

# Resident Engagement

## Supply chain advice pack

February 2025

Funded by:



Department for  
Energy Security  
& Net Zero

[www.riseretrofit.org.uk](http://www.riseretrofit.org.uk)

# Overview

Resident engagement is a critical component of successful retrofit projects. It refers to the process of involving residents in the planning, implementation, and evaluation of retrofit projects. Engaging residents ensures their needs and concerns are addressed, leading to smoother project execution and higher satisfaction. This advice pack is explicitly designed for the supply chain (contractors, etc.), providing an overview of why engaging residents matters, lessons from previous projects, stages of engagement, key skills, and considerations for effective engagement. Additionally, we have another RISE resident engagement toolkit specifically for housing providers and councils ([see here](#)).

## The role of the supply chain in resident engagement

Gaining residents' support is crucial for the successful implementation of retrofit projects, which often involve disruptive work. Effective resident engagement helps identify missing data for cost-effective surveying and prevents issues such as low uptake resulting in unspent funding, which can lead to project collapse. By involving residents from the outset, the project team can address potential concerns and ensure that the project meets the residents' needs and expectations. The Warm Homes: Local Grant (WH: LG) and Warm Homes: Social Housing Fund Wave 3 (WH: SHF) guidance documents emphasise that poor engagement can lead to challenges in project delivery, such as residents refusing access to retrofit installers and withdrawing from the project.

## Resident Engagement and PAS 2035 compliance

Ensuring the wellbeing of residents is central to planning and delivery, as required by PAS 2035. Government funded Warm Homes schemes must be PAS 2035 compliant.

Compliance with PAS 2035 provides a framework for maintaining high standards and quality in retrofit projects, ensuring that residents' needs are addressed throughout the process. This includes consulting leaseholders who may be affected by the retrofit.

Additionally, PAS 2035 mandates that the Retrofit Coordinator must ensure a comprehensive handover at the completion of the project. This includes providing the building owner and occupants with detailed information about the installed measures, maintenance requirements, and any warranties or guarantees.

# The stages of resident engagement

The engagement process can be divided into several stages. The supply chain can be involved at any, or all, of these stages, so understanding the purpose of the engagement stages is essential.

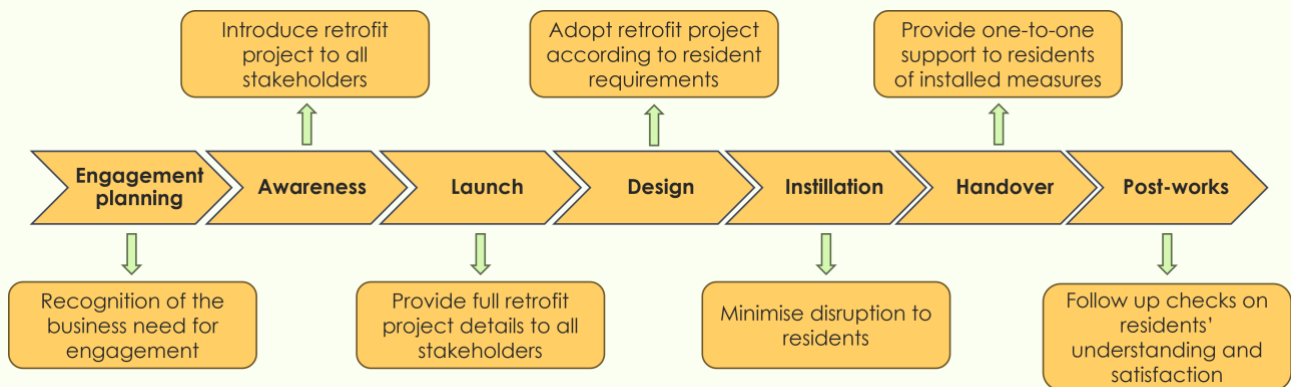


Figure 1. The seven stages of the engagement journey

During the planning stage, the need for engagement is recognised, and a plan is developed accordingly.

In the awareness stage, the project is introduced to all stakeholders, ensuring they understand the scope and benefits.

The launch stage involves providing detailed project information to stakeholders.

During the design stage, the project is adapted to meet residents' requirements and preferences.

The installation stage focuses on minimising disruption and providing one-to-one support to residents.

The handover stage ensures that residents understand the retrofit measures and how to use them.

Finally, the post-works stage involves following up to check residents' understanding and satisfaction with the completed work.

## Challenges during the installation phase

- **Access and timings:** coordinating access to homes and scheduling work at convenient times for residents.
- **Disruptions:** managing noise, dust, and interruptions to utilities such as heating and hot water.
- **Unanticipated obstacles:** addressing issues with various external fixtures and structures such as satellite dishes, sheds, decking, hot tubs, extensions, roof repairs, or hoarding.

- **Tenant vulnerabilities:** considering the needs of vulnerable residents, including those with health issues or disabilities.
- **Language barriers:** communicating effectively with residents who may not speak English fluently.
- **Pets:** ensuring the safety and comfort of pets during the installation process, while also considering the potential risks they may pose to installers.

## Reducing impact on residents during the installation phase

- **Cleaning:** regularly cleaning work areas to minimise dust and debris.
- **Making good:** repairing any damage caused during the installation and restoring the property to its original condition.
- **Decorating:** offering decorating services to improve the appearance of affected areas.
- **Fitting improvements/incentives:** installing additional improvements such as showers and solar PV systems.
- **Financial support:** providing financial assistance, such as putting money on residents' meters to cover increased energy costs during the installation.

## Learning from previous retrofit projects

Learning from previous retrofit projects helps us to improve future engagement strategies. Past projects have shown that residents may refuse to participate due to concerns about disruption, accessibility issues, sentimental value, or mistrust with landlords. By understanding these reasons for refusal, project teams can develop tailored engagement strategies that address these specific concerns, improving participation rates and overall project success. The WH: LG guidance highlights the importance of integrating lessons learned from previous schemes to enhance resident engagement. Examples can include:

- **How did you hear about us?:** include a 'how did you hear about us?' option to understand where your marketing is successful.
- **Drop-out rates:** if a resident drops out of a scheme, asking why so you can learn from this.
- **Customer feedback:** ask for customer feedback of the different stages and parties in
  - the process. E.g. spot-checking installer work and/or vice versa.
- **Follow-up checks:** check a few months after to ensure the install is still to their needs.
- **Customer suggestions:** having mechanisms for customers to give their improvement

# Planning the customer journey

Planning the customer's journey improves transparency and engagement with residents, minimises delays, reduces refusals, and creates a better customer experience. Identify a team, set clear objectives, identify stakeholders, develop a project plan, include lessons learnt from previous projects, identify areas where support may be required, monitor progress, share outcomes, and document lessons learnt for future activities.

## Role of the Resident Liaison Officer (RLO)

An effective and engaging Resident Liaison Officer (RLO) is a key role in the customer journey. The RLO acts as the primary point of contact between the project team and residents, ensuring clear and effective communication throughout the project. They address residents' concerns, provide updates, and offer support to minimise disruption and inconvenience. The RLO's responsibilities include coordinating access to homes, managing expectations, and ensuring that residents are informed and comfortable with the ongoing work. By fostering a positive relationship with residents, the RLO helps to build trust and enhance overall satisfaction with the project.

## Competent engagement and key resident engagement skills

- **Know the residents:** understand who lives in each home and their specific needs.
- **Multiple channels:** use various communication channels to contact all residents effectively.
- **Listening opportunities:** provide various opportunities for residents to voice their concerns and feedback.
- **Inclusive communication:** ensure communication is inclusive and accessible to all residents- including the young, old and vulnerable.
- **Information access:** ensure residents can easily access information about the project e.g. appointment reminders.
- **Support awareness:** make residents aware of support events and available assistance.
- **Digital confidence:** help residents improve their confidence in using digital tools and platform

## Team training

Provide training and resources to enhance the capabilities of resident engagement teams and contractors. Training and qualification in the following topics can be helpful for effective resident engagement:

- Energy awareness
- Fuel debt advice

- PAS2035 e.g. Domestic Energy Assessor, Retrofit Assessor or Retrofit Coordinator courses
- Equality, Diversity, Inclusivity and Accessibility (EDIA)
- Data protection
- Mental health awareness
- Disclosure and Barring Service (DBS)
- Safeguarding
- Complaints handling

## Engagement Considerations and Best Practices

- **Tailored communication:** use translatable formats for non-English speakers and adapt methods for residents with disabilities, such as remote engagement.
- **Inclusive process:** record and understand diverse needs, considering EDIA and SV (Social Value) at all stages.
- **Customer segmentation:** group residents based on shared characteristics to tailor engagement efforts effectively.

## Useful links

RISE has a range of materials to help you with resident engagement approaches

### Toolkits

[Resident Engagement Toolkit](#)

### Masterclasses

[Resident Engagement masterclasses playlist](#)

[Resident Engagement - Supply Chain support | RISE Masterclass](#)

[Resident Engagement and Lessons Learned | RISE Masterclass](#)

### Podcasts

[Resident Engagement for Warm Homes Retrofit Projects](#)

 [www.riseretrofit.org.uk](http://www.riseretrofit.org.uk)

 **RISE – Retrofit information, support & expertise**