

Retrofit for All

How to support resident liaison officers in retrofit

A guide for senior managers in registered providers



**Carbon
Co-op**

About this guide

This guide is part of the 2-year Energy Redress Scheme funded project "Retrofit for All" (Carbon Co-op, no date, a) and builds on Carbon Co-op's original toolkit (Kellay, 2021). The content has been developed based on Carbon Co-op's experience delivering retrofit schemes (Carbon Co-op, no date, b), the Retrofit for All service design process (Kellay, 2025), including six participatory stakeholder workshops and interviews with key individuals and organisations. It is one of several outputs designed to address barriers to people-centred retrofit and should be viewed alongside the two case studies on Broadacres Housing Association¹.

This guide has been written for all those interested or involved in the successful delivery of social housing retrofit projects, including senior managers in asset management and sustainability teams. Main contractors and other delivery partners (DPs) may also find content helpful.

Carbon Co-op is a Manchester-based community benefit society and a not-for-profit community energy organisation that helps people and communities to make the significant reductions in energy and carbon emissions we need to tackle climate change.

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¹ [Click here to link to webpage with resource](#)

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Definitions

- Registered providers** We use this term to indicate housing providers which are registered with and regulated by the Regulator of Social Housing. As such, they are required to meet set standards for providing affordable and social housing.
- Delivery partners** We use this term to indicate contractors involved in the delivery of retrofit, who work alongside RPs and tenants. Generally, these include designers (e.g, architects or surveyors), installers (e.g, a building contractor), and retrofit coordinators.
- Main contractors** Main contractors, sometimes referred to as principal contractors, are the key organisation responsible for delivering construction projects. They often use subcontractors to deliver parts of the work.
- Tenants, residents, customers** Across the sector, many terms are used for the people who live in social housing or who are part of the communities where social housing is located. These include residents, tenants, and customers. Throughout this project, we use these terms interchangeably.
- Resident liaison officer** The terms resident liaison officer, customer liaison officer, and tenant liaison officer are often used interchangeably. For this guide, we are using 'resident liaison officer'.

Introduction

Resident liaison officers (RLOs) play a critical role in energy efficiency projects. They are the golden thread between tenants and both the registered provider (RP) and the main contractor. Despite this, many RLOs are under-resourced and under pressure to meet tight delivery timescales, hindering genuine tenant engagement. We hope this guide and our accompanying case studies can help shift this dynamic.

Many lessons have been learnt through Wave 1 (Department for Energy Security and Net Zero (DESNZ), 2024a) and Wave 2 (IFF Research et al, 2025) of the Social Housing Decarbonisation Fund (SHDF)², and the sector is starting to understand that RLOs are an essential part of making energy efficiency projects deliverable³.

This guide aims to provide guidance and prompt consideration to support senior managers to centre tenant experiences in the design and delivery of retrofit. We do not give specific recommendations, as every provider, contractor and community is different.

This guide is not about resident engagement techniques or strategies. For further support on this, see section 7. For more on people-centred retrofit, see (Radcliffe et al, 2025).

Note on diverse practices

RPs vary in their use of RLOs, whether in-house or contracted. RP approaches can be influenced by their size and stock location. Organisational culture is also significant in influencing tenant engagement practices (Tenant Participation Advisory Service (Tpas), 2024). For instance, Broadacres' customer-focused culture meant that it was obvious to the senior manager that they would use in-house RLOs to enable greater control over the customer experience (Dewfield, 2025a).

Conversely, some RPs opt to outsource all RLO functions to the main contractor. While good resident engagement practices from contractors will benefit tenants during the installation phase, the absence of early resident engagement poses challenges for both the RP and the main contractor.

As noted in SHDF Wave 2.1 evaluation (IFF Research et al, 2025), early engagement before the installation phase is key. This approach also leaves tenants with no trusted point of contact post-works, leading to poor outcomes (Radcliffe et al, 2025). We would advise against relying solely on contractor RLOs for all resident engagement activities.

Some RPs use a hybrid approach, using both in-house and contractor RLOs at different points in a project. Collaboration with trusted main contractors and other delivery partners (DPs) is crucial for a smooth tenant experience during the installation phase (see section 3).

Beyond considering who RLOs are employed by, the service design process (Kellay, 2025) has underscored the vital role of pre-existing, positive relationships between tenants and RPs as a critical prerequisite for the smooth execution of retrofit projects⁴.



1. Stages of a retrofit

Below, we examine the project stages, the primary responsibilities of the RLO, and considerations for managers. Section 8 provides information on where to find advice on engagement methods.

Customer journey stage ⁵ (project stage)	RLO tasks	Manager considerations
Engagement Planning (strategic & technical planning)	RLOs prepare and share engagement strategies which include resident/community insight.	Hire RLOs early or retrain from past projects. RLOs feed into planning. Early resident awareness is included in engagement plans. RLO training opportunities (see section 3).
Awareness (feasibility & funding)	Early tenant engagement to: inform tenants about potential works subject to funding, highlight retrofit benefits (RISE, 2024a), address concerns, and identify those needing extra support.	Engage residents early by hiring RLOs promptly.
Launch (feasibility & funding)	Inform tenants of upcoming work, project benefits, and manage expectations (RISE, 2024a).	Resource RLOs for a range of engagement activities, including in-person and door-knocking ⁶
Design (surveys, technical design & procurement)	Coordinate surveys, engage tenants in design, plan for tenants with additional support needs, and prepare tenants for installation (RISE, 2024a).	Use the procurement stage to build trust with your main contractor ⁷ , and involve the RLO manager or RLOs in this process ⁸ .
Installation (installation)	Serve as the primary tenant contact, scheduling appointments, providing updates, and assisting tenants through works. Hold contractors and tenants accountable for commitments around access and behaviour, facilitate complaints, liaise with main contractor and RP teams ⁹ . Conduct satisfaction surveys throughout delivery.	Enable regular communications between RLO and site teams. Empower RLOs with a budget to problem-solve tricky issues. Ensure the complaints process runs smoothly and tenant satisfaction is prioritised ¹⁰ .
Handover (post-retrofit support & monitoring)	RLOs conduct handover visits (if appropriate). Share a user-friendly guide through a range of methods: digital, print, and in-person/online meetings (RISE, 2024a). Provide bespoke tenant communications as needed. Ensure proper system use and provide ongoing support for issue reporting.	Coordinate snagging and handover between the main contractor and RLOs. Allocate sufficient budget and time for a range of methods of handover engagement.
Post-Works (evaluation, feedback, and long-term planning)	Post-retrofit evaluations, share feedback with tenants (RISE, 2024a). Share induction packs with new residents (RISE, 2024a).	Plan and resource evaluations involving tenants, RLOs, contractors, and RP teams. Apply lessons learned to future retrofit projects.

² Now the Warm Homes: Social Housing Fund (WH:SHF).

³ Latest government guidance (DESNZ, 2024b) acknowledges the impact of poor engagement on programme delivery. In addition, the value of good resident engagement is seen as so critical that some main contractors have created new roles such as Customer Experience Managers, who oversee strategic aspects of resident liaison within their businesses.

⁴ See Tpas. (2023) for more information on building trust with tenants.

⁵ The customer journey stages have been borrowed from the Retrofit Information, Support and Expertise (RISE) Resident Engagement Toolkit (RISE, 2024a)

⁶ Conversations with contractor experience managers show that the most successful engagement events involved the RLO 'pounding the beat' ahead of an in-person engagement event.

⁷ See section 3 for more.

⁸ Conversations with Broadacres senior manager and main contractor customer experience manager.

⁹ For further insight on Broadacres' approach see (Dewfield, 2025a).

¹⁰ Ibid.

2. Recruitment & training

This section covers RLO hiring timelines, ideal RLO traits, and training resources.

When to hire an RLO

Challenges around funding timelines can lead to hiring RLOs too late to undertake critical early planning and tenant engagement (see section 2).

This sets the programme 'on the back foot' from the start. Integrating retrofit into long-term asset management strategies justifies sustained investment in RLOs, independent of funding cycles. Benefits of this are showcased by Broadacres' permanent RLO team (Dewfield, 2025a, 2025b).

As the WH:SHF has increasingly emphasised the importance of good engagement (DESNZ, 2024b), having embedded and effective approaches to engagement could mean a greater likelihood of securing government funding and ensuring smooth delivery.



Values, personality, skills and experience

This table can aid HR and relevant teams in developing RLO job descriptions.

VALUES AND PERSONALITY	
A 'people person', able to build rapport	Someone outgoing, personable, empathetic, patient, and good at understanding people.
Trustworthy & non-judgemental	Building tenant trust is crucial, requiring a non-judgemental, patient approach that respects diverse views and circumstances.
Honest & direct	Ability to be honest and direct with tenants and contractors. Able to hold difficult conversations and advocate for tenant concerns when conflicts arise.
Outcome/solution-focused	Someone who focuses on desired future outcomes and opportunities, rather than dwelling on problems.
Resilience	Resilience can help RLOs adapt and thrive through challenging contexts, maintaining personal wellbeing.
SKILLS AND EXPERIENCE	
Good communicator	Be able to liaise individually with residents, considering diverse access needs (e.g., visual impairment, deafness, ESL, religious, and disability), and facilitate communication among residents, RP, and site teams.
Work across teams	Ability to work with all parties: the asset management/sustainability team, other RP teams, tenants, contractor site teams and suppliers.
Technical learning & communication	Can learn technical concepts and explain them simply. No prior energy efficiency knowledge is required; training should be provided by the RP/DP; the ability to learn and communicate is key.
Understand community & life experience	Ideally, RLOs are recruited from within the community, potentially tenants with retrofit experience (Carbon Co-op, 2025). Candidates should empathise with challenging life circumstances and may have experience in people-facing roles like social work, care, police, education, social housing or the charity and community sector.
Mediation / conflict resolution	At times, RLOs may need to mediate between a resident and other parties. A candidate with conflict resolution experience will be well placed to support all parties.
Understand diversity and accessibility	Address diversity, accessibility, and vulnerability issues, relaying them to the RP and DPs. Experience in trauma-informed approaches is beneficial.

Training

Collaborate with your RLOs to determine training needs for increased buy-in and better outcomes (Dewfield, 2025c). One contractor found their RLOs requested an "Introduction to Retrofit" course when consulted, which led to more active participation than a mandatory course.

While some training providers are listed below, we cannot vouch for their quality, and such lists quickly become outdated. Ask your teams about their interests and research available courses.

TOPIC	TRAINING PROVIDER
Retrofit	There are many retrofit training organisations. The National Retrofit Hub (NRH) have produced a Qualifications & Training Map (NRH) which provides an up-to-date list of retrofit courses.
Resident engagement	<p>RISE for regular resident engagement bootcamps and other masterclasses. (RISE)</p> <p>Housing Quality Network (HQN) for a range of courses, including resident engagement. (HQN)</p> <p>Tpas training and events on resident engagement, equality, diversity and inclusion and other key topics. (Tpas)</p> <p>Supply Chain Sustainability School (SCSS) have a number of retrofit courses, including one on people and retrofit. (SCSS)</p>
Wider skills	<p>Shelter run safeguarding, handling challenging situations, mental health awareness and other training specifically for the housing sector. (Shelter England)</p> <p>Housing Diversity Network (HDN) for a range of training on equality, diversity, inclusion and accessibility. (HDN, no date)</p> <p>Mental Health First Aid England (MHFA) for a range of mental health courses. (MHFA)</p> <p>National Energy Action (NEA) for training on energy advice, fuel poverty, energy awareness and more. (NEA)</p>

3. Procurement

Procurement is a critical part of retrofit schemes and presents many opportunities. This section shares insights from contractors and RPs we have spoken with on using procurement to enable good resident liaison.

Deciding whether to manage resident liaison in-house or outsource the RLO role requires careful consideration (see section 2).

In-house RLOs offer many benefits through increased control over the resident experience. If in-house is not an option, successful resident liaison outcomes are achievable through a combination of in-house and outsourced RLOs (for the onsite stage).

If managers intend to fully rely on main contractor RLOs, consider how to ensure early tenant engagement and post-works support. It is important to consider the approach to customer experience throughout the supply chain, not just the main contractor, to ensure a consistent customer journey¹¹.

¹¹ In addition, integrating retrofit works with main asset management upgrade programmes simplifies the process for tenants and improves management, especially for RLOs working for main contractor.

In this section, we explore opportunities offered by partnerships, aligning expectations, and some top tips.



Long-term partnerships

RPs and main contractors talk of the value of long-term partnerships, based on shared values, trust and open and regular communications.

These partnerships can be formed through involvement in procurement frameworks or partnering agreements (see case study below). In both cases, taking the time to set expectations around resident engagement, adjust engagement standards within frameworks, and build relationships is key.

Case study: partnering agreements

[Stockport Homes developed a relational contract with B4Box](#) using support from Anthony Collins Solicitors, a framework which set out specific social and environmental goals that both organisations wanted to achieve through the procurement and delivery of services.

Such an approach can be extended to incorporate resident liaison and, in turn, necessitate the use of RLOs and other measures to deliver these goals¹².

¹² Further reading (Macfarlane and Cook, 2002).

Aligning expectations

It's crucial for RPs to clearly define their resident engagement goals and values and compare them with those of their prospective contractors. If the main contractor leads resident engagement without a detailed discussion and agreed specifications, key RP resident engagement objectives may not be met.

It's important to acknowledge the diverse nature of contractors, DPs, and RPs. Some contractors inherently value treating residents with respect and ensuring a positive experience. As Aileen McDonnell, CEO of construction company B4Box, explains, "All parties should consider the tenant a customer".

Other companies prioritise smooth project delivery over tenant experience and accessibility. This highlights the critical importance of ensuring your goals and values are aligned, helping you find the right delivery partner.

A contractor who shares your values and aims regarding resident engagement will work collaboratively towards your shared goals. Building relationships is key, but you can also establish these expectations through your tendering process or by setting framework standards.

Tips for aligning expectations:

- Review contractor RLO job descriptions and training plan. Do they match your expectations?
- Clearly define the regularity of tenant engagement. For example, the number of appointments and daily tenant check-ins.
- Clarify complaint handling responsibilities, ensuring alignment with resident engagement goals¹³.
- Ensure contractors demonstrate positive attitudes towards tenants, with a zero-tolerance policy for stigmatisation.
- Consider mandating reporting of unusual tenant interactions, including safeguarding or vulnerability concerns.
- Consider mandating reporting of tenant concerns around any other issues, e.g. repairs and maintenance.
- Require collaborative problem-solving to ensure all willing tenants¹⁴ can access the scheme.
- Insist on 'toolbox talks' covering resident engagement, equality diversity, inclusion and, accessibility (EDIA), and tackling stigma.
- Set expectations for community engagement, including using community spaces¹⁵, restoring green areas that have been used as site offices, engaging with community groups, and encouraging local recruitment.

Three top tips

1. Involve tenants in procurement, this sets the scene¹⁶ for contractors on the value of tenant opinions to your organisation¹⁷. Tenants offer unique insights that can help you assess contractor behaviour, especially during interviews. This participation can range from developing briefs to monitoring performance¹⁸.
2. Social value commitment can directly support the resident liaison officer (RLO) role by providing flexible budgets to address tenant issues. Consider a monitoring strategy for social value commitments to ensure their delivery¹⁹.
3. High quality to cost weighting, and a good portion of the quality aspect on customer experience will enable RPs to pick contractors who align with their resident engagement goals²⁰.

¹³ See our case study on Broadacres' customer liaison officers (Dewfield, 2025a) for more on customer-focused approach to complaint handling.

¹⁴ See note on refusal rates in section 7.

¹⁵ Take care to work with communities and ensure your activities give back rather than exploit.

¹⁶ The importance of 'scene setting' is discussed in our case study on Broadacres' procurement approach (Dewfield, 2025b).

¹⁷ For more on involving tenants in procurement see (Local Government Association and Tpas, 2019)

¹⁸ Tpas provides relevant training, Tpas (2025)

¹⁹ The new Procurement Act (2023) places a clear duty on contracting authorities to maximise public benefit, meaning that the monitoring of social value commitments is a legal expectation. As such, making a monitoring strategy will help you stay ahead of compliance requirements (as well as ensuring social value promises relate to real life outcomes). PPN002 is one common model to use see Cabinet Office (2025).

²⁰ Broadacres have a 70/30 quality to cost weighting (Dewfield, 2025b).

4. Supportive environment

This section examines how to create a supportive environment for RLOs, focusing on their networks, team/organisational culture, information management, and handling difficult situations.

The issue of poor quality resident engagement in social housing is systemic and could be described as a management problem, affecting RPs and their supply chain.

We have identified the culture of RPs and DPs as a fundamental aspect of people-centred retrofit (Radcliffe et al, 2025).

While RLOs have a key role in being the liaison point, they will be more successful if they are operating in a customer-focused culture (Dewfield, 2025a).

Working in and across teams

RLOs need to be embedded in and across teams to be able to carry out their role. Successful retrofit projects rely on clear communication and awareness across the RP and main contractor teams. The Northern Housing Consortium's (NHC) Self Assessment Retrofit Checklist (NHC, no date) highlights numerous RP job roles involved in retrofit projects.

Crucially, responsibility for customer or resident experience should not sit with the RLO alone, but should be a shared responsibility of the whole team, with the RLOs taking a lead in ensuring resident concerns are fed into the project team.

RPs with good practice in this area advise that RLO sit in regular projects or update meetings between the RP and main contractor, with a standing agenda item on resident issues.



Working in and across teams (continued)

Other key connections for RLOs identified through the service design process include:

- **RP staff managing tenant information:** To share tenant information and data on vulnerability and access, e.g. childcare and shift work impacting tenant availability²¹.
- **Main contractor site teams:** For regular communication to ensure the programme takes into account tenant situations²².
- **RP contact centres:** To understand retrofit programs and direct tenant enquiries appropriately²³.
- **Housing officers:** Source of historical tenant information²⁴ and in-person early engagement advice.
- **Repairs and maintenance teams:** RLOs may need to coordinate with repairs and maintenance to ensure a consistent understanding and information sharing regarding new technology.
- **Product suppliers:** For example, a heat pump supplier may speak with tenants, before, during or after installations to explain the heat pump, build trust and support user engagement²⁵.

Information management

An effective customer relationship management system (CRM) is crucial for inter-team communication within RPs. RLOs and asset management/sustainability teams need access to contractor and supplier data (e.g. Switchee's monitoring data can flag damp, mould, or heat pump misuse).

This data helps RLOs support tenants post-retrofit. RP managers must plan information sharing and access across contractors, suppliers, and tenant-facing roles, taking into account GDPR issues.

Culture

A tenant-centred culture, driven by senior leadership, is crucial for smooth retrofit delivery and high tenant satisfaction, as shown in the Broadacres case study. Conversely, a lack of this culture leads to increased refusals and engagement barriers (Radcliffe et al, 2025).

Support to manage tricky issues

RLOs encounter many issues impacting tenant engagement in retrofit programs, including: childcare, pet care, age, illness, hoarding, mental health and many others.

Our research shows RLOs have overcome these barriers in many ways, including offering temporary storage, sitting with residents during works, and temporarily rehousing vulnerable individuals. RLOs need to be able to identify safeguarding²⁶ and vulnerability issues and signpost support accordingly. RLOs also need a budget and senior management support to offer personalised assistance to tenants²⁷.

A majority of RLO time may be spent on a minority of tenants to ensure all feel the benefits of retrofit. Senior managers and contractors can foster this "leave no one behind" approach (Dewfield, 2025a; 2025b).

²¹ Interview with Broadacre RLO revealed tenants may have been dismissed as unresponsive without detailed tenant knowledge being shared.

²² See Broadacre RLO case study for more (Dewfield, 2025a).

²³ Interview with Broadacre RLO and discussions at service design workshops revealed importance of good connection of RLO with contact centred.

²⁴ Interview with Broadacre RLO.

²⁵ Learning from Project Heat Pump (Carbon Co-op, no date).

²⁶ Safeguarding training is recommended, see section 3.

²⁷ See comment in previous section around utilising social value commitment to access additional budget.

5. Embedding equality, diversity, inclusion, and accessibility

RLOs, as a frontline role, are crucial to recognising and tackling equality, diversity, inclusion, and accessibility (EDIA) issues in retrofit projects.

Our participatory tenant research found that one tenant had felt excluded from retrofit schemes due to racism (Duffy et al., 2025). It is acknowledged that this is a loaded statement; however, some communities have experienced historic and present-day prejudice (due to gender, class, race, religion, disability and more).

Therefore, trust building with under-represented groups is a necessary part of the RLO's role, and attention needs to be paid to ensure this work is done well.

Considerations:

- **Recruitment:** Enable and support RLO job applications from communities representative of tenants. Actively encourage applications from underrepresented groups²⁸.
- **Training:** Gain buy-in from staff for EDIA training²⁹.
- **Toolbox talks:** Integrate EDIA toolbox talks into DPs' regular meetings (SCSS, no date, b).
- **Senior management support:** Senior management's commitment to EDIA shapes and supports RLOs to enact their responsibilities.
- **Monitoring and reporting:** Implement systems to monitor EDIA metrics and tenant experience (RISE, 2024b).



²⁸ Representation can be a powerful way of bringing the viewpoints of under-represented communities into an organisation. For more see our tenant recruitment guide (Carbon Co-op, 2025)

²⁹ See section 3 for more on training providers.

The RISE toolkit on embedding equality, diversity and inclusion in housing retrofit is a valuable resource (RISE, 2024b).

6. Measuring value

Managers seeking to understand RLO impact, justify engagement, and support permanent RLO roles can use this section's evaluation metrics to demonstrate RLO value³⁰.

³⁰ See RISE monitoring and evaluation strategy for more on developing a wider strategy (RISE, no date, b) and the evaluation section of the Heartwarming Homes toolkit for more on measuring resident engagement (Heartwarming Homes, 2023).

While we have suggested some data points and highlighted their value, it is important to be cautious in making direct causal inferences from this data about the value of the RLO. Tenant experiences and retrofit projects are both complex!

Do not overly rely on quantitative metrics; individual stories and qualitative methods like interviews are also effective in demonstrating change and impact.

Refusal rates

Data: Number of tenants refusing retrofit work, reasons for refusal, enablers suggested, collected periodically³¹.

Value: Evidencing changes in refusal rates (alongside other metrics below) to demonstrate how the RLO role may have had a longer-term impact.

Acceptance after initial reluctance

Data: Number of tenants accepting works after initial reluctance in the current programme, reason for initial reluctance, RLO enabling suggestion/reason for acceptance.

Value: Tenant acceptance of retrofit due to direct RLO engagement.

Acceptance after historic refusal

Data: Number of tenants accepting works after refusal in the previous programme, previous reason for refusal, reason for acceptance.

Value: Change of tenant opinions charted over time, with evidence of RLO interventions, indicates RLO's longer-term impact.

Post works tenant satisfaction (required by PAS20235)

Data: Satisfaction data collected as properties are completed throughout the programme.

Value: Helps early identification and resolution of issues, which could be advocated for by RLOs. Also allows each customer's experience to inform delivery, and lessons are learnt for the remainder of the programme.

Note: More effective if an independent organisation or RP collects data.

³¹ Data collected over numerous rounds or waves of funding/programme.



Tenant satisfaction (not required by PAS2035):

Data: Satisfaction collected 1 to 2 years post-works.

Value: Provides a comprehensive view of program impact and post-works engagement.

Tenant rating of RLO

Data: Tenant feedback on overall satisfaction with RLO. The RLO support on: understanding of retrofit, preparedness for works, support with concerns and additional needs, and handover.

Value: Direct feedback helps define RLO value and informs resident engagement.

Note: Consider the appropriateness of the RLO collecting data. Consider naming the RLO in the survey question³².

Word of mouth/informal tenant opinions

Data: Positive/negative mentions between tenants and their friends, neighbours and fellow tenants, testimonials.

Value: Indicates success or need for re-evaluation of resident engagement and broader observations about the acceptance/reputation of retrofit among tenants as a result of existing schemes.

Note: Collecting data online as well as in-person will need to be considered carefully. Online data could be skewed towards vocal negative voices. Work with your frontline staff to create a strategy for collecting data.

Contractor feedback

Data: Testimonials, comparison of planned programme costs vs final costs where available.

Value: Demonstrates the financial and programmatic value of RLOs.

Note on refusal rates and complaints

Solely focusing on lowering refusal rates as a metric can have unintended consequences in driving RLOs to pressure tenant acceptance. Instead, understanding reasons for refusals, finding solutions and recording acceptances in subsequent waves offers better insight into RLO success.

Similarly, a low number of complaints doesn't automatically signify tenant satisfaction, especially if tenant-landlord relationships are poor or confidence in repair processes is low, leading to under-reporting.

³² It is useful to name the RLO to help tenants understand who they are giving feedback on. However this may or may not be possible due to scale of RP or main contractor.

7. Signposting

Resident Engagement Toolkit (RISE, 2024a): Guidance for high-quality retrofit outcomes.

Embedding Equality, Diversity and Inclusion in Housing Retrofit (RISE, 2024b): Improves EDI in retrofit via best practice in operations, engagement, procurement, and project selection.

Energy Solidarity Toolkit: Practical ways for energy communities to tackle energy poverty, Community Energy for Energy Solidarity (CEES) (CEES, 2024): Helps energy communities integrate solidarity (RLOs may find sections 2 & 5 useful).

Social Housing Tenants' Climate Jury: The Self Assessment Retrofit Checklist (NHCa, 2023): Applies Social Housing Tenants' Climate Jury SHTCJ recommendations to retrofit, mapping them to job roles and offering tips.

Retrofitting existing homes: 'A Practical Toolkit Towards Net Zero' (Baily Garner, 2022): Contractor views on resident-centric retrofit to minimise dropout, linking business plans with engagement and social value.

Retrofit for All Toolkit (Carbon Co-op, Kellay, 2021): Highlights resident importance and considerations throughout the energy efficiency project cycle.

Heartwarming Homes: A toolkit to engage residents in energy efficiency improvements (Heartwarming Homes, 2023): Covers tenant communication, overcoming barriers, and providing shareable resources. Evaluation section with methodology and metric examples.

Reaching Underserved Populations Toolkit (US) (Xcel Energy, 2019): Step-by-step guide for engaging underserved communities; not retrofit-specific.

Midlands Retrofit Toolkit (Retrofit Academy and Midlands Net Zero Hub, 2022): Integrates PAS2035, detailing role influence on customer journey and addressing resident questions.

Toolkit for Social Housing Landlords to engage residents in retrofit (Net Zero Building Centre): Videos and quizzes on building trust and effective communication.

The Retrofit Toolkit: Helping Local Authorities to Kickstart Deep Retrofit (The Retrofit Academy): Introduces PAS 2035 and roles, with case studies.

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“If I was to give advice to other housing associations in terms of delivering retrofit, it would be to focus on the customers and take that customer-centred approach. Don't be nervous about taking control of that. I think as landlords we deliver that better than any contractor ever could. So taking control of that and delivering it in-house, you'll get all sorts of added benefits' ”

- Helen Ball, Broadacres Housing Association

[Click here to hear more from Helen.](#)

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A guide for senior managers in registered providers

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