



RISE

Retrofit information,
support & expertise

Project management: Quality and quality assurance

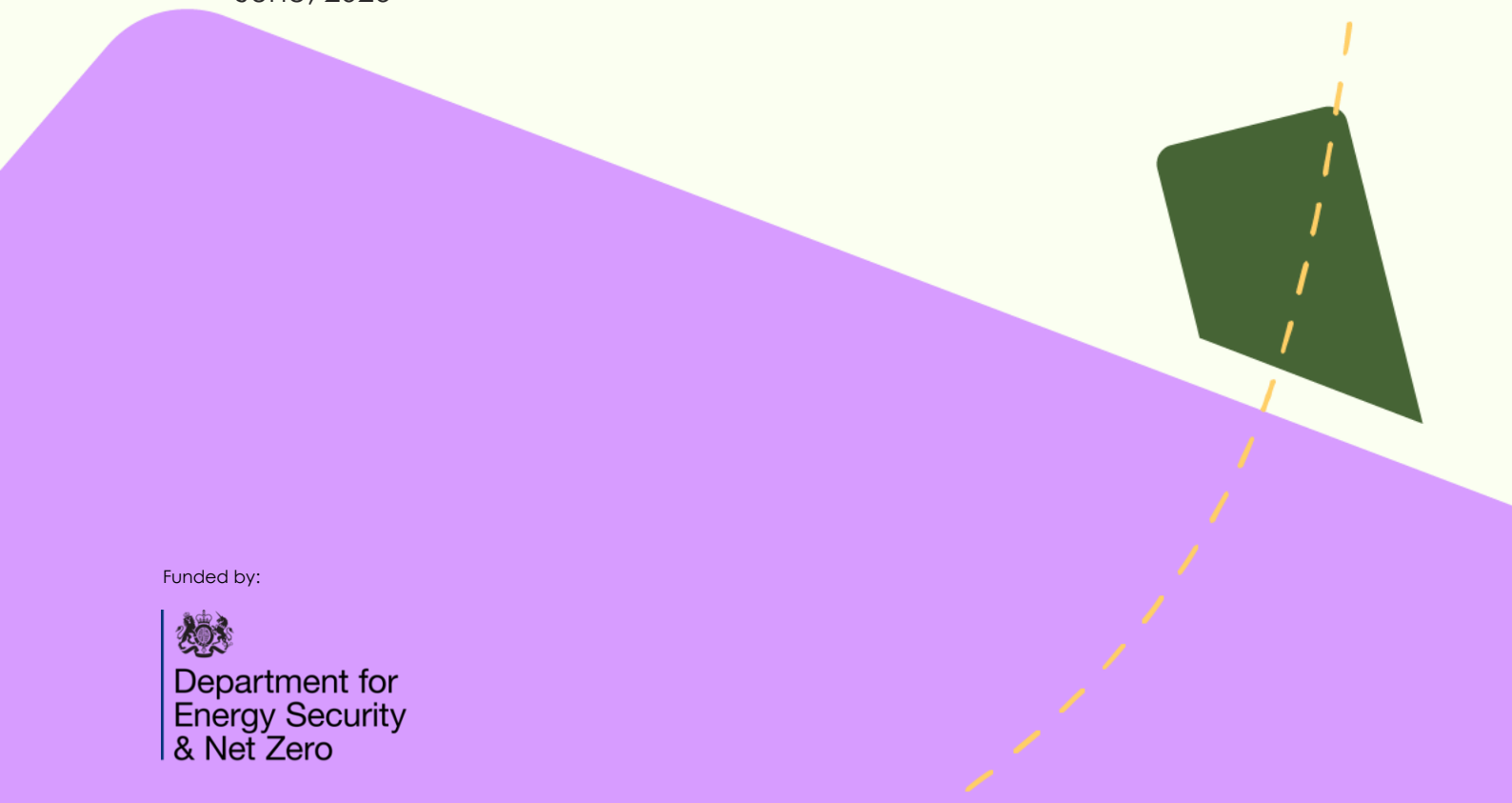
Supply chain advice pack

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Introduction

The Warm Homes funding schemes main goals are to upgrade homes so they have better energy and thermal performance, making tenants bills cheaper and tackling the fuel poverty crisis. The definitions of quality and quality assurance can be found below.

Quality

The fitness for purpose or the degree of conformance of the outputs of a process or the process itself to requirements.

Source: APM

Quality assurance (QA)

The planned and systemic activities implemented in a quality system so that quality requirements for a product or service will be fulfilled.

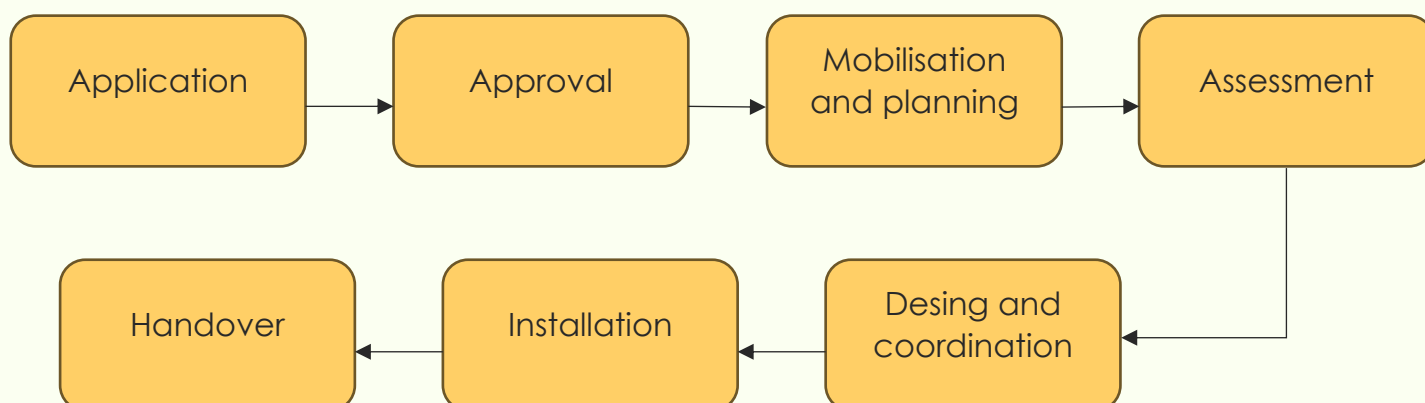
Source: Projectmanager.com

QA helps to minimise the risk of poor-quality work by ensuring that robust processes are followed throughout a project. It introduces structured "checkpoints" at key stages in the project lifecycle to maintain consistent quality and identify issues early. By making sure that work is completed correctly the first time, QA contributes to smoother project delivery and a better resident experience.

This advice pack will cover; **best practice examples, how to manage quality on site, how QA manages risk, managing quality and tracking performance, working effectively with project managers and common challenges to embedding QA**

Best practice QA

The diagram below shows a simplified example of steps of a warm homes retrofit project.



As mentioned previously, QA processes employ “checkpoints” along a project timeline. This table provides some examples of best practice QA and what stage in the project they will be performed.

Project stage	QA
Mobilisation and planning	Development of the QA plan.
Assessment	Photo collection of the site pre-works.
Assessment	Audit of reports.
Design coordination	Review of design to ensure compliance.
Installation	Evidence collection and review for quality.
Handover	Review of handover documents to ensure quality of content.

Best practice on site involves a range of actions and activities designed to ensure projects run smoothly and maintain high standards. This includes clearly defined role boundaries, thorough on-site briefings, and the consistent collection of photographic evidence at every stage of the project. It also requires careful checking of specifications and installation requirements, including logistical considerations, to avoid errors and delays. Ultimately, maintaining a consistent approach across all projects is key to achieving successful outcomes.

Evidence and KPI's

A strong evidence base enables QA teams to verify works remotely, reducing repeat site visits and helping identify issues early. On top of this, a good evidence bank also;

- Supports the clear audit trail required by PAS,
- Improves KPI monitoring, driving right-first-time installation,
- Helps highlight recurring quality issues,
- A bank of photo evidence can accelerate TrustMark lodgements,
- Ensure that work is readily defensible.

A good evidence photo should be of a good quality, and therefore more suitable for a thorough desktop review. The measure should be central in the frame and be close enough for detailed elements to be seen. The images below are examples of good evidence collection.



Source: Solar Shed



Source: Bailey Garner

Using QA to manage risk

QA is a key risk management tool used by project managers to mitigate the risk of poor-quality work. It enables early identification of issues by embedding checkpoints at critical stages of the project lifecycle. QA also promotes a standardised approach to maintaining high-quality work across different installers and contractors. Ultimately, this improves the resident experience by reducing the need for repeat visits by contractors.

We can use an example of how QA informs and mitigates risk through EWI installation on a retrofit project. A retrofit assessment would identify any damp risks at an early stage, followed by a design review to confirm that these issues must be resolved before installation begins. Through the QA process, a pre-installation check should ensure that the necessary remedial works have been completed, alongside the usual post-installation sign-off to verify quality.

In contrast, without QA, the remedial works to remove the damp and mould, leading to insulation being installed regardless. This can trap moisture within the property, resulting in resident complaints and ultimately requiring costly remedial works.

Although government-funded schemes do require projects to follow the PAS 2035 process, and installers to be accredited through schemes such as TrustMark and Microgeneration Certification System (MCS). This only mitigates the risk of poor

quality instead of guaranteeing it, it is important you review previous examples of work ahead of making agreements.

Working effectively with project managers

For delivery to be successful, it is essential that project managers and delivery teams work collaboratively, as responsibility of ensuring quality is shared across all parties. Project managers can only make effective decisions when they receive accurate, timely data, while the supply chain can only deliver efficiently when communication channels are clear and expectations are well defined.

For example, if an installer identifies that the on-site layout differs from the original survey, they should capture photo evidence and inform the project manager. With this information, the project manager can review the issue, update the scope of works, or design if required, and ensure the project remains on track. Ultimately this avoids delays, rework, and non-compliant installations.

What the supply chain can do	What project managers can do
Provide accurate data	Set clear expectations from outset
Provide timely photographic evidence	Maintain communication channels
Clearly communicate problems or delays	Plan/sequence works effectively
Adhere to QA processes	Provide clear QA processes

Common QA challenges

Embedding QA doesn't typically fail because people don't care about quality. Instead it often breaks down due to practical pressures such as tight timescales, limited resources, and unclear communication.

The key is to build QA processes into projects from day one and apply it consistently throughout the lifecycle. By doing this, teams can keep projects on track from the outset, reducing the need for reactive fixes and avoiding the disruption and cost of remediation later on.

The following are examples of common challenges you may face to the embedding of QA on site;

- Poor planning leading to rushed installers who may forget
- Inconsistent practice across teams
- Inconsistent communication between teams or personnel
- Late intervention reducing its effectiveness

Conclusion

Embedding QA throughout the lifecycle of projects is essential to delivering high-quality, compliant outcomes that leave residents satisfied and leave good reviews. By establishing clear processes and consistently applying QA from the outset, teams can identify risks early, minimise errors, and ensure efficient project delivery. Ultimately, a proactive and collaborative approach to QA not only reduces the need for costly remediation but also ensures residents remains at the centre of any project.

Resources



Podcast: All RISE podcasts are available [here](#).

Podcast: "Applying best practice in supply chains to SHDF" available [here](#).



Masterclass: All RISE masterclasses are available [here](#).

Masterclass "Winning as a retrofit delivery team" available [here](#).



Advice pack: All RISE advice packs available [here](#).

Advice pack: "Risk guidance for suppliers in retrofit" available [here](#).



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