RISE | Retrofit information, support & expertise

Project Team

Quick guide

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www.riseretrofit.org.uk

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How to use this quick guide?

This quick guide has been prepared to assist local authorities and registered providers looking to form a project team for retrofit. It is an introduction to the subject and those wishing to pursue this should refer to the other resources on the RISE website.

Forming a core project team

A good project team is the backbone of a successful retrofit project. Your core project team's combined expertise, effective communication, and collaborative problem-solving ensure that the project meets its goals, stays within budget, and is completed on time. The team's experience and qualifications also supports compliance with PAS 2035:2023, which specifies how proof of competence should be met for those fulfilling certain roles (see PAS 2035 roles section below).

It is crucial to consider the roles needed to fulfill a retrofit project at an early stage. This will help you to identify skills gaps and development needs, which can be met through recruiting new team members. Team members need not all work for the same organisation; many successful retrofit projects are the result of collaborative working between a number of project stakeholders.

Identifying the skills gap

A successful project team will comprise several different skills. The tables below set out the great range of skills that might be needed, so it is important to note that these skills may be available to the project team via supply chain organisations like the retrofit designer or contractor.

This means it is important to take stock of your current workforce and the supply chain skills available to you. Which skills are well-represented, and which will require development? How does this affect any plans to recruit new staff and procure supply chain organisations for delivery support?

Skills required to deliver a successful retrofit programme:

Resident focused design and delivery	• Tenancy laws • Social Value • Jobs and training • Enabling behaviour change • Communications and marketing
Project management	• Planning and scheduling • Budgeting and cost control

	• Risk management • Contract Management
Soft skills	• Communication and collaboration • Problem-solving and adaptability • Leadership

Technical skills required:

Asset data analysis	Collecting, processing, and interpreting data related to building assets. This includes understanding the current condition, performance, and usage patterns of various building components to inform retrofit decisions.
Engineering and design expertise	This skill encompasses structural engineering, mechanical systems design, and architectural modifications to enhance building performance and efficiency.
Knowledge of building codes and regulations	Ensures that retrofit projects comply with local, regional, and national standards. This includes understanding safety, accessibility, and environmental regulations to avoid legal issues and ensure occupant safety.
Energy efficiency technologies	This requires a knowledge of advanced systems and materials to reduce energy consumption such as insulation, HVAC systems, renewable energy sources, and smart building technologies.
Commercial expertise	Essential for managing the financial aspects of retrofit projects. This includes budgeting, cost estimation, procurement, and contract management to ensure projects are financially viable and delivered within budget.
Planning and heritage buildings expertise	An understanding the unique challenges of retrofit planning and more specifically, retrofitting historic structures is key. This includes preserving architectural integrity while upgrading systems for modern efficiency and compliance.

Insultation installers	Critical for improving a building's thermal performance. This includes selecting and installing appropriate insulation materials to reduce heat loss and improve energy efficiency.
Heat Pump engineers	Specialise in the design, installation, and maintenance of heat pump systems.
Maintenance workers	Ensure that retrofit improvements are sustainable over time. This includes routine inspections, repairs, and upgrades to keep systems functioning optimally.
Project or programme manager	Responsible for the overall management of retrofit projects. They oversee planning, execution, and delivery, ensuring that projects meet objectives, timelines, and budgets.
Resident liaison officers	Manage communication between retrofit teams and building occupants. They ensure that residents are informed, comfortable, and minimally disrupted during retrofit activities.
Communication or Marketing	Essential for promoting retrofit projects and engaging stakeholders. This includes creating awareness, educating the public, and managing public relations to support project success.

PAS 2035 roles

If you are aiming for your retrofit works to comply with PAS 2035, you must think carefully about fulfilment of the following roles:

Retrofit coordinators	Oversee the entire retrofit process, ensuring that all aspects of the project are aligned and progressing smoothly. They coordinate between different teams, manage timelines, and ensure compliance with project goals.
Retrofit assessor	Evaluate buildings to determine their suitability for retrofit projects by conducting detailed assessments of current conditions, identify areas for

	improvement, and recommend appropriate retrofit measures.
Retrofit designer	Create detailed plans for retrofit projects by integrating engineering, architectural, and energy efficiency considerations to develop comprehensive retrofit solutions.

Along with insulation installers and renewable energy engineers, PAS 2035 roles are those that are most in demand and can therefore be difficult to fill.

Wider teams within your organisation

Retrofit projects and programmes often involve different operational teams. These can include:

- Asset management
- Finance
- Maintenance
- Neighbourhood management
- Sustainability and net zero

Though you will have a core project management team accountable for project delivery, it is important to consider how and when input would be valuable from these other operational teams.

Some key considerations when drawing in teams from your wider organisation:

- Who knows about the organisation's property stock? Can they help you prioritise target properties?
- Who knows about the properties and their condition? Can they help you prioritise specific works?
- Who knows about the residents? How can they help you consult and involve the residents?
- Who knows about budgets that might be used to lever additional funding?
- Who has procured construction works before and has good contacts in local supply chain organisations?

Managing project teams

It can be complex to lead teams comprised of people from different areas of your organisation and even other organisations. As a 'matrix' manager, you should seek to:

1. Define roles and responsibilities clearly

- What are the different roles, responsibilities and accountabilities?
- How will these be agreed and communicated?
- How might these change over time? How will changes be agreed and communicated?
- What are the governance and escalation processes?
- What project management tools will be used?

2. Build capacity

- Does your team have all the skills it needs or are there areas that can be developed?
- If there are areas for development, is there training or shadowing opportunities that could allow the team to upskill?
- Are you aligning skills to your specific retrofit programme needs? E.g., do you have certain archetypes that will require specialist skills?
- Are you aligning skills to any futures areas of need? E.g., are you planning a PAS 2035 compliant project, that you need more retrofit coordinators for?

3. Performance monitoring

- Do you have clear goals and milestones that are communicated with the wider team?
- Do you have regular performance reviews and opportunities for feedback?