



Resident Retrofit Journey





Contents

	OUR RETROFIT PROGRAMME	4
01	STAGE ONE AWARENESS	5
02	STAGE TWO ASSESSMENT AND DESIGN	8
03	STAGE THREE RESIDENT BUY IN	13
04	STAGE FOUR INSTALLATION	16
05	STAGE FIVE HANDOVER	18
06	STAGE SIX POST WORKS	20
	FLOWCHART OF PROCESS	22

Our Retrofit Programme

As one of the largest housing associations in the UK, we've a responsibility to be proactive on sustainability. That's why we've committed to ensuring our homes meet EPC band C or above by 2030 where affordable, cost effective and practical.

Our Energy Retrofit Programme models the number of homes we need to improve each year up to 2030. We adjust the model annually to take into account funding, resources and other delivery challenges. We ensure a joined-up approach with teams throughout Southern Housing, so work fits in with existing plans to replace and upgrade components in residents' homes.

Retrofitting is the process of modifying a home after it's been built. Retrofitting a home could involve changing the systems or structure. This work can improve amenities for our residents and improve the performance of the building, making it more energy efficient and reducing your energy usage.

This document outlines our typical resident journey; there may be variations depending on the programme. For examples instances like self-funded or ECO schemes, where certain steps might differ or be omitted.

There are six stages on the resident retrofit journey these are:



Stage 1

AWARENESS



Stage 2

ASSESSMENT AND DESIGN



Stage 3

RESIDENT BUY IN



Stage 4

INSTALLATION

Retrofit delivery team



Stage 5

HANDOVER

Retrofit delivery team



Stage 6

POST WORKS

Retrofit planning team

This document explains the six stages of the resident journey in more detail.

CREATING COMMUNITIES TOGETHER



01

STAGE ONE
AWARENESS

Stage One **Awareness**

Retrofit work can involve many measures and as a result can cause residents some disruption. Helping residents to understand the value of the work, the benefits to them and the measures we are likely to install will ensure that residents can more easily buy into the retrofit process.

Retrofit measures can include:



INSULATION

Loft, Floors, Walls, Roof



VENTALATION

Extractor Fans, Window Vents, Door Undercuts, Loft Vents



RENEWABLES

Solar PV, Air or Ground Source Heat Pump

To help raise resident awareness and buy in we'll:

- ✓ **PROMOTE RETROFIT WORK**
Promote retrofit work via case studies, articles on social media, our website, newsletters, events and as part of our wider Sustainability Teams communication plan
- ✓ **ROADSHOWS AND EVENT**
Run face to face and virtual roadshows with members of the retrofit delivery and planning teams and our retrofit assessors and installers
- ✓ **WEBSITE**
Ensure our new retrofit page on website is up to date with FAQs and case studies
- ✓ **RETROFIT ROAD MAP**
Publish Southern Housings Retrofit Roadmap, this will be opportunity to promote our plans and approach
- ✓ **COMMUNICATION**
Send a letter, email or text to residents in identified homes to let them know that they have been identified for a retrofit programme, what this means and introducing the company carrying out the retrofit assessment.

We must ensure all homes are at least EPC Band C or above by 2030 to meet government targets on affordable warmth where affordable, cost effective and practical. A retrofit assessment is a detailed and specific survey to each home. It measures the current energy efficiency of resident's homes and identifies what works we need to do to reduce the amount of energy residents use to heat their home and minimise damp and mould issues.

We take a place-based (local community) approach to retrofit. This is a strategy that considers the unique characteristics of a location and involves local communities and stakeholders to improve energy efficiency and reduce energy consumption.

Place-based approaches can include local involvement, engaging with local organisations and services to encourage residents to take part in retrofit opportunities. Collaborative problem-solving, working with local authorities, community energy organisations, and other local institutions allows us to create a successful retrofit strategy. This allows us to identify which homes might be most suitable to retrofit and how best to engage residents. We can look at residents' energy tariffs and potentially help them save money in the long run.

A place-based approach can help improve the health and economic situation of residents and reduce pressure on local health and social care.

We will engage residents by:

Asking our resident Sustainability Champions to review our retrofit process, provide feedback, attend events, carry out surveys, help with case studies, review website, promote retrofit work.



Involving Managers from across the business, to bring local knowledge and promote the retrofit process.



Sustainability Champions are individuals who've a passion for promoting the green agenda, especially wanting to contribute to the reduction on carbon emissions and support our ongoing improvements. We look to them to help us communicate with the residents in their local neighbourhoods. We are offering residents who have been through their retrofit journey the opportunity to become Sustainability Champions.

USEFUL LINKS CLICK HERE

[Environmental Sustainability Strategy](#)

[Strategic Plan](#)

[Retrofit Roadmap](#)

[Website](#)



02

STAGE TWO **ASSESSMENT AND DESIGN**

Stage Two **Assessment and Design**

The design stage involves our retrofit assessor carrying out a retrofit assessment of the resident's home. The retrofit assessment will take a whole house approach and can take up to two hours depending on the size and complexity of resident's homes. The assessment tells us what changes are needed to make it more energy efficient. We use this information to design improvements to improve the comfort of the home, reduce energy consumption and cost, address damp and mould issues and help ensure the residents have a healthy place to live.

During the visit the assessor will take photos and make a detailed scan internally and externally of the resident's home. They'll use a 360-degree camera to take images for the report. The software will automatically blur faces so personal photos will not be identifiable, but residents may wish to hide any personal items they don't want to be seen in the images. Residents don't need to worry about tidying the house or moving items, the assessor will just be focusing on the condition of the property.

The assessor will measure room sizes and things like radiators and window trickle vents. Lofts need to be left unlocked for the visit. Access will be needed to all the rooms, outside areas, electric and gas meter cupboard areas

To help support our residents through the retrofit design process we will:

- ✉ Send send a letter, email or text to residents advising the retrofit assessment is required and introducing the assessment company
- 👤 Ensure our Sustainability Engagement Lead is on hand to answer any questions that the residents may have regarding the process
- 📍 Keep our residents informed, when the assessors are coming, how long they will be in their home and use residents preferred communication channel
- 🔍 Expect the Retrofit Assessor to provide energy saving advice to our residents during appointment.

Some issues we can find when completing the retrofit assessment that would need addressing before we can start retrofit work include:

DAMP, CONDENSATION, MOULD

If the assessors find damp and/or mould in the home, they'll report this to the Southern Housing specialist Damp and Mould Team. We'll rectify this issue before we proceed with the retrofit work.

CONDITION OF THE HOME

Hoarding, we work with our Housing Management Team to ensure the home allows for clear access so we can complete the energy efficiency work.

HEALTH OF THE RESIDENTS

We work with our residents to ensure we understand any health issues that may impact the work we need to complete. Our retrofit installers will work with residents to find solutions that work for everyone.

STRUCTURAL ISSUES

We may have to address structural issues before we can complete the energy efficiency work. For example, we may need to carry out repairs to the walls, or the roof may be in poor condition and need work to it before solar panels can be installed.

FILLED WALL CAVITY

There may be debris in the cavity, or the previous fill may have failed we will arrange for this to be removed before the cavity is filled with new insulation.

The assessors gather pre works energy performance data and conduct tests on a sample of properties to determine actual energy performance improvements. For example:

- ✓ Installing energy monitoring devices
- ✓ Completing borescope surveys on cavity walls
- ✓ Completing under floor imaging for insulation

They gather information on occupancy, current comfort levels in the home and current energy use.



SAFEGUARDING CONCERNS

The assessors will raise any safeguarding concerns directly with Southern Housing Safeguarding Team.

HOME COMFORT

We will ask residents to complete a home comfort survey. This survey allows resident to tell us how comfortable they find their home in the summer and winter months. It asks about the temperature and air quality and how much control the residents have over these areas. The idea of the survey is to document the living conditions of the home before and after the retrofit work from the resident's point of view.

RESEARCH

They'll ask residents if they'd be happy to take part in research and share energy bills. If they say yes, our Retrofit Planning Team will contact the resident for more details.

FOLLOW UP

Once the retrofit assessment has been completed, we'll send a follow up letter to confirm if the retrofit works are not going ahead and the property being is removed from programme along with explanation.

SATISFACTION

Once the retrofit assessment has been completed, we'll send out a satisfaction survey to the residents regarding the assessment process. The survey asks general questions around the ease of booking the survey, how courteous the surveyor was and how was the communication. It also asks more specific questions about the survey process. Did the residents receive energy advice, did the surveyor explain what they were there to do and answer any questions. We also give the resident to raise any issues or questions with the Sustainability Team.

If we require planning permission to complete any of the work, we will apply for this and keep the residents updated throughout the process.





If retrofit work is going ahead:

- ☰ Our Retrofit Delivery Team will send follow up letter to confirm that works are going ahead, and next steps.
- 🏠 We will pass the residents details to our Retrofit Installer. They will contact the residents to arrange more detailed pre-install survey.

✎ **DESIGN SURVEY**

There is no access required for this stage unless queries are raised, and a follow up visit required.

Residents call in to ask where they are in the programme so good to understand this stage.



03

STAGE THREE
RESIDENT BUY IN

Stage Three **Resident Buy In**

Our Retrofit Project Coordinator (Retrofit Delivery Team) sends an email / letter to introduce the retrofit installer, in particular the Resident Liaison Officer (RLO) role within the installer organisation. A pre works survey will be completed. The survey ensures that the design plan is suitable for the resident's home before work starts.

Our Retrofit Project Coordinator, dedicated Project Managers and the retrofit installers RLO are on hand to answer any questions that the resident may have throughout the process.

We'll serve party wall notices (if required) via retrofit coordinators/ designers - this is our responsibility as landlord but useful for residents to know we complete this stage. Party wall notices are required whenever work is undertaken to a boundary wall shared between two houses.

Next steps:



ARRANGE HOME VISITS

Contractor contacts residents to arrange pre installation home visit and pre work technical survey. Any resident queries are answered by the RLO and access issues etc escalated to the Retrofit Delivery Team. They will provide a pre work handbook.



APPOINTMENT FOR WORK

Southern Housing Delivery Team and retrofit installers will arrange an appointment for (work-based surveys). The Delivery Team will engage with residents and introduce contractors for the first time.



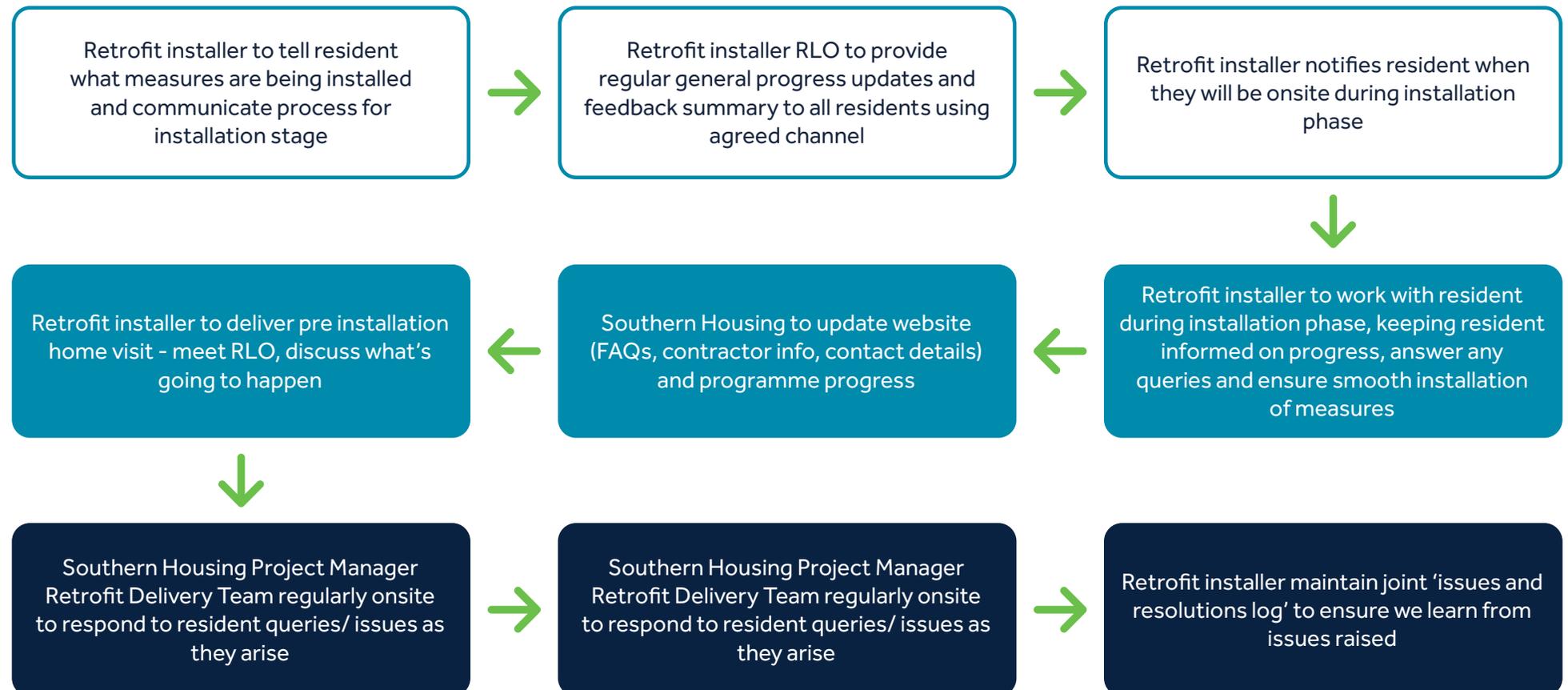


04

STAGE FOUR
INSTALLATION

Stage Four **Installation**

Our Retrofit Delivery Team contacts resident to keep them updated on progress, when they're coming, how long they'll be in their home and will use preferred communication channel. Our Retrofit Project Managers will manage the whole process from start to finish ensuring quality workmanship and monitoring contractor performance.





05

STAGE FIVE
HANDOVER

Stage Five **Handover**

- 📞 Retrofit installer RLO arranges appointment for handover home visit and post works EPC.
- 👤 Southern Housing Retrofit Project Manager and consultants where appropriate attend property for post inspections - This happens at the same time as the handover home visit. Contractor RLO arrange appointment.
- ✍️ Retrofit installer sends out personalised written instructions (and handover pack) with links to videos and who to contact with queries.

Retrofit installer completes home visit to:

- ✓ Demonstrate how the new systems work and how to look after the retrofit works and the importance of ventilation
- ✓ Provide energy efficiency advice
- ✓ Provide routes to more info

Our Project Manager, Retrofit Delivery Team may complete a post inspection of the completed work. This is an opportunity to gather resident feedback.

Our Retrofit Delivery Team arranges for customer satisfaction survey to be given to residents.





06

STAGE SIX
POST WORKS

Stage Six **Post Works**

FEEDBACK

Our Retrofit Planning Team summarise learning from feedback to residents involved in the project. This could be on our website, the LIVE magazine and on social media. This will include case studies as part of learning from feedback.

We may contact residents to arrange home visit or invite to roadshow (if required) or cocreation event to reflect on project.

SURVEY

The Retrofit Planning Team will send out a post works Home Comfort Survey 6-12 months after work completed as part of an email campaign. This asks what impact have the works had? We'll use this information to improve our service and to use feedback for case studies and lessons learned activities.

MONITORING

If we've installed an energy monitoring device to collate and review post works energy data, we will contact residents where energy usage is higher than expected. We are only assessing energy usage and performance post work not how residents are using the energy.

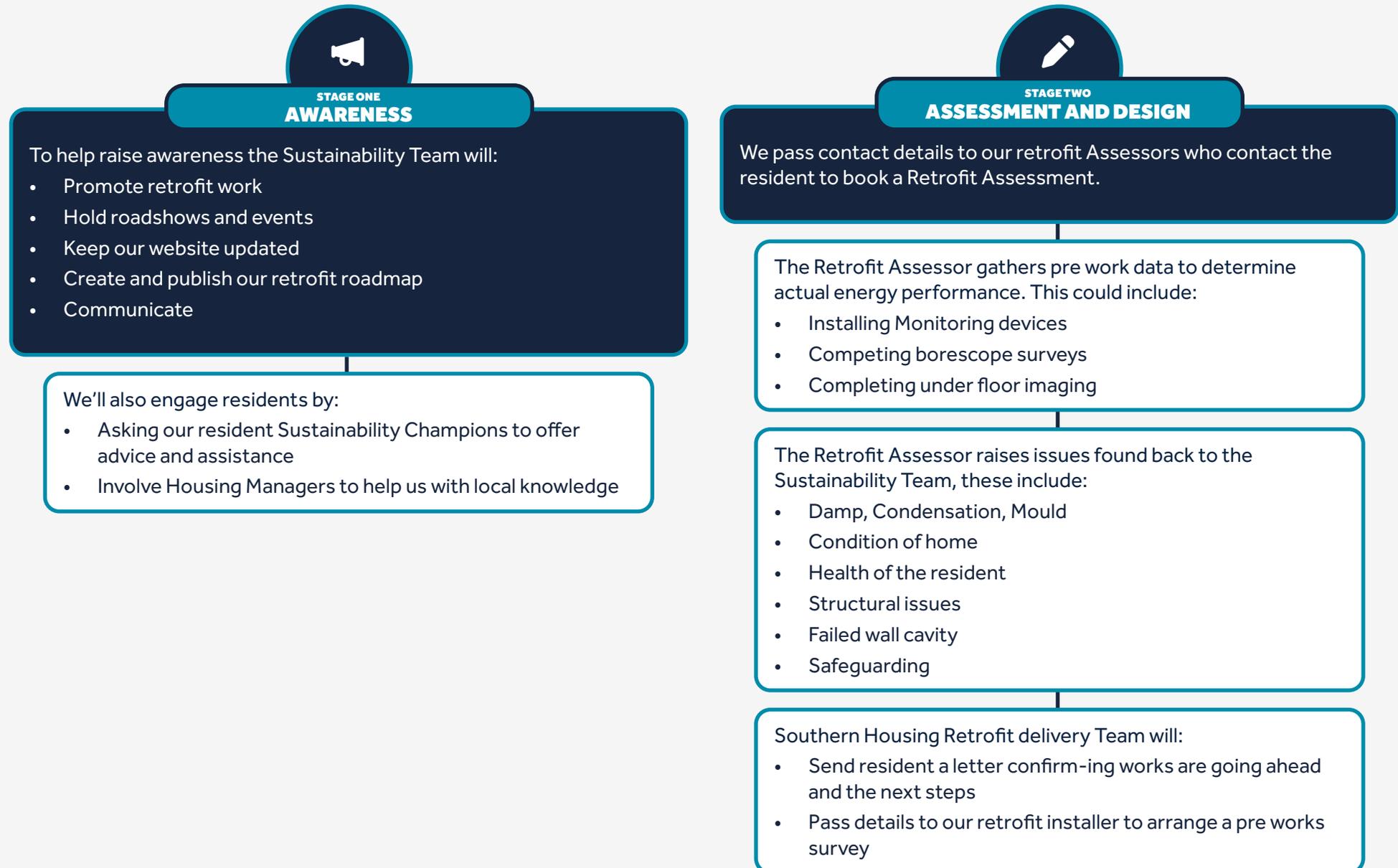
EVALUATION

Based on the data we will decide if we need the Delivery Team to arrange an evaluation workshop or roadshow or visit a few months after handover and during first heating season to:

- ✓ Check systems being used correctly
- ✓ Deal with any issues
- ✓ Ensure resident knows how to save energy
- ✓ Gather general feedback, including positive case studies. See our website for more information.



Process for Resident Retrofit Journey





STAGE THREE
RESIDENT BUY IN

The work now sits with Retrofit Delivery Team. They will:

- Apply for party wall notices if required
- Pass the energy measure designs to the retrofit installers
- Arrange with resident for measure specific surveys to be completed

The Retrofit Delivery Team and Retrofit installers will:

- Tell residents what to expect and respond to concerns
- Share resident experiences
- Identify local advocated and champions
- Agree how best to communicate with each resident
- Get buy in from resident to gather energy data through monitoring devices
- Introduce the key people



STAGE FOUR
INSTALLATION
RETROFIT DELIVERY TEAM

Retrofit installer will:

- Advise residents of measures being installed
- Provide timings for work and regular updates
- Deliver work
- Complete a technical Home visit

Southern Housing will:

- Keep website updated with FAQ, Retrofit information and key contacts
- Ensure our Project manager is on site regular while work in progress

