RISE | Retrofit information, support & expertise

Carbon Co-op: Trust as an enabler

Case study

October 2025

Funded by:

Department for Energy Security & Net Zero

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Summary

Carbon Co-op's area-based retrofit scheme in South Manchester brought together noteworthy financial, procurement, and contractual mechanisms to enable owner-occupying households' access to affordable, fabric first, whole house retrofit. As client intermediary, Carbon Co-op established trusting and collaborative working relationships with both the households and supply chain organisations involved in the project. Contractual documents were designed to capture the ethos of collaboration, which shared liabilities where appropriate. This case study reflects on the importance of trust in this project and should be useful to anyone considering how to engage new audiences in place-based retrofit approaches.

This publication aims to share insights, good practices, and lessons learned from relevant retrofit, sustainability, and warm homes projects. It is intended for informational purposes only and does not constitute recommendations or endorsements of specific suppliers, products, or services within the sector.

Readers that would like this document in a more accessible format should contact rise@turntown.co.uk.

Introduction

This case study shares information about Carbon Co-op's area-based retrofit scheme in Levenshulme, South Manchester. Working in partnership with its supply chain and several owner-occupiers, Carbon Co-op developed an approach to area-based working that incorporated noteworthy finance and procurement mechanisms. Much of the project relied on Carbon Co-op's role as a 'community intermediary', trusted to draw together different project stakeholders including households. The case study therefore reflects on this role and should be useful to anyone involved in engaging residents, stakeholders, and others in retrofit projects.

About Carbon Co-op

Carbon Co-op is a not-for-profit community energy company in Manchester, managed by a small staff team and governed by a board of directors that is elected by the membership annually. Its key organisational goal is that the domestic carbon emissions of Carbon Co-op members and the wider public in Greater Manchester (GM) and beyond, are radically reduced to an extent sufficient to avoid runaway climate change. One of the ways that this is achieved is through making fabric first, whole house retrofit possible to owner-occupiers simply and affordably.

The organisation has developed and delivered several innovative projects that have brought retrofit to its target owner-occupier audience. These include:

The Community Grean Deal GM Programme

- A Government funded project that allowed Carbon Co-op to offer 0% interest loans to households across Greater Manchester to retrofit their homes.
- A variety of households ranging by archetype and budget took part, demonstrating that zero cost finance could incentivise diverse owner-occupiers to take part
- Carbon Co-op acted as a client intermediary for the first time, procuring works from designers and contractors on behalf of households
- Monitoring before and since the 2015 installations has proven that the homes are more energy efficient and can achieve significant bill savings

People Powered Retrofit

- Now an organisation in its own right, People Powered Retrofit began as a Carbon Co-op project, a retrofit one stop shop that brought retrofit to willing-to-pay owner-occupiers while developing the local supply chain to meet the demand
- It led to the Home Retrofit Planner, a service and digital tool that helps households plan, procure and deliver home retrofit projects

Both projects, as well as many others, influenced the design of Carbon Co-op's area-based scheme.

Levenshulme area-based retrofit scheme

As described above, Carbon Co-op's Community Green Deal project had enabled zero cost loans to households. These loans were paid back on a monthly basis, creating a reserve for Carbon Co-op that had to be invested in reducing fuel poverty. Carbon Co-op used this to catalyse investment from Manchester City Council, in the form of 'group works loans' accessed directly by households eligible for the area-based scheme.

These two sources of funding, the Go Early reserves and the group works loans, meant that Carbon Co-op could offer different finance options to households depending on their circumstances. Drawing on the experience of delivering Go Early, Carbon Co-op wanted to develop a place-based retrofit scheme accessible to all, including those most vulnerable to fuel poverty.

With this in mind, the team set about identifying an area with:

- A diverse population that could benefit from different financial offers
- High density, hard to treat properties with similar archetypes
- Some community infrastructure that could support household engagement

Research that included mapping areas around Manchester to compare the data about the population and built environment showed that Levenshulme fitted the bill, and the Levenshulme area-based retrofit scheme (Lev ABS) was initiated.

Engagement with householders

Levenshulme was well known to Carbon Co-op staff and board members, who felt that local residents would engage with the project being planned. This was critical because involvement in the project would require households to collaborate not just with Carbon Co-op and the supply chain, but also with each other.

> An area-based scheme enables multiple nearby homes of the same type to be retrofitted. As an innovative approach, it requires a feat of collaboration to successfully engage both householders and professionals, facilitate the design of the works together, all while upholding quality and trust.
>
> Carbon Co-op

The initial engagement approaches involved:

- Working with Levenshulme Inspire Community Hub to identify streets to target with letters about the scheme
- Hanging posters in other local community venues, such as the library, leisure centres, cafes, and pubs

Both methods led to groups of neighbours being interested in the project. They were invited to meet each other, Carbon Co-op, and the supply chain at an event in late 2023, after which they confirmed their involvement in the project.

Group commissions

The success of the engagement work meant that Carbon Co-op, as client intermediary (see figure 1), could group commission and aggregate the following services for all households taking part:

- Retrofit assessments based on the property archetypes recommended a basic package of works that included:
  - External wall insulation (EWI) to the rear and side elevations
  - Triple glazed windows and doors to rears and sides
  - Loft insulation and chimney balloons
  - Airtightness works
  - Centralised ventilation
- Concept designs to inform planning permission for external wall insulation that would materially change the appearance of the buildings
- Measured drawings

- Structural surveys
- Asbestos surveys
- Detailed architectural designs
- Construction works

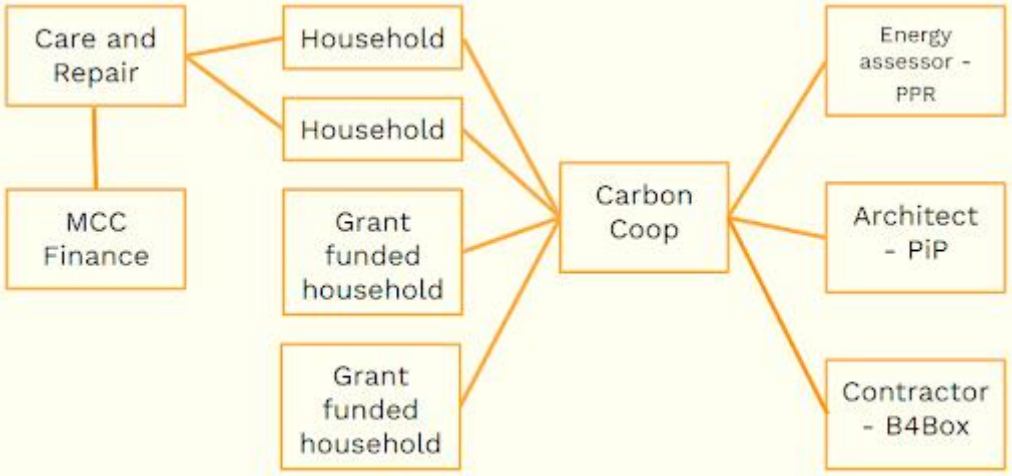

Figure 1 shows some of the relationships held by Carbon Co-op as the project's client intermediary. Source: Carbon Co-op

Collaborative working

Carbon Co-op's commissioning of the design and survey works on behalf owner-occupying households led to collaboration from all parties, with each undertaking discrete but related tasks:

Carbon Co-op:

1. **Finance:** Secured and blended a range of financial offers for households
2. **Appointments:** Ensured best value in commissioning works, not always shown through competitive tendering
3. **Contractual:** Established and managed contractual relationships with each party. Contracts were developed that captured the project's collaborative ethos, ensuring liabilities were appropriately shared
4. **Communication:** Created a no-blame culture with open communication channels

Households

1. **Finance:** Engaged with the different finance options and selected those that were most appropriate to their circumstances
2. **Appointments:** Enabled access to their homes for survey and construction works
3. **Contractual:** Engaged in a contract with Carbon Co-op that allowed it to commission works to their homes

4. **Communication:** Engaged with design decisions and project management issues through attending regular in-person and online meetings. Sometimes supported a non-digital neighbour to attend online sessions

Supply chain – e.g., energy assessors, architects, structural surveyors etc

1. **Finance:** Sought to provide savings by minimising numbers of site visits to Levenshulme and meeting clients in groups
2. **Appointments:** Acknowledged Carbon Co-op as key client and enabled household input as necessary, e.g., around EWI colour and window opening options
3. **Contractual:** Engaged by Carbon Co-op to work across several properties in multiple ownership but without being directly appointed by the property owner
4. **Communication:** Attended design team meetings with the key client regularly. Provided multiple opportunities for households to engage in the design choices, individually and as a group (figure 2)

Figure 2 shows households meeting with the project architect (left) and contractor (right to discuss the retrofit designs and installations. Source: Carbon Co-op

Supply chain – e.g., main contractor

1. **Finance:** Two years of pre-construction engagement before payment, regularly providing costings for Carbon Co-op to share with households to finalise the designs (e.g., some householders' decisions on front windows and doors were contingent on the cost of the basic package of works). Extended one-month validity period of the final quote, so that households could make their final design decisions
2. **Appointments:** Acknowledged Carbon Co-op as key client, while working with individual households when on-site
3. **Contractual:** Engaged by Carbon Co-op to work across several properties in multiple ownership but without being directly appointed by the property owner. Entered into a long-term partnering arrangement with Carbon Co-op to support future schemes and achieve environmental and social outcomes

4. **Communication:** Attended design team meetings throughout the pre-construction period, while establishing a relationship with households at occasional engagement events. Communicated directly with households when on-site

Trust as an enabler

As a pilot, the Lev ABS demonstrated that a trusted community intermediary can lead an area-based approach to retrofit effectively. Trusting and collaborative relationships established at the project's outset were carried through delivery, by being embedded in critical project documents such as the construction contract and household retrofit agreements. The no-blame culture and open communication that this enabled led to success at several important project moments:

- Early collaboration and negotiated tendering between client and contractor enabled supply chain development aspect, funded by the MCS Foundation (figure 3)
- Project delays experienced for numerous reasons throughout pre-construction were discussed honestly and sensitively. They did not cause any party to withdraw from the project
- The delays led to increased costs to align with inflation. Again, these were discussed openly so that a collaborative solution could be agreed
- There were countless other occasions where trust and collaboration formed the basis for overcoming challenges or making the most of opportunities. So much so, that it has emerged as a theme in some of the project's evaluation publications (linked below).

Figure 3 shows B4Box staff training in the firm's workshop (left) and on-site (right)

Further reading

- Carbon Co-op. *'Area based scheme' blog posts*
- RISE Retrofit. *Effective retrofit contract management with Sarah Fox*