



RISE

Retrofit information,
support & expertise

Community and resident engagement

Supply chain advice pack

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Overview

Community engagement is a key part of successful retrofit delivery. Warm Homes Social Housing Fund (SHF) and Local Grant (LG) schemes, industry standards and consumer protection frameworks increasingly expect organisations to demonstrate meaningful engagement with residents throughout the retrofit process.

This guide provides practical advice for supply chain organisations on supporting community engagement before, during and after retrofit works. It covers; understanding local communities, building trust, working with partners, planning engagement activities and delivering wider social value alongside technical improvements.

Introduction

Successful retrofit projects should improve building performance while supporting residents and strengthening communities. Effective engagement helps build trust, encourage participation and create co-benefits for residents through delivery. Supply chain organisations can contribute by creating local jobs, supporting apprenticeships, working with local Small Medium Enterprises (SMEs) and responding to community priorities.

This advice pack aims to support retrofit supply chain organisations to embed community engagement throughout the retrofit journey, using practical approaches, communication tools and partnership models to deliver successful place-based retrofit programmes.

Community engagement is often viewed as an additional requirement of retrofit delivery. However, effective community engagement can deliver direct benefits to supply chain organisations by improving resident participation, reducing project delays and supporting social value commitments.

Organisations that engage with communities effectively may benefit from:

- Higher resident access and consent rates
- Fewer refusals and complaints
- Reduced programme delays and aborted visits
- Better customer satisfaction scores
- Stronger relationships with clients and housing providers
- Meaningful social value delivery
- Access to local skills, apprenticeships and workforce pipelines
- Enhanced reputation and future bidding opportunities

Policy and standards



Retrofit projects must comply with standards and funding requirements that place residents at the centre of delivery. The organisations responsible for resident engagement will vary depending on the delivery model. In some projects, engagement is led by the client or asset owner, while in others it may be delivered largely by a turnkey provider or delivery partner. Regardless of who leads engagement activities, supply chain organisations support a resident-centred approach through clear communication, respectful delivery and positive resident experiences, in line with **PAS 2035** and **TrustMark** requirements.

In practice, **supply chain organisations can support compliance by:**

- Providing timely and accessible information
- Minimising disruption
- Responding promptly to resident concerns
- Ensuring site teams engage respectfully with residents
- Evidencing social value delivery by recruiting locally, participating in community events, supporting community initiatives and maintaining clear records of engagement activities and outcomes

Understanding communities before delivery

Effective community engagement starts with understanding local communities before delivery begins. Using local data and working with trusted organisations can identify barriers such as cost concerns, language differences and digital exclusion. This insight can be used to tailor engagement approaches, so activities are accessible, inclusive and responsive to residents' needs.

Building trust

Trust is essential to successful retrofit delivery. Residents are more likely to participate in retrofit when they have confidence in the organisations which are delivering the work and have a clear understanding of how retrofit will benefit them.

Establishing credibility

Trust is built through clear communication, transparency and impartial advice. Residents should understand project objectives and expected outcomes. Working with trusted organisations such as local authorities, housing providers and community groups can further strengthen confidence.

Early engagement

Early engagement should take place before works begin, helping residents understand the purpose, benefits and process of retrofit. Supply chain organisations can support this engagement by attending workshops, drop-in sessions and community events, providing technical expertise, answering questions about proposed measures and helping residents understand what to expect during delivery.

Tip: Early engagement can lead to fewer objections and complaints during installation.

Working with community champions

Trusted local individuals can be powerful advocates for retrofit and play a vital role in both community engagement. Respected members of neighbourhoods, can act as community champions to help build trust, strengthen local networks and create a sense of shared ownership around retrofit activity.

Community champions can support retrofit delivery by:

- Sharing their own retrofit experiences and lessons learned
- Explaining benefits and processes in accessible, non-technical language
- Encouraging participation through existing social and community networks
- Identifying local concerns, priorities and barriers to engagement
- Supporting community conversations, co-design activities and local events
- Helping residents feel informed, involved and invested in changes taking place in their area

Supply chain organisations can **identify and recruit champions** through:

- Community groups and resident associations
- Faith organisations and schools
- Voluntary and community sector networks
- Existing community leaders and local influencers
- Previous retrofit participants willing to share their experiences

Selecting champions who reflect the diversity of the local area can help ensure engagement reaches different communities and under-represented groups.

To be effective, champions should be provided with:

- An introduction to retrofit principles and common measures
- Guidance on funding options and resident support available locally
- Communication and engagement skills training
- Clear referral routes for technical, financial or specialist queries
- Regular briefings and updates throughout project delivery
- Opportunities to share community feedback and lessons learned

Providing ongoing support helps champions remain confident in their role and ensures residents receive accurate and consistent information. Involving community champions from the earliest stages of a project can help ensure retrofit plans reflect local needs and aspirations.

Supply chain organisations can work alongside champions by:

- Attending community events and drop-in sessions
- Supporting demonstration homes and site visits
- Providing clear technical information and visual materials
- Responding to resident questions and concerns
- Helping deliver wider placemaking and community benefit activities

Tip: Working with community champions means measures are more likely to be agreed by residents.

Trusted intermediary models

Trusted intermediaries, such as local authorities, community organisations, energy advice services and fuel poverty charities, can help residents understand and access retrofit. Their trusted relationships and local knowledge can improve engagement, particularly among residents who may be unfamiliar with retrofit or hesitant to engage with commercial providers.

Intermediaries can offer a range of practical support throughout the retrofit journey. This may include:

- Hosting information sessions and workshops
- Providing one-to-one advice
- Running outreach activities in community venues
- Helping residents understand funding and finance options
- Supporting the completion of applications and paperwork
- Coordinating home visits
- Signposting residents to trusted installers and additional support services
- Facilitating peer learning opportunities, such as resident forums, retrofit home tours or demonstration events where householders can hear directly from others who have already undertaken retrofit improvements

Supply chain organisations can strengthen community engagement by working collaboratively with intermediaries to design and deliver these activities. This might involve;

- Providing accessible technical information and case studies
- Contributing expert speakers to community events
- Supporting demonstration projects
- Developing locally relevant communication materials
- Attending advice sessions to answer resident questions

By combining technical expertise with the trust and local reach of intermediary organisations, supply chains can improve participation, build confidence and help create a more resident-centred retrofit experience.

Partnering with community organisations



Community organisations bring trusted relationships, local insight and access to established networks. Working with local charities, community energy groups, resident associations and other voluntary organisations can improve outreach, increase legitimacy and help engage groups that are often harder to reach through traditional communications. Community partners can also help tailor engagement activities, communications and support services to meet the needs of different audiences.

Key partners may include:

- **Charities** – Help engage vulnerable or hard-to-reach households and provide specialist support.
For example, disability charities can advise on accessible engagement approaches, and hearing charities can help develop videos with subtitles and BSL interpretation.
- **Faith organisations** – Provide trusted local networks, venues and communication channels.
For example, they may host information sessions in community spaces, share project updates through congregational newsletters, or facilitate introductions to groups that may not engage through mainstream channels.
- **Resident associations** – Offer insight into local priorities, concerns and preferred communication methods.
For example, they can help test communication materials, identify suitable times and locations for events, distribute information to residents and provide feedback on proposed retrofit plans.
- **Local retrofit champions** – Share first-hand experiences and support peer-to-peer engagement.
For example, champions can speak at community events, feature in case studies and videos, or host demonstration home visits.
- **Advice organisations** – Provide impartial guidance and practical support.
For example, they can deliver one-to-one advice sessions, assist residents with funding and grant applications, or explain consumer protections.

Maintaining a visible local presence through community events, advice hubs and face-to-face support builds trust, strengthens relationships and encourages resident engagement throughout the retrofit journey.

Case study: Carbon Co-op and People Powered Retrofit

In Greater Manchester, **People Powered Retrofit** was established by community energy organisation **Carbon Co-op** and partners to address a lack of trust and confidence among residents.

The programme developed a **community-led intermediary model**, providing independent advice and support throughout the retrofit journey. Homeowners receive guidance on home assessments, retrofit planning, procurement and quality assurance, helping them make informed decisions and reducing the perceived risks associated with retrofit projects.

By using a trusted intermediary, contractors were able to engage residents more effectively, improve confidence in retrofit measures and reduce barriers to participation. This created a **stronger pipeline of retrofit projects** and improved resident **readiness for installation**.

Communication and engagement tools

Community engagement should be embedded throughout the retrofit journey, from awareness and interest through to assessment, design, installation, handover and aftercare. Communications should be clear, consistent and honest, using a mix of face-to-face, digital and community-based channels to reach different audiences, build trust and support ongoing dialogue and feedback.

Communication tools:

Tool	How it supports placemaking and supply chain delivery
Door knocking	Builds early relationships, identifies concerns and improves resident participation, reducing delays during delivery.
Home visits	Creates personalised conversations that build trust and encourage informed decisions about retrofit works.
Community events	Strengthens local relationships, encourages shared ownership of projects and demonstrates investment in the wider community.
Workshops	Enables two-way dialogue, allowing residents to influence delivery while helping the supply chain identify issues early.
Digital engagement	Extends participation by providing accessible information and convenient ways for residents to ask questions and provide feedback.

Social media	Maintains visibility, celebrates local success stories and reinforces positive perceptions of retrofit within the community.
Newsletters	Keeps residents informed, manages expectations and helps maintain confidence throughout the project.
Community Champions	Uses trusted local voices to increase participation, reduce uncertainty and encourage wider community buy-in.
Demonstration homes	Gives residents confidence by showcasing completed retrofit measures, helping improve acceptance and reduce reluctance during installation.

Tip: Different residents have varying needs. Whilst some may respond well to digital communication such as social media, others may not have access to digital platforms and therefore may require alternative communication methods. Combining several methods means you are more likely to reach more residents.

Practical tools:

Tool	Purpose
Engagement planning checklist	Helps project teams define objectives, target audiences, engagement methods, roles, resources and measures of success.
Communication plan templates	Support consistent, planned communications with residents and stakeholders throughout the retrofit journey.
Stakeholder map	Identifies key individuals and organisations, such as residents, community groups, local authorities and housing providers, to help target engagement effectively.
Resident journey map	Tracks resident engagement from awareness to aftercare, helping ensure the right information and support are provided at each stage.
Community profile template	Brings together information on local demographics, housing types, community assets, languages and potential barriers to engagement, helping tailor communications and activities to local needs.
Community champion toolkit	Provides champions with key messages, presentation materials, contact information, engagement guidance and referral routes.

Resident feedback surveys	Captures resident views before, during and after retrofit to improve project delivery and measure engagement effectiveness.
Co-design workshops	Enables residents to contribute to project planning, helping ensure retrofit proposals reflect local priorities and concerns.
Visual communication materials	Uses infographics, illustrations, videos and simple retrofit guides to explain technical information in an accessible way.
Digital engagement tools	Supports engagement through webinars, online surveys, social media campaigns, video case studies and virtual information sessions.
Contact and referral management system	Tracks enquiries, referrals and follow-up actions to ensure residents receive timely support throughout the retrofit journey.
Monitoring and evaluation framework	Measures participation, resident satisfaction, behaviour change and engagement outcomes to inform future projects.

Creating local social value

Retrofit projects provide an opportunity for supply chain organisations to deliver social value alongside energy efficiency improvements. By working with clients and community partners to identify local priorities, social value activities can be embedded into procurement, delivery and reporting processes from the outset.

Supply chain organisations can contribute to social value through a range of activities during project delivery, including:

- **Creating local employment opportunities** by advertising roles locally, attending jobs fairs, offering work experience placements and recruiting from communities where retrofit programmes are being delivered.
- **Providing apprenticeships and developing skills** through apprenticeship schemes, traineeships, school and college engagement, and upskilling opportunities for existing employees.
- **Supporting SMEs and strengthening local supply chains** by subcontracting work to local businesses where appropriate, holding supplier engagement events and helping smaller firms understand procurement and accreditation requirements.
- **Delivering community engagement and education activities** through energy advice sessions, retrofit workshops, demonstration home visits and

awareness-raising activities with community champions and local organisations.

- **Supporting community benefit initiatives** by contributing staff time, resources or funding to local projects, environmental improvements and community-led activities.

Benefit to the supply chain

Implementing social value benefits such as local recruitment, apprenticeships, and SME partnerships can improve the supply chain's access to a workforce, future skills pipe and develop stronger local delivery capacity and engagement.

Measuring success

Measuring engagement helps demonstrate whether retrofit projects are reaching residents, building trust and delivering social value.

Key measures include:

- **Engagement key performance indicators (KPI)** – Number of residents engaged, events held, home visits completed and enquiries generated.
- **Participation rates** – Attendance at events, assessment uptake, consent rates and project completions.
- **Accessibility** – Engagement across different communities, tenures and vulnerable households, using accessible formats where needed.
- **Resident satisfaction** – Feedback on communications, engagement activities and confidence in retrofit measures/quality of handover process.
- **Community outcomes** – Increased awareness, stronger community networks and greater participation in sustainability initiatives.
- **Social value** – Local 'green' jobs, apprenticeships, training opportunities, SME involvement and community benefit activities.

Projects should capture lessons learned and monitor engagement activity, participation, resident feedback and social value outcomes to inform continuous improvement and future delivery.

Next steps

Community engagement should be viewed as a delivery enabler rather than a standalone activity. By working with local partners, supporting social value objectives and building trust with residents, supply chain organisations can improve access rates, reduce project risk, strengthen client relationships and contribute to long-term community outcomes.

Resources



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