

# Broadacres: Redefining Retrofit Procurement Around People

*How an in-house customer liaison model helps deliver better outcomes, faster and fairer*

Carbon Co-op's "Understanding Experiences" research identifies organisational culture as key to people-centred retrofit. Broadacres' customer-centric culture is reflected in their procurement approach and 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 at Broadacres to find out more.



*Broadacres properties in North Yorkshire  
Credit: Carbon Co-op*

## Introducing Broadacres

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. Their strong customer-centred approach, made possible by their dedicated in-house CLO team and focus on collaborative partnership-style relationships with contractors, helps them to avoid common issues like refusals, access problems, and customer fear of upheaval.

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.

This case study covers how Broadacres' in-house CLO approach means they can prioritise procuring for technical excellence. We explore how they use regular contact with the delivery team to demonstrate, over the course of the contract, what 'good' looks like in delivering person-centred retrofit.



## Approach to procurement and social value

As part of the Social Housing Decarbonisation Fund (SHDF) Wave 2.1 from April 2023 to March 2025, Broadacres delivered retrofit works to over 400 properties. In 2024, they won Wave 3 funding of £1.8 million to retrofit an additional 640 homes. Rothwell Plumbing Services was procured to deliver this new wave.

Their newest round of retrofit works will include:

- **Solar PV installation for all properties.**
- **A smaller number receiving heat pumps, loft insulation, and smart air bricks.**
- **Retrofit coordination (PAS 2035 compliance) to qualify for government grants.**



*Broadacres staff speaking at site visit. Credit: Broadacres*

## Tendering terms

Broadacres took a highly detailed approach to its tender specifications, particularly for technical elements like heat pump installations. “We’re quite prescriptive about how we want it done,” noted the senior manager, acknowledging that this level of specificity had surprised some contractors. This rigour reflects Broadacres’ high expectations for quality and consistency, in line with how highly they value the customer’s experience, ensuring healthy, warm and cost-effective homes, and creating long-term benefits for their tenants. This focus on **procuring for technical excellence was reflected in the scoring, which was weighted 70/30 quality to cost**, as noted by a senior manager, “We really wanted a good focus on quality”.

While the manager acknowledged that contractors “would rather know that they were going to get a set value of work”, Broadacres cannot necessarily guarantee funding. So, they chose to enter into a contract which does not specify the total value of works, and which allows them to exit the contract if needed. This is important as it protects the social landlord in the event of not being able to access grant funding or in the event of receiving a high number of customers refusals.



For many social housing providers, a key challenge in procurement is balancing technical competence with customer service skills. Even though they hold full-time customer liaison roles in-house, taking full ownership of the customer relationship, Broadacres consider this such a key part of successful retrofit that they do include questions about this in the tender process and interview. However, because they deliver the customer liaison work themselves, procuring a good contractor is much less of a challenge:

“It’s almost more straight forward to tender for a contractor that is technically excellent...and not to confuse it with also trying to find a contractor that can do a really good customer engagement process, because they’re two really different skills sets.”

Ultimately though, they will award based on quality: “If they’re not delivering high-quality retrofits that are technically excellent, the customer experience goes down the pan anyway.”

## Managing Contractor Expectations: Broadacre's way of working is different!

Broadacres customer-centred approach is so noticeably different to traditional approaches that the senior manager reflected: "I do think they [the contractor] were surprised at how hands-on we are with it!"

She shared that the contractor described their usual way of working as being handed a list of properties and then left to manage the process independently: "They were asking us for this spreadsheet of properties," the manager remembered. Instead, Broadacres provide a much shorter list to start with, with customer contact details redacted, explaining: "We don't need you to contact customers because we do that."



This phased approach, working on about 50 properties at a time, while unfamiliar territory for the contractor, allowed the housing association to ensure more focused customer service and ease in managing expectations and communication. Moreover, it makes sure that customers with more challenging circumstances are not just 'passed over', but rather that they are met where they are before moving onto the next phase.

It also results in near to 100% access. "Our contractor was really surprised," the manager said. When the contractor proposed booking eight surveys per day (because they were anticipating three to four no-accesses), Broadacres countered that their approach would ensure that these wasted visits would be eliminated in the first place.

**“ We’ll get access to every single one...we’re not going to make a wasted journey, we’re not going to waste the customer’s time. ”**

The results speak for themselves:

**“ They’ve done the first 20 surveys – so they’ve done four days of surveys – and have had access at every single one, and every single one will result in a job. ”**

Part of the success is that Broadacres’ Customer Liaison Officers (CLOs) make all appointments, from the survey onwards, and even attend the survey personally with the contractor. Many customers feel reassured by the presence of CLOs, especially those with additional needs.

Overall, the high satisfaction rates and low refusals highlights the value of Broadacres’ customer-centred approach, 96% of customers rated their experience as being good or excellent. Where contractors typically see their work pipeline shrink as the project progresses/ “that number whittling down through the project”, Broadacres does the filtering upfront, and even then “the whittling out isn’t as much because our CLOs are there to support vulnerable customers.”

Broadacres advocates their approach to all contractors they come across,

**“ If you take on really good CLOs, they’re worth their weight in gold...you’re going to be saving money left, right and centre. ”**



She reflected that the traditional approach incentivises contractors to focus on easy wins, leaving harder-to-reach residents for later phases. Broadacres’ drip-feed approach, i.e., withholding the next property batch until the current one nears completion, prevents this ‘cherry-picking’.

The contractors now deeply appreciate the system’s efficiency, as the manager reflected: “They’re learning that it’s all for everyone’s benefits: customer, contractor and landlord.” This partnership demonstrates how housing associations can reshape contractor relationships to prioritise resident experience while actually improving delivery outcomes.

The previous contractor 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 the  
other contracts we’re on.  
”

Rather than slowing things down, this customer-focused model was credited with speeding things up: the most recent retrofit project was completed ahead of schedule, and with much less stress - something managers linked directly to the trust and rapport built with customers. Interviewees also suggested that this way of working may have a wider influence: when contractors see that taking the time to do things well leads to fewer problems and better outcomes, they may be more likely to carry that learning into future delivery.

## Creating a customer-centred culture

From the outset, Broadacres made their customer service expectations clear to their contractor. "We prepared a little presentation of our expectations around the customer side at the first meeting," the senior manager explained, "because we wanted to really make it clear that we're talking about customers as the first thing, right at the beginning."

The senior manager described instilling customer focus as "a drip feed thing." **By always prioritising customer discussions in meetings - particularly coming from senior staff members - they signal its importance.**



*Contractor at resident's home. Credit: Carbon Co-op*

Instead of relying on formal KPIs, Broadacres keeps quality/ standards high through their consistent focus on customer voice/ customer representation:

**“ We have a monthly face-to-face contractor meeting and our CLO manager is always there. She's the voice of the CLOs (who are the voice of the customers). So we have that customer voice coming all the way up. ”**

This is so important when decisions are being made on how and when to deliver works on the ground, for example when contractors propose rescheduling appointments.

As the manager illustrated: "Our CLO Manager will say: 'No, no, we can't do that because Mr. Jones is really vulnerable and the CLO's have arranged for him to have alternative accommodation". Under the typical approach, the change would have unintentionally made the works untenable, and the customer would have had to "drop out" of the retrofit process.



## In conclusion

Broadacres' customer-centred approach demonstrates how prioritising the customer throughout the process, from procurement to delivery, can substantially improve retrofit outcomes. Strong resident engagement does result in a more streamlined and efficient delivery, as well as better relationships and customer satisfaction.

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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