation detailing the benefits of the upgrades with an explanation of how to use or maintain them. Whilst just using documentation as a handover might be seen as more resource efficient, a more successful handover is usually achieved by having an in-person handover followed by accessible documentation for residents to refer to.

It is important that the contents of the handover are decided before it goes ahead. It is also important that a handover checklist is made for each individual property, and an overall checklist of all properties. This ensures that the handover is carried out in a methodical manner and each property receives the same level of attention.

Identify who will be dealing with queries

It is important that a single point of contact (SPOC) be established. Then any issues raised by tenants can be directed to the correct channels more effectively. Examples of a SPOC could include landlords or Tenant Liaison Officers.

Ensure good communication

The provider should be pro-active in ensuring that good communication with tenants is upheld throughout the process. Communications and any other materials should consider language barriers, different comprehension levels, disabilities and different communication methods. Ensure that the documentation provided answers any potential questions (i.e., what happens if something goes wrong with the improvements to my house?). Any issues that arise should be reported to the SPOC. Most contracts will have a designated snagging period in which the contractor is responsible for remedying any snagging issues. It should be discussed how any issues will be managed once this snagging period is over.

Decide what behaviour changes should be encouraged

Once the measures have been installed, consider whether any changes to tenant behaviour are needed and plan for tenants receiving corresponding advice (i.e., for HP installation advice tenants to run the HP throughout the day rather than a couple hours in the morning and evening as they would a boiler). These behaviour choices can help achieve the retrofit targets for the home, but also Local Authority energy efficiency targets.

Key questions to answer

What is a handover?

A handover is the final stage of the retrofit project, where the resident received information and if needed training on how to use the newly installed measures to suit their lifestyle, comfort levels and indoor habits. Handovers should be scheduled to be accessible to all tenants, this includes scheduling multiple sessions to accommodate, for example, different working patterns.

Will behaviour changes be advised?

Depending on the retrofit measures selected, their interaction and the systems they are replacing, resident behaviour changes may be required. The Retrofit Coordinator is in the position to determine whether such changes are needed and to point to the most suitable professional to provide this advice.

Who will help me understand what has been done to my property?

The designated SPOC or a suitably trained technology champion will be ideal for providing follow up information on handover matters.

What is an evaluation and why is it needed?

An evaluation is the part of the retrofit project that determines whether the measures installed achieved the results that were expected at the planning and design stage of the project. The results are based on a questionnaire completed by the residents to understand among others whether they are satisfied with the new measures and whether they have questions regarding the use and maintenance of the measures. The evaluation is important because it can provide insight on what works and doesn't work, it can identify any unintended issues before they become problems and it can also identify ways to optimise the use and interoperability of measures to achieve optimum results such as reduce energy bills to the maximum amount possible. Measurements might be taken if they have been built in to the evaluation plan, or if the 'Basic' evaluation indicates that further evaluation is required.

How many times will I be contacted after the works have finished?

Once the initial handover has been completed, follow up sessions should be booked in with each tenant, so any issues that arise can be dealt with. The recommended time frame for scheduling these check-ins is: 3 months, 6 months, and 12 months. It is important to schedule one right after the dwelling has gone through the first heating season.

Key restrictions for client (PRP/LA) and resident

During the handover and evaluation stage of retrofitting a home the (PRP/LA) needs to work within the following key restrictions:

- **Dissatisfied tenants who could potentially become a risk to the PRP/LA's reputation.** Appointing a SPOC facilitates early detection of any issues and directing them to the most suitable route for efficient and early rectification by the appropriate retrofit professionals.
- **Not achieving the project outcomes.** Contingencies for such an event can be factored into the project, however, the (PRP/LA) should maintain transparency and communicate any project issues to all parties as soon as possible for expectations to be adjusted.
- **Tenants not using the installed measures as expected.** A robust handover procedure can mitigate this and can include having contractors show tenants how to properly use technologies, having community technology demonstrations and appointing 'technology champions' to show other members of the community how the measures work and can be used for optimum results and comfort. Moreover, accessible instructions in the form of a handover pack should be provided to all tenants for reference.
- **Detrimental impacts to property by accidental damage.** In this case measures should be undertaken to ensure these damages have minimal impact to the project. A thorough snagging process should be undertaken once the works are completed to report any detrimental impacts to the property and how these can be rectified.

During the handover and evaluation stage of retrofitting a home the resident may face the following restrictive elements:

- **Lack of information from installers, evaluators, and coordinators.** Communication between installers, evaluators, and coordinators should be open and clear during the retrofit process. Assigning a Single Point of Contact (SPOC) can facilitate smooth communication with tenants in both directions.
- **Fitting handover and evaluation into everyday life.** The retrofit team should always be considerate of residents' time, especially when teaching them how to use and maintain the new measures.
- Difficulties and anxiety associated with adapting to new technologies. Once more, having someone like a SPOC or technology champion available for residents to ask questions and learn from can boost their confidence in using new technology.

- Unintended problems can arise from improper use or faulty installation of measures, such as dampness and mould due to inadequate ventilation in a well-insulated home or water ingress in the insulation. It's important to address these issues promptly through the SPOC to prevent them from worsening and affecting occupants' health and wellbeing.

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Templates

What is retrofit?

What is it?

'Retrofit' quite simply means making improvements to a building to reduce its energy use. The term used for this type of improvements is 'energy efficiency improvements'. Because the whole building (for example, walls, heating system, householders etc.) is considered when planning which energy efficiency improvements are most suitable to a particular building-retrofit is known to take a 'whole house approach'. Retrofit is not the same as renovation or refurbishment, which often 'makes good', repairs, or enhances the look of a building but doesn't necessarily reduce its energy use.

Why do we need it?

The UK government has pledged to reduce all greenhouse gas emissions to net zero by 2050. Around a quarter of these emissions come from the UK's 27 million homes, so improving their energy efficiency is a vital step towards achieving this target.

Previously householders improved their properties depending on what funding was available. It could have been loft insulation one year, a new boiler in another, or more recently solar panels or an air source heat pump. But these may not be the appropriate measures for your property, or they may be the right measures, but installed in the wrong order. Or in the worst case they may be installed badly, making the property even worse than before.

In response to this, the UK government published the Each Home Counts review in 2016 which called for the establishment of an industry-wide Code of Practice. This resulted in a universally recognised quality mark called Trustmark, and the best practice guide called PAS 2035. Both these require funding schemes and contractors to install energy efficiency measures with a more householder-focused approach.

How does it work?

The process starts with a Retrofit Assessment, and this is a requirement when any publicly funded energy efficiency improvement is made. The whole process from assessment to installation is overseen by a Retrofit Coordinator who ensures the right measures are installed in the right order. A Retrofit Assessment is an in-depth survey of your home and takes between one and two hours.

It includes:

- an Energy Performance Certificate (EPC) survey
- an assessment of any current energy efficiency measures
- a condition survey
- a ventilation survey
- a heritage significance survey for older properties
- advice on the retrofit process

- proposals for appropriate energy efficiency improvements.
- intended outcomes agreements with the householder

What is a Fabric First approach?

The fabric of a building is all the structural parts that separate the inside from the outside – roof, walls, floor, doors, and windows. Improvements to these parts usually have a longer lifespan than heating systems, and they also reduce the required capacity and cost of the heating system. The most technically sound and usually cost-effective approach is to improve the fabric and implement the low-cost and easy-to-install measures first. This prioritises improvements in five stages:

1. Repair obvious defects such as water penetration, damp and poor pointing of masonry.
2. Do the easy, low-cost improvements such as, energy efficient lighting, basic heating controls, hot water cylinder insulation, draughtproofing doors and windows.
3. Improve the building fabric with insulation to reduce heat losses.
4. Control the reduced heat requirement as efficiently as possible using efficient heating technology and responsive controls.
5. Use Low/Zero Carbon (LZC) renewable energy technologies to reduce emissions further.

What does Build Tight, Ventilate Right mean?

When we insulate and draughtproof a house it is very important to include ventilation. Lack of heating and poor ventilation may cause damp and mould which can lead to health problems and damage to the property. Moisture can build up from bathing, cooking, drying laundry and even breathing. There must be a system to expel this moist air and input fresh air to the living spaces. The Retrofit Coordinator will review the ventilation survey and suggest a suitable ventilation system to maintain good internal air quality.

What if I can't do it all now?

Retrofit is rooted in the real world. It recognises that not all improvements can be made in one go, so the Retrofit Coordinator prepares a Medium-Term Improvement Plan. This is a guide for the improvement of a home in different phases over time. It identifies what improvements are needed, what order they should be done and how improvements might interact with each other. The Medium-Term Improvement Plan can be updated to respond to changes in standards or the availability of new technologies and to record improvements as they are made.

Marketing Plan

Date	Activity/ Channel	Message	Audience	Owner	Complete
Month 1 20__					
_ _ / _ _ / _ _	Internal communication	Information on SHDF scheme (eligibility criteria, aim & objectives)	All colleagues, local councillors, and neighbourhood officers		
_ _ / _ _ / _ _	New email inbox	Set up new centralised email address to field customer queries. Monitored by **[enter staff name]**	Customers		
_ _ / _ _ / _ _	Letters to customers	Properties in identified areas, identified archetype etc. Send identifying household letter & marketing flyer	Targeted public		
Month 2 20__					
_ _ / _ _ / _ _	Letters to customers	Household identified as suitable can be sent eligibility evidence form	Targeted customers		
_ _ / _ _ / _ _	News article	Project overview & announce that applications are open Visit **[enter web address]** for more info	Public		
_ _ / _ _ / _ _	Phone calls	Calling to familiarise targeted customers with household identification application	Targeted public		

Date	Activity/ Channel	Message	Audience	Owner	Complete
_ _ / _ _ / _ _	Door knocking	To familiarise targeted customers with household identification application Flyer drop	Targeted public		
Month 3 20_ _					
_ _ / _ _ / _ _					
Month 4 20_ _					
_ _ / _ _ / _ _					

Initial contact cover letter

Address
Date

Dear Resident,

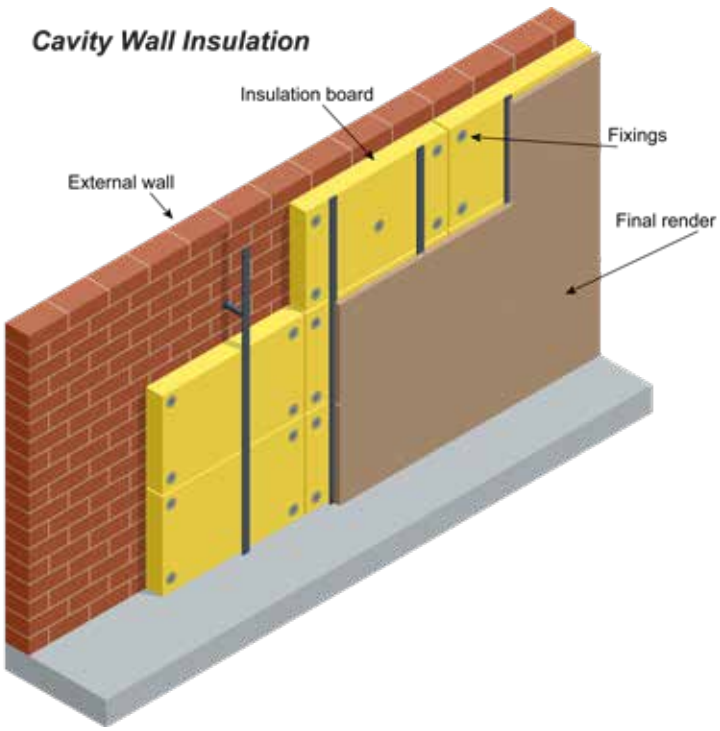
(Enter organisation name) is working on an exciting proposal to improve your home's energy efficiency. This scheme is called the **(enter scheme name)** and is funded by the Government's Department for Energy Security and Net Zero. As the scheme is funded it will come at no cost to you, the resident.

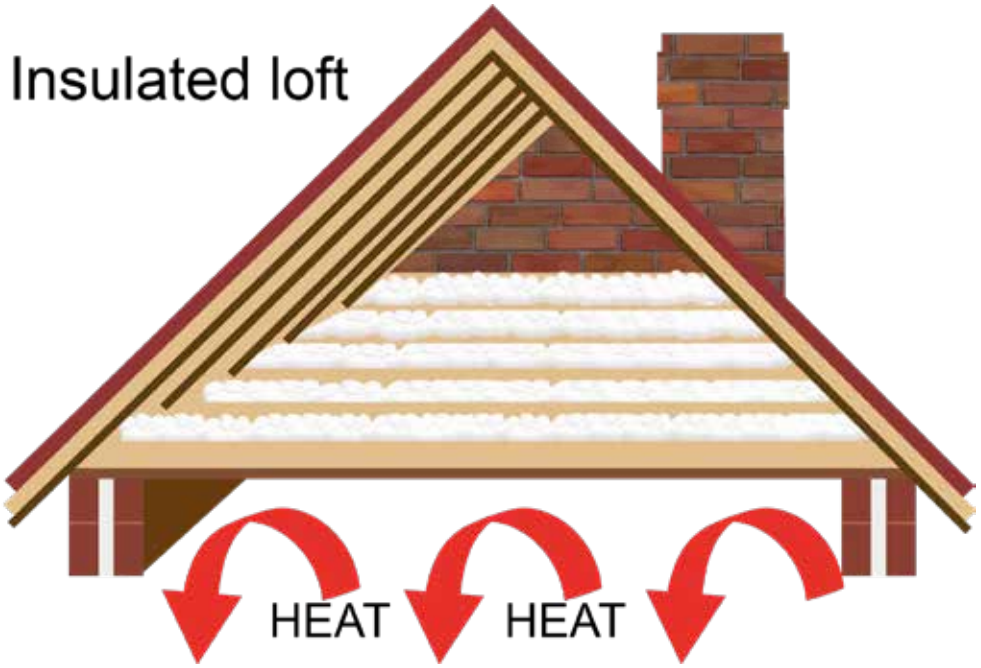
What's in it for you?

(Enter organisation name) has secured funding to help households improve their energy efficiency. This will help reduce your CO_2 emissions and save you money on energy bills. There are many different ways to improve a home's energy efficiency, and every property that qualifies to participate will be assessed so the most suitable improvements are made. Examples of improvements are cavity wall insulation, external wall insulation, loft insulation, double glazing, solar panels, heat pumps, and internal wall insulation.

The following page shows an overview of the steps involved in taking part in the scheme if your home is found to be suitable for participation.

Examples of energy saving installations





How to take part

If you are interested in taking part, please complete the questionnaire (Identifying Household Questionnaire) included with this letter.

This will give us more information about your home and the people who live in it. It will also help us find out whether your home is eligible for the scheme.

You can return the completed questionnaire to us by post at **(enter organisation address)**. Alternatively, you can visit **(enter web address)** or email us at **(enter email address)**.

If you would like any help to complete this questionnaire, please call us on **(enter phone number)** and we can fill it out for you while we discuss each question with you on the phone. The questionnaire information will be treated in the strictest confidence and no personal information will be shared with anybody outside the scheme or used for any other purpose than to help us deliver the improvements to your home. We will contact you by **(enter communications channel)** before **(enter the date)** about whether your home is found suitable to participate in the scheme.

Yours faithfully,

Name
Job Title & Organisation

Identifying household questionnaire

Personal Details					
Title		Name			
Address				Postcode	
Date of Birth		Contact No.			
Email Address					

Household Details					
No. of Adults (Aged 65+)		No. of Adults (Aged 18-64)			
No. of Children (Aged 12-17)		No. of Children (Aged 5-11)			
No. of Children (Aged 0-4)		No. of bedrooms			
Tenure - e.g., owner, social housing, private rented etc.		Year moved to property		Property age	
Social housing provider (if applicable)		Building type – e.g., detached, flat, terraced			

Home Comfort Details			
Is your home warm enough in winter?		Is your home too warm in summer?	
Do you get any condensation?		Do you get any mould?	
If yes to mould, what rooms and location in those rooms?			
Do you open windows in winter?		How many hours per day do you have your heating on?	

Do you have a thermostat?		What temperature is your thermostat set to?	
Do you heat the whole home or just certain rooms?		How many layers do you tend to wear on a typical winter day in your home?	

Heating System Details			
What fuel does your heating use?		Who is your energy provider?	
If you know your tariff name, please state		How do you pay for your energy bill? e.g., direct debit, pre-paid meter	
How old is the heating system?			
How much are you paying for your energy each month?	Summer		
	Winter		
How much energy do you each month?	Summer		
	Winter		

Appliance Details			
What fuel do you use for cooking?		What size is your cooker? e.g., normal 4 ring hob, range > 4 rings	
Approx. number of household showers per week		Approx. number of household baths per week	
How do you heat your hot water?		How often do you use a tumble dryer?	
No. of fridges and freezers		Is this a fridge-freezer or separate stand alone?	

Health and Wellbeing Details				
Does anyone in the household have a chronic health condition?				
If so, what form does this take?				
Is this affected by the cold or damp?				
Is there anything else in your home that affects your physical or mental health condition?				

Information sharing				
This questionnaire information will be treated in the strictest confidence and no personal information will be shared with anybody outside the scheme or used for any other purpose than to help us deliver the improvements to your home.				
Do you consent to this information being shared with organisations with the scheme?	Yes		No	

Phone call script identifying household questionnaire

Hi Mr/Miss **[contact's name]** my name is **[your name]** and I'm calling from **[organisation name]** on behalf of **[organisation running retrofit]** about the **[name of funding scheme]** scheme.

We sent you a letter recently about this government funded scheme that helps improve the energy efficiency and comfort of homes.

Some of the carbon benefits are:

[List carbon benefit 1]

[List carbon benefit 2]

[List carbon benefit 3]

Thank you for registering your interest in the scheme, so that your home is considered as one of the homes that could be selected for improvements as part of this scheme.

The next step is to complete a questionnaire with you over the phone, this will help us determine if your home is suitable for the scheme - it will only take **[x]** minutes' then... we'll move onto the next steps of the process.

Are you happy with everything I've said so far?

Are you ready to answer the first question?

Carry on and complete the 'Identifying Household Questionnaire'

Questionnaire troubleshooting:

- Questions regarding the questionnaire?
- Application?
- Scheme?

Promotional materials tips

Using co-benefits can help engage a wide audience.

If using imagery, reflect your audience's diversity, including age, ethnicity, gender identity, etc.

Offer a variety of ways for people to contact, including non-digital options.

Follow brand guidelines for logo placement, but ensure there is spacing around it.

Bullet points are easy to scan, so include for lists.

Follow your company's brand guidelines to ensure your assets are recognisable and consistent.

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Promotional materials tips

Make sure your assets aren't overcrowded.

If you don't have access to photographs, graphics can be used to illustrate your assets.

Make your copy about the person reading by using 'you' where possible.

Testimonials can be used to help build trust. Where possible, use names rather than anonymised quotes.

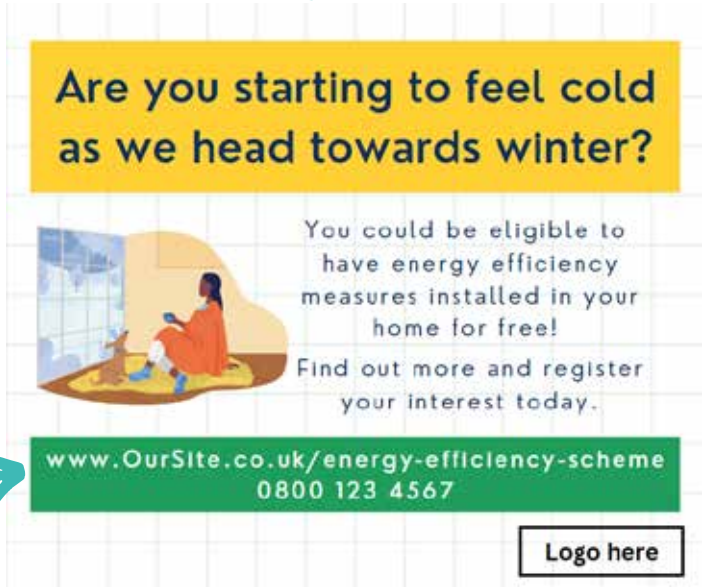
QR codes can be an easy way for people to access your website.

Promotional materials tips

Make sure your assets are consistent across the different channels you use.

If posting on your own social media channels, you may not need to include your logo. But if assets are being shared with partners, including one is helpful.

Questions can help to catch the attention of people scrolling on social media.



Try to keep URLs short so that they are easy to type in.

Adding animation to your social media graphics can help them to stand out.

Test different messaging on social media graphics to find out what works for your audiences.

Client information pack notes (measure mix and FAQs)

Clearly and concisely outline the measure mix. List the home energy improvements to be received – each to be accompanied with a relevant image and, if applicable, before and after images too – this is particularly effective in the installation of EWI. Include a short description as to what each energy improvement is, what it does and most importantly, how it will benefit tenants i.e., the potential financial savings that can be achieved, carbon savings, plus any notable wellbeing benefits.

Highlight why the home is suitable for these measures to broaden resident understanding i.e., if their home has solid brick walls the most effective way is to insulate them with solid wall insulation – they are not suitable for cavity wall insulation as there are not two layers of brick so insulation can simply not be blown into the gap.

Provide a comprehensive list of FAQs, looking to dispel any myths and inform clients about items, such as where the grant funding originated from, information about the warranty, level of disruption, whether any maintenance is required once the install is complete etc.

FAQs tend to be quite fluid; can be added to as the project progresses. This may result in issuing a revised version of the FAQs halfway through the customer journey if the same question is asked multiple times.

First phone call script notes

The opening line is usually “My name is **[enter name]**, calling on behalf of **[enter housing provider]**, with regard to the energy efficiency measures that are planned for your house.”

It is important to get the name of the housing association into the opening line to avoid suspicions of a sales call.

Mention this is a follow-up call to the letter that was sent a while ago outlining the proposed measures, to see if you received the letter and have any questions or concerns. Also mention the purpose of the measures are to 1: make the house warmer and cheaper to run, and 2: reduce carbon emissions; and how this will be achieved (i.e. by insulation and a new heating system such as air source heat pump). You may or may not have specific information about the property and plans may change in the future, so don’t be too specific, although other measures (i.e. new doors & windows or an improved ventilation system) are also important when improving insulation and airtightness.

Regarding timescales, inform the resident the next step will be the installation of a digital thermostat that works in exactly the same way any present one does, but will collect temperature and humidity information before and after the work, to ensure the measures are doing their job properly. Also mention that works will take place later this year as contractors are currently being selected and the duration of works, including any scaffolding.

It is important to inform the residents whether they will need to move out or not and to ask about any specific accessibility issues/requirements.

Inform the resident: where their belongings will be stored (i.e., loft or lean-to shed), who will assist them in removing them, provide alternative storage space and discourage returning the belongings to the loft space due to potential danger and compromising the insulation. At this point any anecdotal information the resident shares about present problems (i.e., condensation, mould, draughts etc.) is very useful.

Moving on to the work completion stage, mention the pattern of energy use is likely to change for the better and as a result, the resident may need to change their tariff or supplier, which independent energy advice charities (CJSs) can help with when the time comes. It is useful here to find out roughly how much the residents spend per month on energy and who their energy supplier is, as comparison of before-and-after energy spend is useful for gauging the success of the project.

Finally, it is important to log the details of the call on a spreadsheet shared across the team indicating the specific resident’s level of enthusiasm or antipathy toward the project.

Retrofit Assessment Notification Letter

Name
Address
Date

Dear Resident,

[Organisation name] would like to thank you for completing the eligibility application for the **[retrofit scheme name]** scheme. We have checked the evidence you provided and are now able to complete an energy efficiency survey on your home.

What is a Retrofit Assessment (RFA)?

An RFA is a PAS 2035 requirement for your property to participate in the scheme you have applied for. PAS 2035 is a national framework to ensure energy efficiency works are installed professionally, safely and to the highest standards.

You may already have had an Energy Performance Certificate (EPC) carried out for your property. A RFA is an energy efficiency survey similar to that for an EPC, but is much more detailed, tailored to your property and a requirement of government grant funding.

What does the work involve?

Your property will be assessed on which energy efficiency improvements are best suited to your home and may include some of the following measures:

- Cavity or external wall insulation
- Loft insulation
- Suspended floor insulation
- Internal wall insulation
- New windows and doors
- Solar panels
- Ventilation system
- Heating system including new customer friendly programmer

What do I need to prepare?

The RFA is conducted by a Retrofit Assessor who will ask a series of questions about your energy usage. It will be useful for you to have your electricity bills and other fuel bills/invoices from the last 12 months handy so that your answers can be as accurate as possible.

Please note that having an RFA at this stage of the grant process does not guarantee grant funded works for your property, nor does it mean that you are required to proceed with works. Before any grant is offered, you will have the option to review all works proposed.

What are the different stages?

The following are the various delivery stages undertaken for the energy efficiency measures to be implemented:

- **[enter name of housing provider]** will contact you to advise and provide support throughout the whole process
- RFA completed to decide what energy efficiency improvements need to be made
- **[Possible installation of a 'smart' thermostat to calculate current energy usage]**
- Complete the Home Energy Diary (attached)
- Confirmation with you of the energy efficiency works suitable for your property
- Installation of the energy efficiency works

After the RFA, surveys carried out by installers may involve checks of current insulation levels. For example, if your property has cavity walls, what is called a 'borescope check' may be required to ensure that the property has the necessary levels of cavity wall insulation.

We have appointed the independent Energy Advisor, **[enter name of energy advisor]**, to assist and support you throughout the whole process, and make sure you are comfortable with each stage of the delivery process.

If your property is selected to participate in the scheme, the first thing to happen will be the installation of a smart thermostat called a **[enter name of monitoring technology]**. This works like a normal thermostat but also learns your heating routine and how long your home takes to warm up and cool down. It will help you reduce energy waste and save money; it helps **[enter name of housing provider]** to assess which energy efficiency improvements are best suited to your home, and after these are installed, it will help ensure they work correctly.

Yours faithfully,

Name
Job title
Organisation

All the information you provide in the diary will be extremely useful. You don't need to complete it every day, or for the whole week (although this would be hugely helpful). Any data you're able to provide without taking up too much of your time, will be sufficient.

All people visiting your property throughout the programme (the delivery team) will be wearing an identification badge. If you are unsure about letting anybody into your home, please ask them to wait outside and give us a call. We will be happy to verify their identity for you.

We will share your name, address, and telephone numbers with the delivery team for the sole purpose of this project. Your contact details will be deleted by them upon completion of the contract.

Thank you in advance for your co-operation and providing access to your home.

Yours faithfully,

Name
Job title
Organisation

Home Energy Diary (BEFORE installation)				Week commencing: _____
Day	Time of day (note time if possible)	Indoor temp.	Is the heating on?	Comments: How do you feel? What's the weather like? Are you worried about using energy? Any other thoughts?
Monday	Morning			
	Afternoon			
	Evening			
Tuesday	Morning			
	Afternoon			
	Evening			
Wednesday	Morning			
	Afternoon			
	Evening			
Thursday	Morning			
	Afternoon			
	Evening			
Friday	Morning			
	Afternoon			
	Evening			
Saturday	Morning			
	Afternoon			
	Evening			
Sunday	Morning			
	Afternoon			
	Evening			

Works to start letter

Address

Date

Dear Resident,

Now that we have completed all checks on your property, and a Retrofit Assessor has advised what improvements need to be made to your home, we have booked for works to begin.

The Retrofit Assessor has advised us that the below improvements are best suited to your property:

[List recommended retrofit measures]

We have provided an information pack with this letter which covers a variety of common questions as well as a guide of the full retrofit process.

These works are planned to start the week commencing [enter start date] and will take approximately [enter duration] weeks to complete.

Some things you need to do before work starts

For us to carry out the works safely we will need to erect scaffolding around your property. Please remove any personal belongings, garden furniture or plant pots etc from around your property. The scaffolding will be erected in accordance with safety regulations and will be regularly checked by our site team. Whilst works are being carried out, please do not let anyone tamper or utilise the scaffolding for any purpose. Please note our operatives will not be working on your property every day during this period. The weather can govern some of our works. You will be kept informed by a member of the site team of any delays.

With all work there will be a certain level of disruption

Due to the nature of the works and power tools used a certain amount of noise and dust is inevitable and we recommend you keep all windows and doors closed when possible. As the works proceed there will also be waste materials left around your property which will be cleared as soon as possible.

Please be aware of any warning signs around your property, and take extra care when entering and leaving. If your property has a gate, we may have to remove this where needed and refit once the works are complete. This will be of no cost to you. Please be aware the gate will be removed for the duration of the works.

If you have any concerns as to the authenticity of any of our employees or you would like to discuss any details of this letter or require any assistance, please contact **[enter point of contact name]** or you can email **[enter contact email address]**.

Yours faithfully,

Name

Job title

Organisation

What does retrofit mean?

An RFA is a PAS 2035 requirement for your property to participate in the scheme you have applied for. PAS 2035 is a national framework to ensure energy efficiency works are installed professionally, safely and to the highest standards.

You may have already had an Energy Performance Certificate (EPC) carried out for your property. An RFA is an energy efficiency survey similar to that for an EPC, but is much more detailed, tailored to your property and a requirement of government grant funding.

What is an Energy Performance Certificate (EPC)?

An EPC rates your property's energy efficiency, based on data gathered by an EPC assessor and then entered into a software that generates the rating.

In order to potentially qualify for the **[enter name of funded scheme]** scheme, the EPC for your property must be a **[enter EPC funding criteria]**. If it is an **[enter scheme ineligibility criteria]** your property will not qualify. Please note that if your property is a D rated property, the government has specified that only a certain number of these may qualify for the funding and so you may not qualify. All final decisions are made by the relevant housing provider. An EPC with an A rating indicates high energy efficiency for the property, while a G rating signifies a property with very low energy efficiency.

Do I have to pay for anything?

No. The government has awarded £**[enter amount of funding]** million to local authorities across the country to retrofit social homes. In the **[enter local area]** area, **[enter organisation name]** is working with the Council to retrofit approximately **[enter number of homes]** social houses.

What is a Smart thermostat?

A Smart thermostat, or **[enter specific technology name]** is a digital thermostat that works in exactly the same way as a normal thermostat, allowing you to control your central heating and hot water. It also monitors indoor temperature and humidity to help resolve any problems in the house and make sure the new energy efficiency improvements are doing their job properly.

What energy efficiency improvements will I get?

The energy efficiency improvements that are installed in your home depends on the RFA survey. Improvements may include:

- external wall insulation
- loft and floor insulation
- new doors and windows
- a new heating system (such as an Air Source Heat Pump)
- a ventilation system.

Who is doing the work?

The project manager is **[enter project manager name]** and they will be working with a variety of specialist contractors to do the work. **[enter customer support organisation]** is a local energy efficiency charity, and are here to answer your questions and provide ongoing support before, during and after the installation. They can help you find the best energy supplier and tariff after the work is completed.

Will I have to move out?

The work will inevitably cause some disruption, but it should not be necessary to move out.

What is external wall insulation?

Older style properties with solid walls (i.e., those without a cavity) lose a lot of heat through the walls. Cladding the outside walls with a layer of insulation can reduce this heat loss through the wall by around 25%-45% depending on factors such as the thickness and quality of the insulation, the type of wall construction, and the climate.

External wall insulation is a layer of insulation material, sometimes called cladding, fixed to the outside walls of a house. This is finished with a layer of render so that the house looks the same as it did before, but warmer!

[INSERT SAMPLE IMAGE OF EWI FOR TENANT]

Will I get a choice of colour for the external walls?

If options are not available, be transparent and focus the resident to the comfort levels that will be achieved as well as the bill savings.

I've got a conservatory or lean-to shed. Can I still have external wall insulation?

Yes. **[provide more information]**

What is an air source heat pump?

An air source heat pump operates by harnessing warmth from the outdoor air, even in colder temperatures. It uses a clever process involving a refrigerant fluid that absorbs this heat, then compresses and releases it, usually via the water in radiators, inside a building to provide heating. Essentially, it's like a magic box that captures existing outdoor heat and brings it indoors, making it a cost-effective and eco-friendly way to keep your home warm in winter. The following dispels some of the myths around heat pumps.

Myth: Heat pumps are only suitable for well-insulated homes. **Fact:** While proper insulation can enhance the efficiency of heat pump systems, modern heat pumps are designed to work efficiently in a wide range of homes, regardless of insulation levels. Heat pumps can still provide significant energy savings and effective heating in homes with varying insulation qualities, making them a versatile option for decarbonizing heating systems.

Myth: Heat pumps are noisy and disruptive. **Fact:** Modern heat pump technology has significantly reduced noise levels, and many units operate quietly, similar to other household

appliances like air conditioners or refrigerators.

Myth: Heat pumps can lead to increased energy bills. **Fact:** Heat pumps are highly efficient heating systems that can reduce energy consumption compared to traditional heating methods like gas boilers or electric resistance heaters. While there may be initial upfront costs for installation, the long-term savings on energy bills often outweigh these expenses, making heat pumps a cost-effective and sustainable choice for homeowners. Additionally, government incentives and grants may be available to further offset installation costs and encourage the adoption of heat pump technology.

What is a ventilation system?

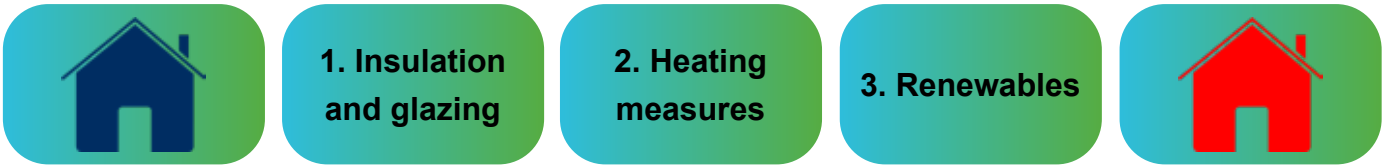
When a house is well insulated and draught-proofed, there needs to be a suitable and well-designed ventilation system to provide fresh air from the outside and expel stale air from rooms such as kitchens and bathrooms. Good ventilation in a home after a retrofit is crucial for maintaining indoor air quality and reducing the risk of health issues like mould growth and respiratory problems. Proper ventilation helps remove pollutants, excess moisture, and odours, creating a healthier living environment. There are various types of ventilation systems, including mechanical ventilation (such as exhaust fans or Mechanical Ventilation with Heat Recovery systems), natural ventilation (such as windows and vents), and hybrid systems that combine both approaches. Each type has its advantages and suitability depending on factors like climate, building design, and energy efficiency goals.

Will I have to empty my loft?

If you have any belongings in the loft, **[enter organisation name]** will help you remove them and provide somewhere to store them. We do not advise storing belongings in the loft after the work has been completed as this may damage the insulation and reduce its effectiveness. The depth of insulation may also make it potentially dangerous to enter the loft.

What is a fabric first approach?

You may need additional insulating measures to be installed prior to any work on your heating system, for example cavity wall insulation or loft insulation. The installer surveys will confirm which measures are most appropriate. This is important because in order for your heating system to be most efficient, so you save energy and money, homes should be fully insulated.



The Fabric First Approach

If you have just applied for heating or renewables, please note that these are the final considerations under the ‘fabric first’ approach. If your house needs insulation or double glazing first, the grant will have to support that.

Customer journey support

Working with you is what we do

Here are the series of steps you can expect on your customer journey with us

Recording your interest

We can take calls through our dedicated phone lines, through our websites, or whilst we deliver community events

Confirming your eligibility and next steps

If you are found to be eligible, we will then hand you over to technical specialists to assess and record what needs to be done before any work can start

Providing you with your energy efficiency pack

This will help you become accustomed to your energy efficiency measures, answer common questions, and will provide details of how to contact us

Capturing your feedback

We love to hear about your experience of our service and will record and capture this feedback from you

Sharing available retrofit government-funded schemes with you

We do this through targeted mailshots, road shows, events, and content displayed on our websites

Assessing your personal circumstances

We will assess things such as whether you have a landlord or not, the energy rating of your property, your household income, and where you live to see if you are eligible for the programme

Referring you on to an approved contractor

Approved contractors will carry out a technical survey, produce a schedule for your work, and confirm with you that you are happy to go ahead

Carrying out and completing the work

Your contractor will install the agreed measures in your home. The quality of the work will then be checked, any installation problems dealt with, and signed off only when you are happy

Keeping in touch

We want to hear how you are getting on with your new measures, so will give you a call within the first month of the contractors completing your work and chat through this with you

Phone call script during installation

Hello Mr/Mrs **[tenant name]**, my name is **[your name]**.

I'm calling on behalf of **[housing provider name]**.

I work for an energy efficiency charity called **[organisation name]** and **[your housing provider name]** has asked us to make contact with you when the work is finished to make sure you are happy, and to offer further advice and support on things like energy bills and switching energy providers. We have a website with lots of information on it, or we can send you information leaflets by post if you prefer.

This is a courtesy call to make sure you are happy with the improvement work that is going on at your property. Just to confirm, the planned work is: **[list energy efficiency measures]**.

We sent you an information pack that has a list of FAQs as well as a timeline of the process from start to finish. Have you had a chance to read through that yet? Do you have any further questions that weren't covered in the pack?

Do you have any specific accessibility issues/requirements? To confirm, you will not have to move out, but there will be times that we need to gain access to the property and there may be some disruption while the work is being done. For example, if one of your measures is loft insulation, then the loft will have to be fully cleared.

Your resident liaison officer is **[enter name]** and she/he will be in contact with you, if she/he hasn't already, to keep you informed about when the works are taking place.

Home Energy Diary (AFTER Installation)

Before any works began on your home, we asked you to complete the Home Energy Diary attached. Now that the energy efficiency improvements have been made to your home, we would really appreciate if you could complete the same Home Energy Diary. This enables us to observe the actual effects that the works have had on your home.

All the information you provide in the diary will be extremely useful. You don't need to complete it every day, or for the whole week - although this would be hugely helpful. Any data you're able to provide without taking up too much of your time, will be sufficient.

Please return this diary via **[add email address, postal address, or other return instruction]**.

Home Energy Diary (AFTER installation)				Week commencing: _____
Day	Time of day (note time if possible)	Indoor temp.	Is the heating on?	Comments: How do you feel? What's the weather like? Are you worried about using energy? Any other thoughts?
Monday	Morning			
	Afternoon			
	Evening			
Tuesday	Morning			
	Afternoon			
	Evening			
Wednesday	Morning			
	Afternoon			
	Evening			
Thursday	Morning			
	Afternoon			
	Evening			
Friday	Morning			
	Afternoon			
	Evening			
Saturday	Morning			
	Afternoon			
	Evening			
Sunday	Morning			
	Afternoon			
	Evening			

End of install questionnaire

MIDLANDS NET ZERO HUB

Personal Details					
Title		Name			
Address				Postcode	
Date of Birth		Contact No.			
Email Address					

Household Details			
No. of Adults (Aged 65+)		No. of Adults (Aged 18-64)	
No. of Children (Aged 12-17)		No. of Children (Aged 5-11)	
No. of Children (Aged 0-4)		No. of bedrooms	

What energy efficiency improvements were made to your home?	

Home Comfort			
Were the improvements made to your home explained to you?			
Definitely	To some extent	Not really	Definitely not
What indoor temperature do you consider normal for your home?			
In the month since your install, how much was your energy bill?			
Since your install, what was your energy bill tariff price?			
Before install:	£	After install	£

Have your energy bills reduced?			
Definitely	To some extent	Not really	Definitely not
Do you feel the works have improved the appearance of your home?			
Definitely	To some extent	Not really	Definitely not
Have any health conditions and general wellbeing improved or changed at all since install?			
Definitely	To some extent	Not really	Definitely not

Install Satisfaction

Do you find your home is now a more comfortable temperature?			
Definitely	To some extent	Not really	Definitely not
Are you aware of how to correctly use the new technology installed in your home?			
Definitely	To some extent	Not really	Definitely not
If No is answered to any of the above – please state reasons in box below			
Was the contractor who carried out the work reliable? i.e., arrived on time			
Definitely	To some extent	Not really	Definitely not
Was the work completed to a high standard?			
Definitely	To some extent	Not really	Definitely not

On a scale of 1 to 10 how would you rate the contractor (1 = very poor, 10 = excellent)									
10	**9**	**8**	**7**	**6**	**5**	**4**	**3**	**2**	**1**

On a scale of 1 to 10 please indicate how you would recommend the contractor's work to family and friends. (1=very poor work, 10 =excellent work									
10	**9**	**8**	**7**	**6**	**5**	**4**	**3**	**2**	**1**

Has retrofitting **ELIMINATED** the instance of any of the following problems in your house?			
Draught(s)	Yes	No	Did not have this issue
Cold	Yes	No	Did not have this issue
Condensation	Yes	No	Did not have this issue
Mould	Yes	No	Did not have this issue
Damp	Yes	No	Did not have this issue
Overheating	Yes	No	Did not have this issue
Has retrofitting **CAUSED** of any of the following problems in your house?			
Draught(s)	Yes	No	Did not have this issue
Cold	Yes	No	Did not have this issue
Condensation	Yes	No	Did not have this issue
Mould	Yes	No	Did not have this issue
Damp	Yes	No	Did not have this issue
Overheating	Yes	No	Did not have this issue

Please state any elements that you feel are not working as expected

Would you be interested in being a project case study? If so, we would ask you a few questions at home, take a few photos and videos of your home and the measures installed. You can remain anonymous, but the project case study could help other tenants decide on whether they can also benefit from a retrofit project.

Please tell us anything else that you think might be relevant to helping us improve what we do

Did you find the contractor who carried out the work reliable? (i.e., arrived on time, acted professionally, communication, manner, any excessive mess etc)

Is there any other help that you would benefit from?

- ☐ Insulation
- ☐ Draught-proofing
- ☐ Energy tariff/supplier switching advice
- ☐ Financial advice/assistance
- ☐ Energy related behaviour change advice
- ☐ Help using controls
- ☐ Small energy saving appliances e.g. LED bulbs, power down devices etc.
- ☐ Other (please detail):