



RISE

Retrofit information,
support & expertise

What clients need from the Supply Chain during retrofit delivery

Supply chain advice pack

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Introduction

Purpose

This advice pack explores lessons learned from recent retrofit programmes, including the Energy Company Obligation (ECO), Great British Insulation Scheme (GBIS), Social Housing Decarbonisation Fund (SHDF), Home Upgrade Grant (HUG), Local Authority Delivery (LAD) and Warm Homes. It explains what clients increasingly need from their supply chain to deliver successful retrofit projects.

Throughout this pack, the term client refers to organisations responsible for procuring, managing or funding retrofit delivery, including local authorities, housing providers, asset owners and programme delivery organisations.

The supply chain has changed

Historically, retrofit supply chains were primarily associated with installation and product delivery. Today, clients are increasingly looking for delivery partners who can support programme administration, compliance, resident engagement, evidence gathering, quality assurance and project coordination. Across recent retrofit programmes, challenges have often arisen not because measures could not be installed, but because programme success is increasingly dependent on effective administration, evidence management, coordination, quality assurance and resident engagement. Across recent retrofit programmes, clients have found that strong delivery outcomes depend as much on these supporting functions as they do on installation activity itself.

What clients need today

Traditional expectation	What clients need today
Install measures	Deliver outcomes for residents
Complete works	Support programme delivery
Provide labour	Provide competence and capability
Submit paperwork	Manage evidence throughout delivery
Meet technical requirements	Manage quality, compliance and reporting

Lessons learned

Lesson 1: Programme administration can make or break delivery

Many retrofit programmes have experienced delays because of missing documentation, incomplete evidence records, inconsistent data and reporting issues. Clients often spend significant time resolving administrative problems that could have been avoided through better processes and communication.

What clients need

Client Need	What the supply chain can do
Accurate records	Maintain evidence-ready documentation throughout delivery
Timely reporting	Submit information promptly and consistently
Reduced admin burden	Use standardised processes and templates
Confidence in compliance	Quality-check documentation before submission

Supply chain tip: Treat administration as part of delivery, not as a separate task completed after installation.

Lesson 2: Clients need delivery certainty in an uncertain funding environment

Changes to funding programmes, policy transitions and uncertainty around future schemes can create challenges for both clients and suppliers. In this environment, clients are increasingly looking for delivery partners who can provide confidence that projects will be delivered reliably despite changes in market conditions, funding availability or programme timescales.

Clients need confidence that their supply chain can maintain capability, mobilise resources, retain skilled staff and continue delivering against agreed milestones even when the wider market is uncertain.

Client need	Why it matters
Delivery certainty	Confidence that projects will be completed as planned
Stable workforce capacity	Reduced disruption and continuity of delivery
Realistic forecasting	Better programme planning and resource allocation
Early communication of risks	Enables proactive mitigation and decision making
Business resilience	Supports delivery through scheme and policy changes

Practical supply chain actions

Action	Benefit
Workforce planning	Reduces delivery disruption
Maintain delivery pipelines	Improves business resilience
Communicate openly with clients	Supports programme planning
Diversify workstreams	Reduces reliance on a single funding scheme

Lesson 3: Quality assurance is now a core delivery activity

Clients are accountable for demonstrating that funding has been spent correctly and that retrofit measures deliver the intended outcomes. Quality assurance is therefore no longer simply a compliance exercise; it is a core delivery activity that provides assurance, protects programme funding and supports successful retrofit outcomes.

Clients increasingly need supply chain partners who can maintain audit readiness, provide robust evidence and demonstrate consistent quality throughout delivery.

Client need	Supply chain response
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PAS compliance	Robust quality management procedures
Reliable evidence	Comprehensive documentation and audit trails
Consistent installation standards	Quality inspections throughout delivery
Reduced risk	Early identification of issues
Audit readiness	Maintain complete evidence and clear audit trails

What clients need to see:

- Complete and accurate evidence records.
- Robust audit trails and documentation.
- Consistent installation standards.
- Clear quality assurance procedures.
- Early identification and resolution of defects.

For further reading, take a look at our Supply Chain Advice Pack on Quality through connected data [here](#).

Lesson 4: Programme management is no longer optional

As retrofit programmes become larger and more complex, clients increasingly rely on their supply chain to support successful programme delivery. Many clients now expect delivery partners to support aspects of programme management, particularly within larger retrofit programmes. Coordination, scheduling, reporting and issue management are increasingly viewed as supply chain responsibilities.

What clients need

Client need	Supply chain contribution
Delivery planning	Maintain realistic programmes and milestones
Coordination	Communicate effectively with delivery partners and stakeholders
Reporting	Provide timely updates on progress, issues and risks
Risk management	Identify and escalate delivery issues early

Commissioning and handover	Support successful project completion and resident outcomes
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Supply chain tip: Clients increasingly value organisations that make projects easier to manage, not just organisations that complete installations.

Lesson 5: Resident communication is part of delivery

Successful retrofit delivery depends as much on resident engagement as it does on technical installation. Resident engagement can influence access, programme performance, resident satisfaction and overall project success.

Clients increasingly expect their supply chain to play an active role in delivering a positive resident experience throughout the retrofit journey.

What clients need

Client need	Good practice
Clear communication	Explain works and timescales
Reduced complaints	Maintain regular updates
Support for vulnerable residents	Tailor communication approaches
Positive customer experience	Proactive engagement throughout delivery
High resident participation	Engage early and support access arrangements
Positive resident outcomes	Provide guidance on using measures effectively

What clients need beyond installation:

Clients increasingly expect supply chain partners to support residents beyond physical installation. This includes providing clear information on:

- How installed measures should be used and maintained.
- What benefits residents should expect.
- What happens after project completion.
- Who residents should contact if issues arise or further support is needed.

Lesson 6: Clients need delivery partners who can manage risk

What clients need

Clients need confidence that delivery partners can identify risks early, maintain compliance, adapt to changing market conditions and minimise disruption to programme delivery. This requires more than simply responding to issues as they arise. It means having robust processes, maintaining capability and communicating openly throughout the project lifecycle.

Client need	What supply chain can do
Early identification of risks	Monitor delivery risks continuously and raise issues before they affect programme performance.
Confidence in compliance	Maintain robust quality assurance processes, evidence collection and audit-ready documentation.
Delivery resilience	Maintain workforce capability and contingency plans to manage programme or market changes.
Adaptability	Respond effectively to changes in funding requirements, policy updates and client expectations.
Reliable programme delivery	Manage labour, materials and resources effectively to minimise disruption and delays.
Whole-house competence	Demonstrate the technical capability needed to assess interactions between measures and achieve intended outcomes.

Common areas of supply chain risk

Risk	Potential impact on delivery
Compliance capability	Audit failures, non-conformances and delayed payments
Workforce shortages	Reduced delivery capacity and programme delays
Supply chain disruptions	Material shortages and installation delays
Whole-house knowledge gaps	Poor retrofit outcomes and unintended consequences

Market and funding uncertainty	Workforce instability and reduced delivery confidence
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Supply chain tip: Clients increasingly need partners who can manage delivery risk proactively rather than simply respond to problems. Organisations that can demonstrate resilience, compliance capability and adaptability are better positioned to build trust and secure future work.

Lesson 7: Becoming a trusted delivery partner

The most successful retrofit programmes are often built on long-term relationships between clients and their supply chain. While technical competence remains critical, clients increasingly value organisations that contribute to programme success through proactive communication, collaboration and problem-solving. In a sector characterised by complex delivery requirements, evolving funding programmes and increasing compliance expectations, trusted delivery partners can help reduce client workload, improve delivery certainty and support better outcomes for residents.

Trust is built through consistently meeting commitments, identifying issues before they become problems and maintaining open communication throughout delivery. Organisations that focus solely on completing contractual tasks may successfully deliver individual projects, but those that support wider programme objectives are more likely to secure repeat work and develop long-term client relationships.

What clients need

Client need	What the supply chain can do
Delivery confidence	Consistently meet agreed milestones, quality standards and reporting requirements.
Proactive communication	Raise issues early, provide regular updates and maintain transparency throughout delivery.
Collaborative problem-solving	Work with clients and delivery partners to identify practical solutions when challenges arise.
Trusted advice and expertise	Share lessons learned, market insight and technical knowledge to support decision-making.

Long-term reliability	Demonstrate consistency, competence and a commitment to continuous improvement.
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Characteristics of trusted partners

Trusted delivery partner	Traditional contractor approach
Proactively communicates progress and risks	Reports issues only when asked
Identifies solutions alongside problems	Focuses on identifying issues only
Supports wider programme objectives	Focuses solely on contractual outputs
Shares knowledge and lessons learned	Retains information within individual projects
Builds long-term relationships	Focuses on individual contracts
Contributes to continuous improvement	Delivers only minimum requirements

What this means in practice

Trusted delivery partners understand that successful retrofit delivery extends beyond installation activities. They recognise the pressures faced by clients around funding, compliance, resident satisfaction and programme performance, and actively support these objectives through reliable delivery and collaborative working.

Organisations that consistently demonstrate these behaviours are more likely to strengthen client relationships, increase opportunities for repeat work and become preferred partners for future Warm Homes and large-scale retrofit programmes.

Supply chain tip: Clients increasingly value certainty, reliability and collaboration as much as technical competence. The organisations most likely to secure repeat work are those that make retrofit programmes easier to manage, not just those that complete installations successfully.

What clients want: A supply chain checklist

Requirement	Can we demonstrate this?
Accurate administration and reporting	Yes/No
Strong quality assurance processes	Yes/No
PAS and compliance capability	Yes/No
Workforce stability and competence	Yes/No
Effective resident engagement	Yes/No
Programme management support	Yes/No
Risk management processes	Yes/No
Robust evidence collection	Yes/No
Reliable commissioning and handover	Yes/No
Collaborative working practices	Yes/No

For further reading, take a look at our Supply Chain Advice Pack on Working in area-based retrofit schemes [here](#).

Conclusions

Recent retrofit programmes have shown that successful delivery depends on much more than installation capability. Clients increasingly need supply chain partners who can support programme administration, compliance, quality assurance, resident engagement and delivery coordination while maintaining high technical standards.

Organisations that invest in these broader capabilities are more likely to strengthen client relationships, reduce delivery risks and position themselves as trusted partners for future Warm Homes and large-scale retrofit programmes.

Resources



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

Podcast: “Best practice in procurement with Fusion 21” available [here](#).



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

Masterclass “Protecting customers in retrofit projects” available [here](#).



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

Advice pack: “Consumer protection in retrofit” available [here](#).

