

RISE

Retrofit information,
support & expertise

Developing an engagement approach

Toolkit

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Introduction

Effective resident engagement is fundamental to delivering successful, fair, and trusted retrofit projects. This toolkit provides practical guidance on understanding residents, tailoring communication, and embedding inclusive, people-centred approaches throughout any retrofit programme. It brings together methods such as customer segmentation and resident-first practices.

By applying these tools, organisations can build stronger relationships with communities, improve project outcomes, and support social value.

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

Who should use the toolkit?

This toolkit is designed for anyone involved in planning, delivering, or supporting retrofit projects, including:

- **Resident engagement teams** seeking structured and effective approaches.
- **Local authorities and housing associations** responsible for large-scale retrofit programmes.
- **Contractors, delivery partners and installers** who need to communicate clearly with residents before, during and after works.
- **Project managers and programme leads** developing overall engagement strategies.
- **Community groups or partners** involved in outreach, support or advocacy.

When should you use the toolkit?

Use this toolkit at the following stages of your retrofit planning and delivery:

Early project design / pre-engagement

When you need to build understanding of who your residents are, how to reach them, and what they may need. This includes early segmentation, data gathering, and planning communication approaches.

Before engaging with residents

To establish clear, consistent messaging, set expectations, and embed a resident-first approach.

Throughout resident engagement activities

Use the Ladder of Engagement, inclusive practice guidance, and communication tools to shape a structured and equitable experience for residents.

During live delivery and installation phases

To ensure communication flows, questions are addressed, and engagement methods remain tailored and responsive.

After project completion

To gather feedback, learn from outcomes, and refine approaches for future phases or larger rollouts.

Customer segmentation

This involves grouping existing and potential customers into relatively homogenous groups that can be measured, analysed and targeted using shared characteristics. An example of this is below:



Figure 1 contains examples of customer segmentation. Source: Turner & Townsend.

(Note: The categories you use to segment your residents into homogenised groups must be carefully considered to ensure it is not discriminatory to any residents)

Creating these groups helps to enable your resident engagement team in tailoring their efforts to reach out to your customers in the most fitting way. Ultimately, it is a simple idea that is backed up by rather less simple statistical analysis, which can be highly effective in ensuring your customers feel engaged!

Why is it important?

Customer segmentation is important to any engagement approach as it helps to make interactions relevant, inclusive and measurable. Generic messages take an approach where everyone is the same, whereas we know that homes and households vary. Things such as tenure and demographic can all shape what a "good" engagement approach looks like. By segmenting, you can tailor the why, what, how and when so that residents hear benefits that matter.

It also helps you to identify the needs of each segment easily. As a result, it then becomes easier to point out groups that may need extra attention as not every household will need the same level of support.

Resident segmentation for retrofit projects

Once you have selected how you want to segment your residents, there are a few steps to cover before you begin your implementation.

Data collection

Initially, before collecting data, you should define why you're segmenting (e.g. prioritise fuel-poor homes, tailor messaging). This helps to manage the approach in data collection and ensures that the data will be within scope and saves on collecting unnecessary information.

Tailored communication

Consider communication approaches to the different segmented groups. One may respond better to digital communications, and another to in-person visits. Developing an approach, such as 'Message, Method, Moments' can help to detail how you'll approach these different groups. See the table below.

Stage	Description
Segment	Renters with children.
Message	Focus the benefits of retrofitting their home, including savings on monthly bills, warmer homes and prevention of mould and condensation.
Method	Via social media, email, or community events.
Moment	Provide updates during installation, or reminders before work begins

Table 1 contains an example of a communication approach.

Starting small

Consider running a pilot project that focuses on priority segments in a few neighbourhoods as a trial run. You may find it helpful to do this as it allows you to refine and improve at scale further projects.

Refining and embedding approach with your respective groups

Review your approach with feedback from previous experiences and lessons learned to build on the things that went well and improve on the things that did not.

A resident first approach

Developing an effective engagement approach involves taking a resident first approach. You should:

- Get to know your residents.
- Be clear about the process of work.
- Simplify details.
- Tailor your approach for each resident.
- Ensure information flows.

Ultimately, putting people at the heart of your resident engagement strategy.

Why it's worth doing

Knowing your resident allows you to make better decisions and provide better outcomes. If you understand their needs and constraints it can help to reduce surprised and reduces rework. Another benefit would be that when considering residents first, the trust with your residents can be strengthened as having a transparent process, as well as making sure their voice is heard. Even where outcomes may disappoint some groups, clear reasoning plus visible influence from residents helps to reduce the negative impact. A further benefit of this approach would be that when you tailor your approach for each resident, such as considering accessibility options (e.g accessible formats, non-technical language), you can widen the participation and comprehension from residents.

Ladder of Engagement

This five step model can be used as a solid base to design how you want your resident to participate in engagement.

Devolving	Placing decision-making about the retrofit project in the hands of the community and residents.
Collaborating	Working in partnership with residents through each stage of the journey, including the development of alternatives, and the choice of the preferred solution.
Involving	Working with residents to ensure that their concerns and aspirations are understood and considered.
Consulting	Obtaining community or resident feedback to ensure their voices are heard and insights are considered.
Informing	Providing residents with balanced and objective information to help them understand the project.

Figure 2 shows the Ladder of Engagement. Source: Turner & Townsend.

Engagement can cover a varying range of things. The figure above lists out five key elements for developing the participation. From the top to the bottom, it is ordered by most to least involved.

A resident-first engagement approach moves along a clear path: informing, consulting, involving, collaborating, and finally devolving decisions to the community. Start by sharing clear, accessible information. For example:

- Ask for feedback and show how it shaped the plan with simple “You Said, We Did” updates.

- Work with residents to understand priorities, co-design options, and choose solutions together.
- Where it makes sense, give residents formal influence or control over defined decisions such as priorities, phasing, or local improvements.
- The goal is to begin with residents' needs, remove barriers to taking part, and give residents power over both the process and the results.

Case Study: Resident engagement and social value

Although this case study doesn't directly come from a retrofit project, it is still a great example of how councils can build engagement with their residents and ultimately achieve great social value benefits.

The challenge

Areas of Bolton have struggled to replace the industrial employment that was lost during the 1960s and 1970s, leading to high levels of unemployment, and issues with educational attainment.

The solution

Bolton council invested £180,000 in area, focused on building resident engagement, they employed many creative approaches:

- Fifty people were given free taxi rides in exchange for a meaningful conversation and mapping of their community networks during the ride. Council had taxi firms working for them at £15 per hour.
- Working Wardrobe – free smart clothing for local people to wear at job interviews.
- Poetry groups to explore the concerns of local people and to foster community relationships

The result

The increased engagement between council and residents had huge social value benefits for residents, with the council obtaining a greater understanding of neighbourhood issues and therefore being able to help better the local area for all.

This included:

- Increased intelligence on neighbourhood issues and concerns
- Boost in employment
- Increased awareness and engagement with Bolton Council
- Improved trust within the community

Links to resources referenced:

[Bolton Case Study](#)

[Developing a communications and engagement plan | RISE Masterclass Recording](#)

Additional resources

[Advanced Resident Engagement | RISE Masterclass Recording](#)

[Developing your approach to resident engagement | RISE Masterclass Event – 30th March 2026 \(12:00pm\)](#)



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