



RISE

Retrofit information,
support & expertise

How to write a resident engagement and marketing plan

Supply chain advice pack

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www.riseretrofit.org.uk



Introduction

Communications (comms) and engagement plans are an essential part of all retrofit programs. Without them there is an increased risk of resident refusals and property access. This can put delivery of retrofit work at risk and reduce the number of homes completed. Overall having a direct knock-on effect to the amount of funding or income that can be claimed.

Step 1; Understand the residents.

Before developing a comms and engagement plan it is essential that organisations understand the residents they will be working with. **It is important to take these factors into account:**

- Who is the audience organisations are trying to communicate and engage with?
- What is important to them?
- What is their preferred method of communication?

Step 2; Understand who are the relevant stakeholders

The stakeholders within a retrofit project are extremely important, as they can assist in communicating to residents delivering key messages to them in an effective way. **The roles of stakeholders in resident engagement are:**

- Engage residents through workshops, surveys, and social media to understand concerns and priorities.
- Provide accessible information about retrofit benefits.
- Include residents in decision making for retrofit.
- Support residents throughout the installation.
- Keep residents informed about progress and updates.
- Share any feedback and lessons learnt.

Step 3; Understand the works required and how this will impact residents.

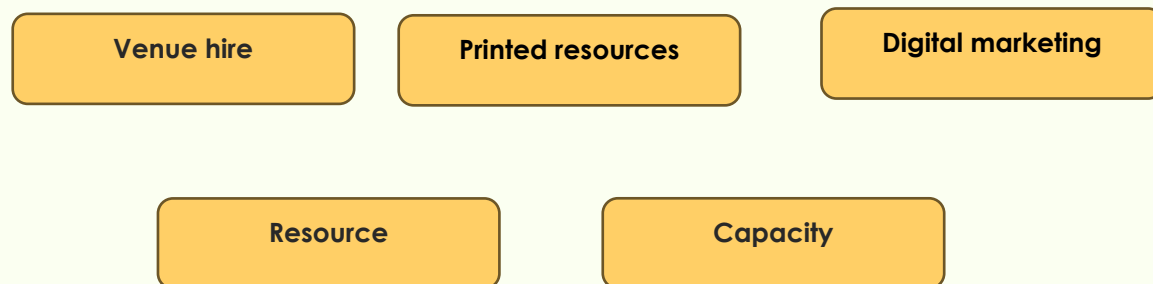
It is important to consider the works that are aiming to be completed within the retrofit project and how this may affect residents within their day to day lives.

1. What works are likely to happen in their homes, be clear about the works taking place during each stage of the project.
2. Highlight how the works completed will benefit their lives, from reducing energy use and damp and mould within the homes to keeping them warmer.
3. Communicate the exact details of the works and whether it is safe for the residents to be at home whilst this is taking place and any restrictions they may have if they are able to stay in their home.

Step 4; Understanding the budget and capacity.

Key considerations to have in mind when implementing a comms and engagement plan is the budget and staff resource.

How much can be spent on:



Step 5 engagement and scope

The retrofit works that are taking place clarify with residents that they have a say in. If any of the work being completed it non – negotiable.

Decision making explain the process behind the decisions being made for works to their homes and the benefits of this.

Confirm what is in the scope of the retrofit works and what outcomes are not possible such as a new kitchen is not an outcome.

Step 6 understand programme delivery and timescales.

Before engaging with residents, ensure there is a clear understanding of the programme of works, including what work is being delivered, where it will take place, and when it is planned to start.

Key considerations:

- Understand the scope, location, and delivery timescales of the works.
- Develop a clear plan for resident engagement before works begin.
- Participate in community events and local activities where possible.
- Ensure residents have a recognised point of contact whom they can become familiar with and approach throughout the project.

Step 7 understand key messages to share with residents.

Clear, timely, and accessible communication can help residents understand what to expect and support successful project delivery.

Key considerations:

- Align communications with the planned sequence of works.
- Use clear, simple language that is easy to understand.
- Consider the needs of all residents, including those requiring alternative formats or additional support.
- Ensure information can be translated or adapted where required, including the use of community languages or sign language services

Step 8 ways to communicate with residents

Residents may prefer different methods of communication and engagement. Using a range of approaches can help maximise reach and participation throughout the retrofit journey.

Consider using:

- Letters and leaflets
- Resident meetings and workshops
- Door-to-door engagement
- Community events and drop-in sessions
- Email communications
- Text message reminders
- Social media and online platforms
- Project websites and FAQs

Using a mix of communication channels can help ensure information reaches residents effectively and encourages ongoing engagement.

Step 9 develop a comms and engagement plan.

Planning communications in advance helps keep residents informed, engaged, and supported throughout the project.

Plan example:

Communication Activity	Purpose	Lead Responsibility	Resources Required	Timing	Success Measure
Letter to residents	Inform residents about energy efficiency assessments and project timescales	Project Manager	Letter, process flowchart	1 month before works start	Resident dropout rate
Residents' meeting	Explain the process and answer questions	Contractor	Presentation, FAQs, contact details	2 months before works start	Number of attendees; resident dropout rate
Resident walkabout	Provide face-to-face engagement and support	Resident Liaison Officer	Letter, FAQs	1 week before works start	Number of residents engaged
Reminder text	Remind residents of upcoming appointment	Resident Liaison Officer	Text message content	Day before appointment	Attendance rate

Step 10 deliver and review.

Throughout organisations should continuously ask residents for feedback at each phase of the project. So that they can understand what is working well and what needs to be improved and apply changes they feel would be suitable ad work effectively to achieve better results.

Taking the time to run through these steps can help with developing the comms and engagement plan. The stronger and better the plan the delivery will have a greater chance of refusals and deliver more work.

Resources



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

Podcast: "Resident Engagement for Warm Homes Retrofit Projects" available [here](#).



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

Masterclass "Resident Engagement and Lessons Learned" available [here](#).



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

Advice pack: "Resident Engagement Toolkit" available [here](#).

