

Carbon Co-op

Retrofit for All

**Making energy efficiency schemes
work for people.**

29th April 2021



Note on Recording

We will be recording this event and sharing it online on our YouTube channel and on our website.

If you would prefer not to be in the recording please switch off your camera and you can change your name by clicking on the participants button and renaming yourself. We will not publish the chat.

A few bits...

Please turn videos off and mute yourself during presentations.

Please put your questions in chat box as we go along, to be answered during the Q&A.

Technical support is Matt Franklin - message using the chat box if you're having technical issues.

Welcome and Agenda

14.00	Introductions
14.02	Helen Seagrave, Electricity North West
14.05	Aneaka Kellay, Carbon Co-op - Retrofit for All: making energy efficiency schemes work for people
14.45	Filipe Amarante, National Energy Action - Taking a people-centred approach to remediation work – Warm & Safe Homes (WASH) in Fishwick, Preston
15.55	Q&A
15.15	Toolkit feedback
15.30	Ends

Introduction to Carbon Co-op

Member organisation

Retrofit

Energy Systems

Creative policy/citizen engagement

Energy Justice



Helen

Seagrave

Electricity North
West



Retrofit for All

Aim: Explore how funded energy efficiency schemes in the context of energy vulnerability can be more effective.

Methodology: Desk-based research, ten interviews undertaken with six local authority workers, two charity workers, one contractor and one journalist during 2019 and 2020.

The direct experience of resident-client will feed into future editions of the toolkit. This work is not intended to be static but to be added to and evolve with continuing research.

Note on the term 'resident-client'

Typically in funded energy efficiency schemes, the client refers to the organisation commissioning the works.

The term 'resident-client' denotes the resident or **tenant** as the **client** alongside the commissioning organisation.

Setting the Context

Fuel Poverty and Energy Efficiency

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Energy efficiency schemes over the next decade:

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- CERT (2008 - 2012)
- ECO (2013 - 2022)
- Green Deal (2012 - 2015)
- Green Homes Grant (2020 - 2022)

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We're not making great progress!

Some would even argue that schemes since 2009 have left us with:

- a loss in **public trust**,
- a loss of **industry confidence**
- no clear idea of how effective efforts have been at **reducing emissions and improving lives.**

Why?

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Resident engagement - Is it valued and resourced? Who holds responsibility for being a resident advocate?

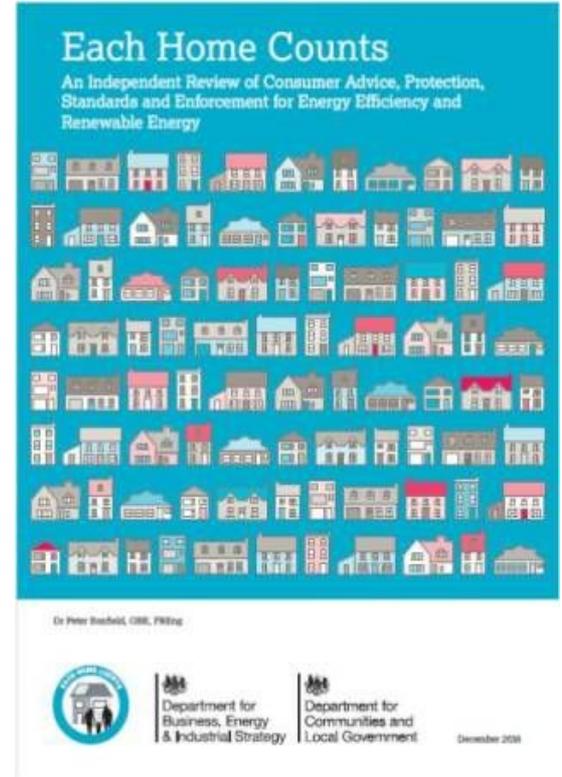
Concerns around quality



Credit: Passive House Plus Magazine,
<https://passivehouseplus.ie/news/health/disastrous-pr-eston-retrofit-scheme-remains-unresolved>

What is being done?

- Each Home Counts (2016)
- PAS 2030:17
- Trust Mark
- PAS 2030:19
- PAS 2035 (2019)



However

It's my guess that without addressing factors such as **limitations** around **government funding**, issues around **procurement** and the **construction industry**, and **problematic attitudes** towards those in poverty, we may not see the changes needed to build better and end fuel poverty.

This research can't answer all of these questions!

However....

Focus of Retrofit for All

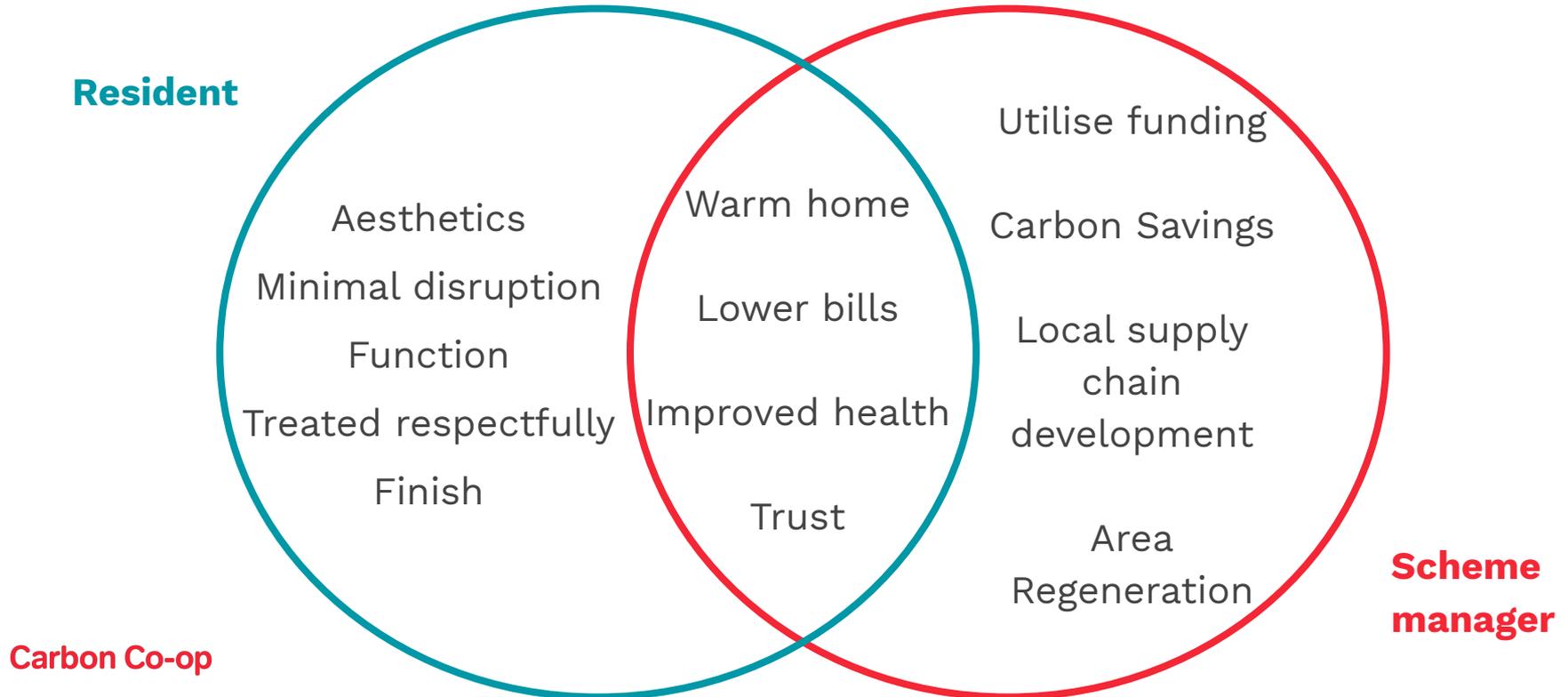
Rather than people fitting in around the needs and priorities of a funder or existing supply chain, we ask first:

What would a successful energy efficiency scheme look like from the point of view of a resident-client experiencing energy vulnerability?

By understanding this we can then look to make the funding environment, the supply chain and procurement approaches work for people.

Why People Centered?

Residents and scheme manager needs overlap



Engagement, behaviour change and performance gap



Residents can provide vital feedback on quality of works



It's just the right thing to do



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What matters to people?

**Participation, choice and
communication**

Participation and choice

Energisprong in Nottingham and the Wilmcote House Refurbishment in Portsmouth show that making space for participation through enabling choice leads tenants to becoming the biggest advocates for the project.

Having resident advocates is key to the success of schemes (now and in the future).



Credit: Retrofit to the Rescue (LSE, 2018)
<http://sticerd.lse.ac.uk/dps/case/cr/casereport120.pdf>

Choice increases engagement

Light bulb scheme initially only provided a few options. Picked the most common bulbs making it easier for scheme managers.

Feedback from advisors showed huge increase in value of scheme if they offered more choice and aimed to change all light bulbs in the house.

*“That person felt they got so much of a better service and were **far more likely to tell their friends** about it and say you should do this, it’s amazing, they just come round and change all your light bulbs and it’s really good quality. My house is much better lit now as well as being more efficient.” - Local Authority interviewee*

Consider how to be accessible

Wilmcote house (Portsmouth) refurbishment held open days with pilot flats rather than public meetings to be more accessible for tenants.

The whole design team were present at these open days and genuinely took into account tenant feedback on designs.



Be user-led in participation, choice and communication

Research highlighted the importance of not making assumptions that:

- Everyone wants to participate
- No one wants to participate
- Everyone will read the scheme brochure
- No one will read the scheme brochure
- People just want anything you can give for free
- What is of value to the resident-client is energy efficiency works, it might be that an outdoor tap, or a larger living space is more valued. (Respect what resident-clients value!)

Heating Controls - An Open Goal!

There are a lot of options out there!

By providing choice and being user-led here we can make a huge difference to the warmth and wellbeing of resident-clients.



Interesting article: Usability and Heating Controls,
Nic Combe,
<https://niccombe.wordpress.com/2013/01/21/usability-and-heating-controls/>

What matters to people?

Customer service

*Most of the issues I get with people is the customer service and communication element. It's one of the areas the energy efficiency industry **fails at the moment, dismally**. Most people are used to a better standard than in most of the areas where they procure services.*

- Charity worker interviewee

Installers and customer service

Installers play a key role, they are often **relied upon for engagement**, assessment, installation and handover, especially if a Local Authority (in a LA scheme) is under resourced.

Installers have direct contact with resident-clients and are key in people centred approaches.



What's the issue?

Missed appointments, delays, poor communication, **poor quality of works** and **loss of goodwill**.

Concerning attitude found in multiple reports, *'the tenant is getting things for free so shouldn't complain'* (Sherriff and Swan (2016), Benton et al (2019)).

‘Two-class system’?

*“...but the level and quality of work that went into if you were paying out of your own pocket for this work, or if it was being done through the scheme was quite marked, **you could stand back and almost notice the difference in quality.** From the big things to actual quality of work, down to slightly smaller things like **how the people were spoken to** who lived in the house, the effort that went into tidying up or being punctual or looking after and having respect for people's gardens...*

*...It was **almost like there was a two-class system** involved in what effort and what level of work went into the project and I've seen that with window projects, external insulation projects.” - Contractor interviewee*

Why important?

Leads to **drop outs**, difficult to reach those that most need support, **loss of goodwill**, **loss of trust**, **lose potential community advocates** and it makes it much **harder to engage** second time around.

Why important?

*“The impact [of poor customer service] is that they **drop out** of the scheme. It’s so complicated, and they have a **myriad of other things going on in their lives**. Money worries, health problems, maybe they live alone and don’t have anyone else to help them, maybe they’ve a family and they’re on zero hours contracts, all of this stuff compounds things... so [what we’ve heard people say is] **‘I’ve had enough**, I can’t be bothered with this anymore. You’ve wasted three months now, **I still haven’t got working heating**. What are you doing? Why have my appointments been cancelled three times now from the company from scotland?’ It’s all of that that compounds and they just drop out.”*

Why important?

*“And what happens to them? ... That’s a scary thought really. **Where have they gone** since they’ve cancelled from the scheme, **are they still living in a freezing cold house?** Have they died? Or you know.... I think, that is the big one, **you just lose them from the system, because they can’t cope**, they can’t cope with complicated things in their lives, because their lives are already chaotic and complicated as it is.”*

- Charity worker interviewee

Why is customer service so bad in the energy efficiency industry?

Not local?

- Many contractors operate at a regional or national scale. If contractor based at a distance, if they plan to do four assessments in the area on one day and one cancels, more likely to cancel all other appointments that day as not as cost effective to travel. The whole timing lengthens.
- Example of Local Authority who required use of local installers in tender bid.

Why is customer service so bad in the energy efficiency industry?

Size of firms and sub contractors?

- Many firms are large firms/Tier 1 contractors, who rely on sub contractors and they may have strong or weak sub contracting networks in the area.
- Sub contractors may be less invested in good resident-client relationships?

Why is customer service so bad in the energy efficiency industry?

So smaller is better?

- One interviewee noted that a smaller local firm undertaking ECO works in their area still had very poor customer service.

“A small installer we work with, they still cover a huge area that covers ECO. It’s not like they are trying to have really good relationships with a small community like a lot of businesses will do. So it doesn’t matter to them that those customers they discarded will be harder to engage with next time round.”
- Local authority interviewee

Why is customer service so bad in the energy efficiency industry?

Scheme complexity?

- A contractor who is also navigating a complex scheme will find simplistic messages that shifts the blame, although this is not always useful messages from a energy support/advice perspective.

“Because ECO is so complicated I completely understand why installers find incredibly simplistic messages as to why that is. And preferably try to communicate it in a way that it’s not their fault but the result of government grant funds and how they are distributed.” - Charity worker interviewee

Why is customer service so bad in the energy efficiency industry?

Customer relationship is not valued in scheme design?

- On ECO funded schemes resident-client satisfaction is not the aim of projects, installation of specific measures to get to a modelled CO2 reduction/increase in warmth. Is this where we go wrong?
- Schemes like the Wilmcote house refurbishment did value resident-client satisfaction, however the construction phase still experienced major issues. Is there something more endemic in the construction industry?

Top down attitude change in the supply chain?

“[Attitude towards tenants] comes from the top down, whoever's in charge it kind of filters through this, but you've got to remember that a lot of apprentices work on sites, young impressionable people that are working on this and it's their first job and they almost, it almost gets normalised to them and then they go through their work life like it and it just carries on, the cycle.” - Contractor Interviewee

What does impeccable customer service look like?

- Frequent and clear communication,
- Not assuming the client will read paperwork, calling them to check they understand the details.
- Making sure the appointments are kept.
- If there are changes calling up to explain why and what happens next.
- Hand holding and reassurance.

To be people-centred customer service needs to be **valued** and **resourced!**

'Resident-client' advocate?

- Single point of contact working on behalf of resident-client and with power and understanding of the process is needed!
- Does the Retrofit Coordinator fulfill this role?
- **Conflict of interest where Retrofit Coordinators are employed by contractors.**

Local Authority Resource and Control

- Projects in which LAs had staff capacity and financial resource in house were better able to support the whole process.
 - Dedicated resident liaison
 - In house assessors
 - Oversea technical aspects and sign off on works
 - Check in with residents after 12 month
- Also made requirements for use of local contractors in bid.
- Although some still struggled with customer service elements where contractors left at onsite stage to engage with resident-clients.
- Track record on customer service in bids? Could we go further?

What matters to people?

Quality and Trust

“I’d like to say something about quality is important to people but don’t think it is. People just want to be able to trust that someone can do it well.” - Local Authority Interviewee

Trust is more important than quality

By signing up to the scheme the 'resident client' has put their trust in the scheme to do what it has said it will do. Not many people question whether the works have been done well at the end as they have an expectation that it has been.

This makes it even more important that scheme managers do what they say they will do and **manage expectations** well.

Maintaining trust

It is important to **manage expectations** well particularly at the early stages of the customer journey. This will maintain good relationships, trust and save time down the line.

It is particularly important to communicate clearly (noting previous comments on user-led communication) as people in difficult situations will sometimes hear what they want to hear.

Value people in design of schemes

People centred in the design of schemes

Rather than treating people as targets for achieving X Co2 savings through loft tops for example....

*“Instead of that... lets walk into a house, whoever wants us to come in and talk to them about energy efficiency, **let's walk into those houses and [ask] ‘what can we do’ when we're in.**”*

- Local Authority Interviewee

People centred funding and policy environment?

- LAs and other social actors see the value of a people centred approach to energy efficiency schemes.
- Found that they were often fighting against the marketisation of energy efficiency measures in which resident clients are targets rather than people.
- Need further research on people centred:
 - funding approaches
 - procurement approaches
 - policy environment

The toolkit

Retrofit for All Toolkit

How to centre energy-vulnerable clients
in the design of energy efficiency schemes

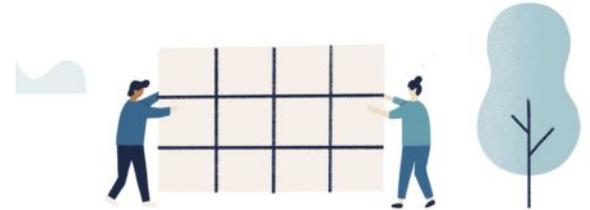
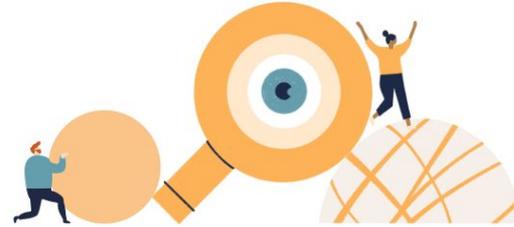
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electricity
north west



Structure

The toolkit looks at the project cycle of an energy efficiency scheme at the initial contact and sign up, survey, design, installation and post works stages.



Stage Three Design



<p>Resident-client experience</p> <p>What is important from the resident-client's point of view?</p>	<ul style="list-style-type: none"> To understand and trust what is planned. To have the opportunity to input into the design process. 	<ul style="list-style-type: none"> To be listened to and have their lived experiences and concerns taken into account. 	<ul style="list-style-type: none"> To receive communications that are clear and understandable. 	<ul style="list-style-type: none"> To be able to use and understand heating controls.
<p>Why important?</p> <p>Why are the factors outlined above particularly important when working with people experiencing energy vulnerability?</p>	<ul style="list-style-type: none"> Some people are less likely to engage with the scheme without access to the design process, others may have lives that are difficult to cope with and will not have capacity to engage in any design process. Both are in need of support and need to be catered for in how the design process is carried out. If resident-clients understand what measures are being installed and why they will be more likely to use new systems in an appropriate way, thus better meeting scheme goals. 	<ul style="list-style-type: none"> Meaningfully taking on board resident-clients lived experiences in the design phase leads to goodwill, buy in and trust. This can lead to resident-clients becoming champions for the project and increased engagement in follow on schemes. It will also support resident-clients ability to deal with disruption in the installation phase (to an extent). 	<ul style="list-style-type: none"> Resident-clients have a broad range of communication needs, ranging from those who will only read the front page summary of a report in clear and simple language (if anything), to those who will want lots of detail. 	<ul style="list-style-type: none"> Confusion and incorrect use of heating controls can have a big impact on the comfort and health of resident-client and the effectiveness of energy efficiency measures. Given the wide availability of varied heating controls this is an area in which choice could have a significant impact.
<p>Scheme design</p> <p>Taking into account the resident-clients' point of view, what should be considered in the design of the scheme?</p>	<ul style="list-style-type: none"> Organise events to share plans and gain input, make sure these events are engaging as possible. Bates et al (2012) and Groves (2019) (renovation of council estate tower blocks) found that public meetings were much less engaging than using open days to look around pilot flats and speak directly with the design team. 	<ul style="list-style-type: none"> Space should be made to engage with resident-clients early enough that their input can be meaningfully taken into account. 	<ul style="list-style-type: none"> Use participant co-production to develop communications, i.e. find out what communication style works best, visual, verbal, written. 	<ul style="list-style-type: none"> If heating systems are being upgraded, or if there is potential to change heating controls, allow staff time for supporting resident-clients to understand and pick the heating controls that will best suit them.

Stage Four

Scheme Manager Checklist

- There is a one point of contact for resident-clients throughout the build process.
- The resident-client liaison has the power to meaningfully deal with concerns.
- The resident-client liaison keeps regular contact with resident-clients using clear communication.
- Before works starts there has been good communication and expectation management around disruption.
- Mitigation processes are in place to take account of disruption during works, this has taken into account physical and mental health needs.
- Before works start the plan for dealing with snags has been communicated.
- There are plans to deal sensitively with mental health issues such as hoarding.
- Customer service proficiency and track record is included in the tendering process.
- Site workers have capacity and training to manage good resident-client relations.
- The resident-client is aware of the complaints process.
- Before works start there is clarity between the resident-client and the installer on responsibility for non 'build' aspects of the works including clearing spaces pre-works and what constitutes finished works.
- Good communication during the build phase around access requirements and appointments.
- Any changes to the work schedule are clearly communicated with reasons given for delays.
- Reports of problematic behaviour of either party (resident-client or installer) are investigated and resolved adequately.
- There is an appropriate timeframe for finishing works (avoiding artificial deadlines).

Developing research area

This work is not intended to be static but to be added to and evolve with continuing research.

We would like to feed in more direct resident-client experience into the toolkit.

If you would like to contribute to this research please get in touch via info@carbon.coop.

Warm & Safe Homes (WASH) in Fishwick, Preston

Filipe Amarante, National
Energy Action

Questions and Answers

Please use the raise hand function and the chat box to ask your questions.

Toolkit feedback

We will split you into
breakout rooms for 15 mins.

Thank you



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