

“We Work for Them”: The Culture Behind Broadacres’ Retrofit Success

Broadacres’ customer liaison officer team builds buy-in, not barriers.

Carbon Co-op's "Understanding Experiences" research identifies that organisational culture and the Resident Liaison Officer (RLO) role are key to people-centred retrofit.

Broadacres' customer-centric approach, particularly their use of in-house Customer Liaison Officers (CLOs), serves as a leading example for social housing retrofit schemes, offering valuable insights for Registered Providers (RPs) aiming to improve resident engagement. We interviewed a senior manager, a sustainability officer and two CLOs from Broadacres to find out more.



Customer speaking with Broadacres CLO at community event. Credit: Broadacres

Context

Broadacres is a not-for-profit housing association with more than 6500 homes operating in North Yorkshire and the North-East, covering market towns, coastal communities, and rural areas. As part of the Social Housing Decarbonisation Fund (SHDF) Wave 2, the organisation delivered retrofit works to over 400 homes. And in WH:SHF Wave 3 they are currently retrofitting a further 640 homes over 3 years.

The case study is part of the Toolkit: Resident Liaison Officer Role, and is accompanied by a companion case study that dives into procurement, and a guide for senior managers.



Across the social housing sector, retrofit programmes are often affected by refusals, difficulty gaining access, scheduling issues, and customers being nervous about the upheaval. Our conversations with staff at Broadacres have shown us how they largely avoid these problems by putting customer engagement at the heart of their delivery model.

Broadacres has developed a customer-focused approach to retrofit that prioritises long-term relationships, local knowledge, and consistent communication. This case study examines how that approach is embedded through organisational culture, delivered by a dedicated in-house CLO team, and supported by collaborative relationships with contractors. Together, these elements enable more residents to say 'yes' to works, reduce the risk of complaints or disruption, and support delivery at scale. The result is a model where retrofit is not only completed efficiently, but is welcomed by the people living in the homes.

Customer-focused culture

“The question that [the senior manager] always gets challenges on by the Board is ‘So what? So what does that mean for our customers?’”



Broadacres CLO speaking with resident in their home. Credit: Carbon Co-op

Broadacres puts the customer first. As one CLO put it, “Its is all about the customer. We are very customer focused.” Another described the mindset across the organisation:

“They literally are our customers...there’s kind of this ethos that we work for them and they are the most important part of the business.”

Leaders model this ethos every day, described as,

“Not afraid to do the hard stuff...she will literally get her hands dirty and I think that’s such a key driver behind the success.”

This approach extended into recruitment and staff development. Recruitment into the CLO team is based on demonstrating empathy, patience, and commitment to doing the right thing. Staff described the importance of hiring people who, “really care about the customers” and who will go out of their way to “fight the customer’s corner.” This shapes a consistent approach across the team and helps embed the organisation’s customer-first ethos in everyday delivery.

You can see this in practice in how Broadacres responds when things go wrong. The **complaints progress was described as “too important” to outsource**, with everything being handled in-house to maintain hard-earned customer trust. Core to their values-led way of working is their clear expectation that complaints to be dealt with immediately, that residents should be treated with dignity, listened to and believed, and always given the benefit of the doubt. The CLO team have the autonomy and budget to respond quickly and fairly as they see fit, including offering compensation or practical support if needed: “We’ll give anything out or pay for anything upfront ourselves if necessary.”

Rather than seeing complaints as a sign of failure, staff viewed them as a signal that the relationship needed attention, and that delays or defensiveness cause lasting damage:



“It’s important to know you will get complaints...try not to be discouraged by that.”

In-house CLO model

At Broadacres, the CLO role is seen as essential to delivering a great retrofit scheme. Backed up by a strong internal culture, supportive management, and streamlined systems, CLOs are trusted to act independently, take responsibility for resident relationships, and adapt flexibly and quickly to individual needs. They also manage their own diaries, maintain their own relationships, and are encouraged to take the time they need to do things properly- managers “let them get on with it” because they recognise the value of the one-to-one relationships and trust that CLOs have built over time.



Broadacres CLO speaking with customer at a home visit. Credit: Broadacres

CLOs provide wide-ranging support to help residents navigate retrofit works, responding to people’s needs: house-sitting for anxious residents, offering lifts to appointments, arranging temporary accommodation during works, or simply spending time explaining technical aspects in ways that feel manageable and reassuring. Being in-house also means they are able to build trust over time, especially with those who may initially be unsure or reluctant to engage- even returning to speak with residents, year after year, until they are ready.

CLOs also challenge contractors when needed. If the contractor behaviour falls short, for example, not respecting someone’s home or routines, the CLO steps in. One manager described this as “**representing the customer,**” particularly in situations where residents may not feel confident asserting their own boundaries. Because the CLOs are known, consistent and trusted, they can spot problems early and resolve them before they escalate. These relationships often extend beyond the retrofit programme.



The impact of the CLO model is seen in both delivery outcomes and resident experience, leading to lower refusal rates, fewer complaints, and a smoother, less stressful process for both contractors and managers.

“
The organisation’s most recent SHDF project was completed ahead of schedule.
”

Interviewees credited the CLOs with resolving issues that might otherwise have slowed progress or led to disengagement.

As CLOs work alongside, and sometimes even onsite with, the delivery team, they can share practical advice and context with the delivery team, such as why a customer hasn’t answered their phone or what adjustments need to be made on the day. They help contractors understand that small actions, like wearing shoe covers or arriving five minutes later to suit a resident’s routine, can make a significant difference to their and the customer’s experience. Customers who are treated with respect are more friendly, open, and forgiving. So, this way of working improves customer experience and reduces friction in the retrofit process for the whole delivery team. Over time, CLOs also reported fewer call-backs and less confusion about installed measures: “We don’t get customers ringing saying ‘oh the heat pump’s not worked since it was installed”, as they feel confident knowing where to go for support and that their concerns will be taken seriously.

Contractors also came to see Broadacres as a place where retrofit projects ran more smoothly than elsewhere. One CLO remembered being told by the contractor team, “**You are a breeze compared to other contracts we’re on.**”

“
So, rather than slowing things down, this customer-focused model was credited with speeding up the process.
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Long-term impact

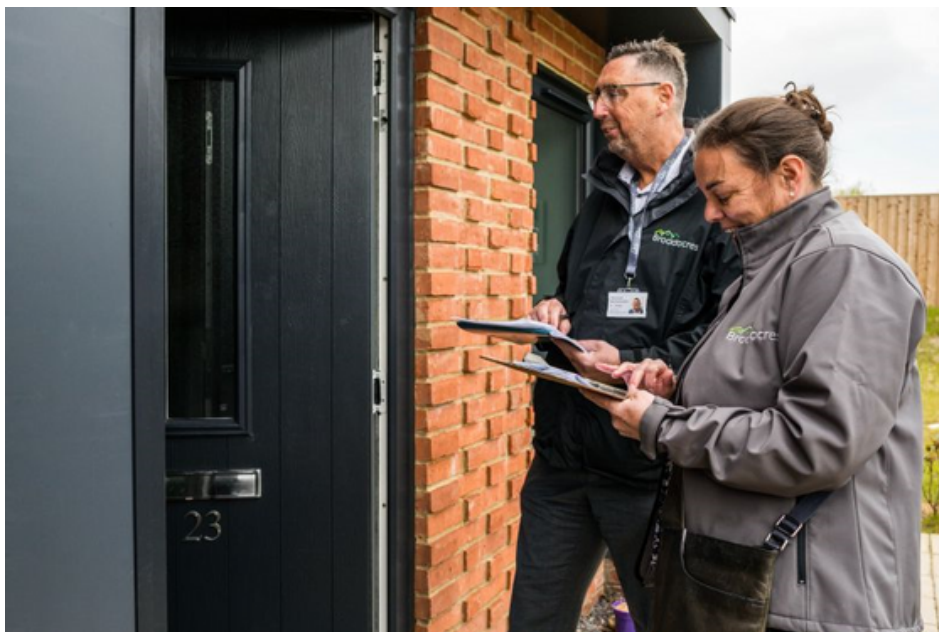
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We're not just about getting through properties... we want customers to have conversations over their garden fences.-

Senior Manager

”

Interviewees reflected that Broadacres' approach to retrofit — particularly the decision to invest in an in-house CLO team — has delivered sustained, long-term benefits for the organisation and its residents. While CLO roles are sometimes present in delivery contractor teams, Broadacres made the unusual decision not to use RLOs offered by the main contractor. Measurable results have supported this investment: “We pay them an annual salary...but we've got the evidence to show that having them in-house has reduced refusal rates by this much.” – CLO Manager.



Broadacres CLO and staff member visiting customer home. Credit: Broadacres

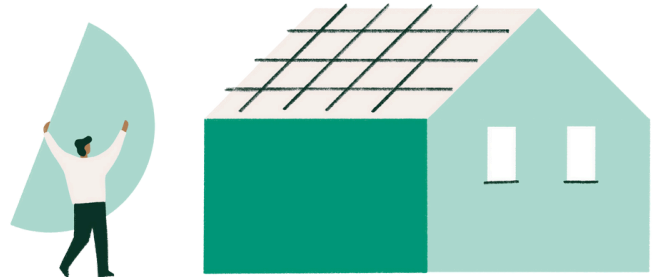
As well as increasing uptake during active delivery phases, the long-term relationships built by CLOs have helped overcome historical refusals, particularly for technologies like heat pumps, which initially faced scepticism. In 2023-4, 39 customers accepted having an ASHP installed when they had previously declined. The senior manager says this is partly because Broadacres are now offering solar PV alongside ASHP installs, but also because of the support and reassurance offered by their CLOs as well as hearing from neighbours or witnessing the benefits first-hand: **“We're seeing a lot more success stories with heat pumps...the neighbours' voice is a lot more powerful than our voice.”**

Word-of-mouth has become a powerful tool. With a consistent team, trust and reputation have grown over time. Interviewees noted that many residents had now received at least some form of improvement which has led to what one senior manager described as “almost saturation” in certain areas.

The wider outcomes of this approach extend beyond retrofit completion rates. Residents are more comfortable at home, with lower energy bills, and better quality of life. As the manager said:

“**The work we’re doing is saving customers a hundred pounds a month.**”

The impact is also emotional as well as financial. CLOs told us that some customers have described the retrofit as “life-changing”, which reflects not only of the technical improvements but also of the trust, consistency, and care shown throughout the process.



For Broadacres, the return on investment is seen in multiple ways: increased grant drawdown due to reduced refusals, smoother delivery with fewer delays or complaints, and higher long-term satisfaction that improves community perception. One senior leader noted that satisfaction “**probably trumps everything,**” not just because it confirms their values-driven approach, but because they have seen it directly impact participation.

In summary, Broadacres’ long-term investment in customer-centred retrofit has generated results that extend beyond the immediate scope of each project. Interviewees viewed this as a sustainable model — one that has delivered both measurable outcomes and broader organisational value.

This case study has been researched and written by Sabina Dewfield, [Shortwork](#) for Carbon Co-op. Many thanks to Broadacres for their participation in the research, Aneaka Kellay and Natalie Merrick at Carbon Co-op for editing and design. For more on this project, visit [the project page](#)



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