



Fusion21 Decarb in Focus –

**Effective Tenant Engagement –
The Key to Delivering Successful
Net Zero Projects.**



Agenda

- Introduction – Andrew Gray, Relationship Manager, Fusion21
- Derek Horrocks, Chair, National Home Decarbonisation Group
- Harry Crane, Lead Retrofit Consultant, Ridge
- Matthew Swingwood Asset Manager, Colchester Borough Homes
- Ben Payne Senior Retrofit Advisor, Colchester Borough Homes
- Q&A
- Fusion21 Decarbonisation Framework – Paul Towers, Framework Manager Fusion21.

Introduction



National Home Decarbonisation Group

Effective Tenant
Engagement – The Key
to Delivering Successful
Net Zero Projects.

Derek Horrocks
Chair of the NHDG

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 Chair of the National Home Decarbonisation Group (NHDG)

 Chair of Sustainable Building Services (UK) Ltd

 Chair of the National Insulation Association (NIA)

 Non-executive director of the Solid Wall Insulation Guarantee Agency (SWIGA)

 Unlock Net Zero Climate Champion of the Year 2024

 Founding Life Fellow of The Retrofit Academy



Derek Horrocks,
NHDG Chair



The NHDG

- Members are Tier 1 retrofit contractors leading the change to drive large-scale, high-quality home decarbonisation across the UK
- Providing expertise, resources and the manpower required to drive change at scale
- To share best practice aimed at scaling up delivery by greater process driven efficiencies and innovation
- Putting quality and customer service at the heart of everything we do
- Building a robust supply chain in which the Government can be confident to invest in to achieve net zero ambitions
- The Secretariat is provided by Gemserv.



The Importance of Effective Tenant Engagement

- Effective tenant engagement is one of the key requirements for delivering successful net zero schemes and is a PAS 2035 requirement
- A lack of communication and trust could make residents feel projects are done 'to them' rather than 'for them'
- Evidence points to residents having mixed opinions about retrofit projects - often seen as inconvenient and disruptive
- Some residents may not fully understand the benefits of retrofit improvements
- Resident refusal to retrofit work is a significant hurdle, with some studies reporting refusal rates as high as 45%*
- NHDG members are however reporting much lower rates of around 5-10% - with effective tenant engagement seen as playing a crucial role in this.

**Source: Action on Empty Homes*



Bespoke Strategies

- There is not a 'one size fits all' strategy. A collaborative approach to building strategies with all stakeholders from project inception is required - it will be key to the overall project success and its mobilisation
- Design retrofit around residents – each household has different needs e.g. health conditions, vulnerabilities and shift patterns
- Installing retrofit measures, in conjunction with other repairs to resident's homes, can not only minimise disruption but maximise economies of scale
- WH: SHF / LG provides an excellent opportunity to provide real positive impacts into a community
- Effective partnerships can maximise the local social and economic impacts in the wider community
- Consider the wider community along with residents, retrofit activity often affects neighbours and shared spaces.



Great Comms

- Residents should be at the centre of all planned works, regularly communicated with and their needs met, and expectations set
- Residents may not understand the financial savings, improved health, or environmental benefits of retrofit works if not made clear
- A collaborative communication plan is required – personalised, clear, concise and realistic messaging from project inception and implemented throughout the customer journey
- Common communication barriers can include language differences and digital exclusion which need considering
- Under PAS schemes, residents are impacted by additional surveys and more complex / time-consuming works - without proper communication with residents, access refusals from a lack of understanding can be more common.



Customer Voice

- Engage early with residents – both directly and via community sessions – explain the type work to be carried out, the benefits and what to expect
- Best results from NHDG members have been achieved with the contractor and client's dedicated TLO teams working together in collaboration
- Actively listen to residents' concerns - address and adapt plans where possible in a timely and open manner
- When done well effective engagement builds trust, making customers feel involved in the process rather than having change happen to them
- Best results have been when dedicated TLOs are locally recruited to manage the customer journey – they are trusted and understand the community's bespoke requirements.



End-User Information & Training

- Throughout the process behavioural advice is provided so residents can maximise the benefits of the installed works and to reduce their energy usage
- There can be a learning curve for residents in using new technology, so they may need additional advice and support
- On completion, residents are provided with in-person engagement and advice (including booklets) via our TLOs
- TLOs also follow-up with residents 28 days, and again after 6 months, post completion to make sure they still understand and are using the installed measures correctly.





NHDCG

National Home Decarbonisation Group

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Resident engagement in retrofit

June 2025 – Fusion 21

Lead Retrofit Consultant – Harry Crane

CONTENT

- Importance of tenant engagement
- Barriers to tenant engagement
- Project examples
- WH: SHF Wave 3



We aim higher
to take our
clients further

IMPORTANCE OF TENANT ENGAGEMENT

They occupy the property

Before we consider anything else, we must remember that this is not just a property that has fell on our list, this is someone's home.

Word spreads

Tenants are members of the community. Engaging them throughout the process will spread throughout the community.



It's a long process

Retrofit isn't quick or easy. It can be a long process, with many stakeholders. We don't just need to engage tenants at the onset; we need to keep them engaged.

They have final say so

Tenants can ultimately refuse works or make retrofit difficult to navigate. If they are not properly engaged throughout the process, can we blame them?

BARRIERS TO TENANT ENGAGEMENT

- **Net Zero negativity in mainstream media**

Retrofit is linked to 'Net Zero'. How much news do tenants receive which speaks negatively of the idea of net zero?

- **Outdated communication methods**

Do letters/calling cards work? How much can we move online?

- **Bespoke approach not established**

Do we engage elderly tenants differently? Language barriers?

- **Too many points of contact**

Social housing provider, retrofit assessor, consultancy, contractor, RLO...

- **Not enough resident involvement**

Are we leveraging resident feedback? They know their home better than anybody else.

Britain's Net Zero drive 'has made families poorer': Experts say decarbonisation bid is to blame for UK's productivity crisis - despite business chiefs' claim of £83bn boost to economy last year



PROJECT EXAMPLE 1



Ridge were appointed for retrofit consultancy services on a project in Colchester.

Some examples of tenant engagement efforts:

- Several IOE/MTP options for individual properties, presented to residents.
- Dedicated Retrofit Advisor appointed by client solely for resident liaison.
- Regular progress meetings discussing individual properties, incorporating specific communication methods to residents on a case-by-case basis.

PROJECT EXAMPLE 2

Ridge were appointed for retrofit and built environment consultancy services on a large scale retrofit project in London & Hertfordshire.

Some examples of tenant engagement efforts:

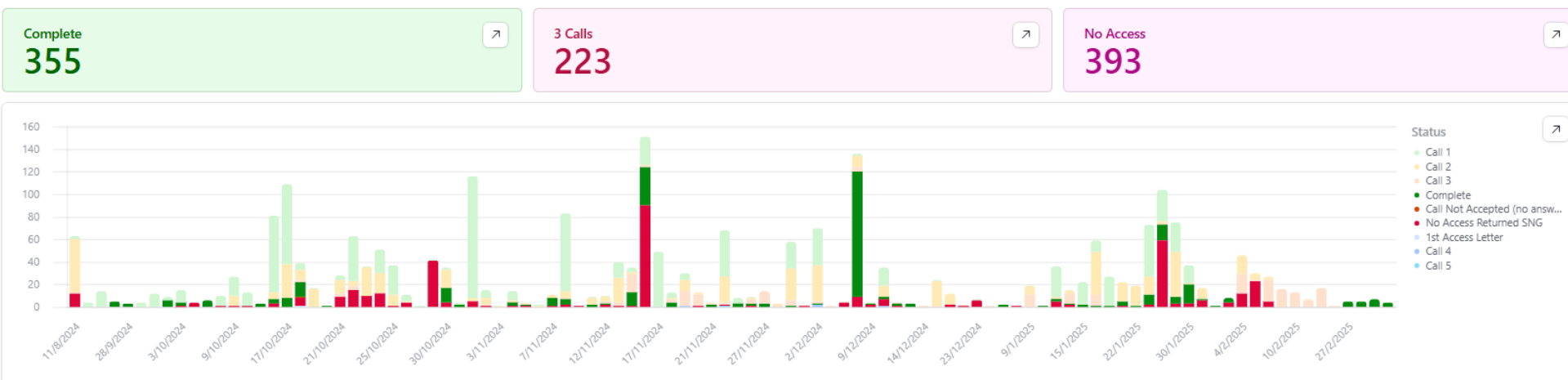
- Automated text messages which tenants could respond to and request bookings.
- Engagement days in the community with contractor and consultancy attending together.
- Attempting to tag on to existing visits (gas safety checks etc.).
- Utilising a bespoke platform to track all engagement efforts in real time.



WH: SHF WAVE 3

How can we engage residents in Wave 3...

- More resident engagement days/events in the community.
- Utilise online portals & platforms (allow residents to message in questions, see information on EEMs, request appointment times and more).
- Reference successful projects done under previous funding waves.
- Maintain communication, patience and understanding. Wave 3 will see more homes than ever retrofitted, it's important we don't let engagement slip.



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SHDF Wave 2.1 and Colchester City Council self-funded retrofit 2023-2025

Resident Engagement

Matthew Swingwood, Asset Manager
Ben Payne, Senior Retrofit Advisor

Overview

- Property-led project
- Strong link between those and longer-term tenancies/older residents
- Records of refusals of key elements
- Sickness/ill health of lead tenants and occupants
- Working with deeply entrenched views in some cases

Pre-Construction

- Tendered the work in Packages, securing 2 Principal Contractors
- Started with 2 Retrofit Advisors
- Engagement and promotion of key principles (Fabric First, dispelling myths about technologies etc.)
- Securing consent to proceed
- Agreed from the outset the frequency and method of contact during the longer pre-construction phase (2, 4 or 8 weeks; phone, text or email)

Delivery

- Package of 35: no Contractor RLO – CBH-led
- Package of 70: 1x Contractor RLO – responsibilities shared
- Pros and cons to both but the CBH-led project would be the preference

Process & Common Challenges

- Needs of residents
- Increased once Tech Surveys began, particularly at multiple Measure properties
- Considerable coordination to reduce visits/inconvenience to tenants
- Refusals of elements requiring re-modelling
- Accommodating delays due to work commitments, ill health, other tenancy matters
- Access never guaranteed – first instance could be on the day that work was due to start
- Keeping properties in for months to protect the overall project number – high churn of properties made it unviable after a while to simply move on to the next
- Complexities in developing a Programme from smaller packages of Measures, geographically spread across the Borough. Compounded by working on properties at different stages of the process. Continual battle between surveyor and/or sub-contractor and resident availability.

Conclusions

- Project ongoing: 32 more properties to complete within the self-funded period. Will be delivered by 1 Principal Contractor.
- Challenges remain: this is no less time-intensive for the team now that we are this far through
- Continually evolving our approach
- Promoting successes is important – but has limits

Q&A

FUSION21- DECARBONISATION FRAMEWORK

Paul Towers Framework Manager
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