



OptimisedRetrofit

Engaging with residents: lessons learnt

29 June 2022

ORP Yr 1 Feedback and Evaluation Event

sero | grasshopper

Overview

- The challenge
- Overview of approach
- Behavioural science insights
- Key messaging
- Creating a toolkit
- Lessons and recommendations

OptimisedRetrofit

Welcome

As we enter Spring and brighten up your day by positive progress we have made on the Retrofit project.

Optimised Retrofit has now hit a major milestone, as the first version of the Whole Home Survey has now been launched ready for use by RSL teams to start assessing pilot homes - which will help us test and refine the app as the project progresses.

Also in This Issue

- Whole Home Survey
- Sharing Best Practice
- Metered Energy Savings
- Make the Future Y...

OptimisedRetrofit

Croeso

Wrth i ni ddod i mewn i'r Gwanwyn ac i'r haul ddechrau tywynnu, dymunwn oleuo'ch diwrnod chi ymhellach drwy rannu llawer o newyddion da am y cynnydd positif rydyn ni wedi'i wneud ar gyflenwi'r prosiect Ôl-osod er mwyn Optimeiddio.

Mae'r prosiect wedi cyrraedd carreg filltir bwysig erbyn hyn, wrth i fersiwn gyntaf yr Arolwg Cartref Cyfan gael ei lansio'n barod i dimau Landlordiaid Cymdeithasol Cofrestredig ei ddefnyddio i ddechrau asesu cartrefi peilot - a fydd yn ein helpu i brofi a mireinio'r ap wrth i'r prosiect symud yn ei flaen.

Buon ni allan ar lefel leol hefyd yn siarad â phreswylwyr am sut y bydd Ôl-osod er mwyn Optimeiddio yn effeithio arny'n nhw a'r manteision y bydd yn dod â nhw, yn ogystal â rhannu pigion o'r prosiect ar lefel genedlaethol yn yr Uwchgynhadledd Her Ôl-osod. Darllenwch ymlaen i gael gwybod mwy....

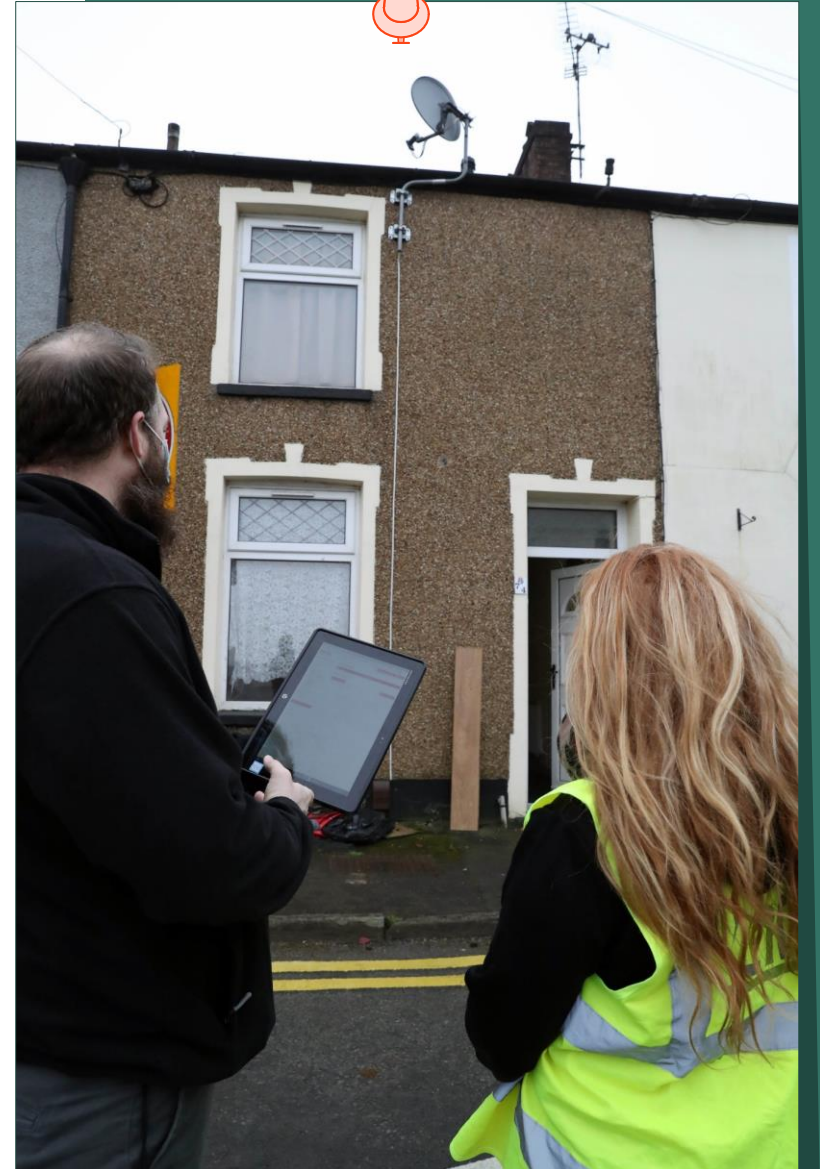


Hefyd Yn y Rhifyn Hwn

The challenge

One of the key challenges and risk to delivery was communications

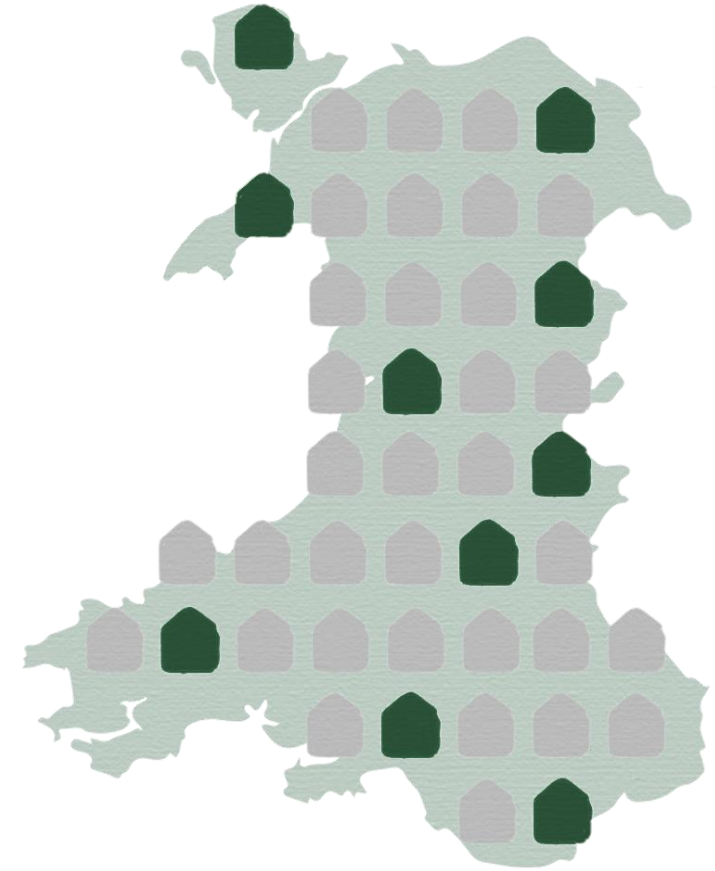
- **Resident buy-in and consent:** critical in terms of being able to deliver the works as well as to use the data.
- **Getting the message out:** lack of understanding from RSL staff around process.
- **Information and guidance:** Existing toolkit and messaging was not delivering what was needed
- **Public knowledge:** Lack of wider information about retrofit at a Wales and UK level



Engagement Action Plan

Objectives

1. Understand more about resident perceptions and understanding of OR and decarb technology (IES, Smart Meters and Whole Home Survey)
2. Develop and hone messaging to resonate more effectively around the positives and address challenges and concerns.
3. To create a communications toolkit to assist RSL teams in effectively engaging with residents.

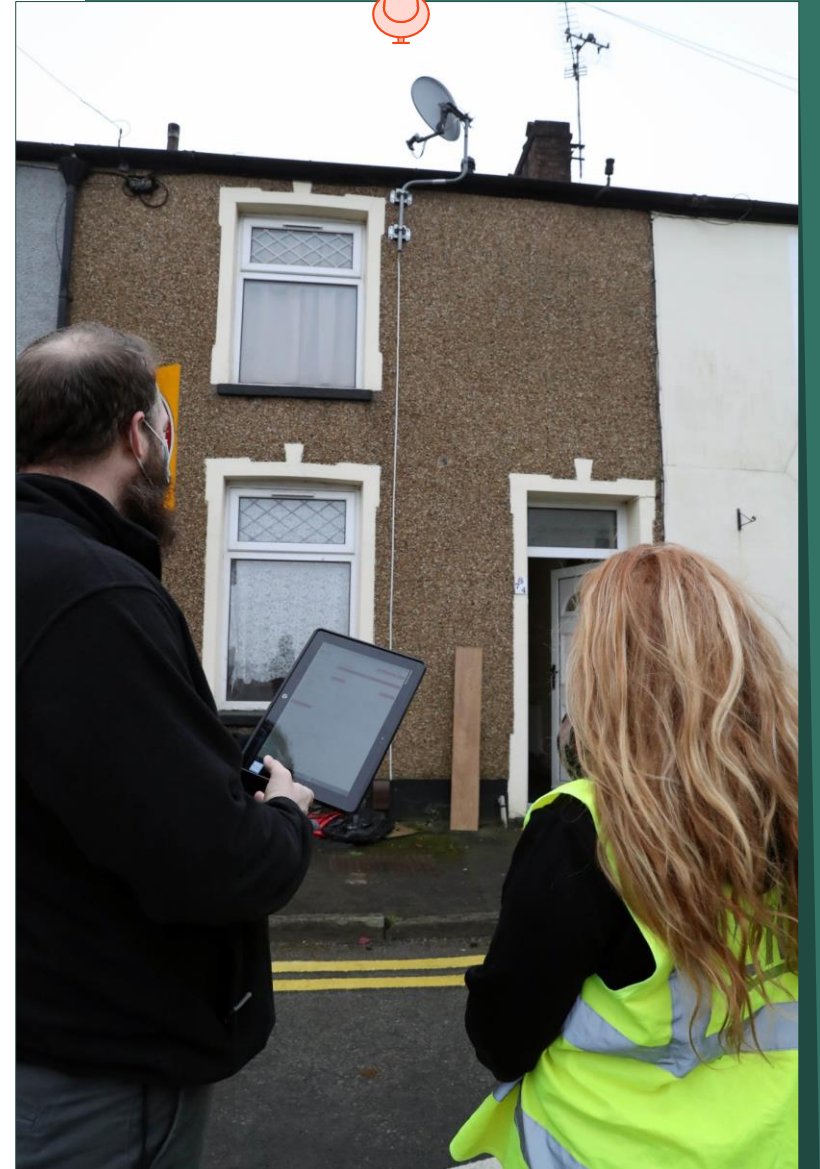


Resident Feedback

What were we hearing on the doorstep?

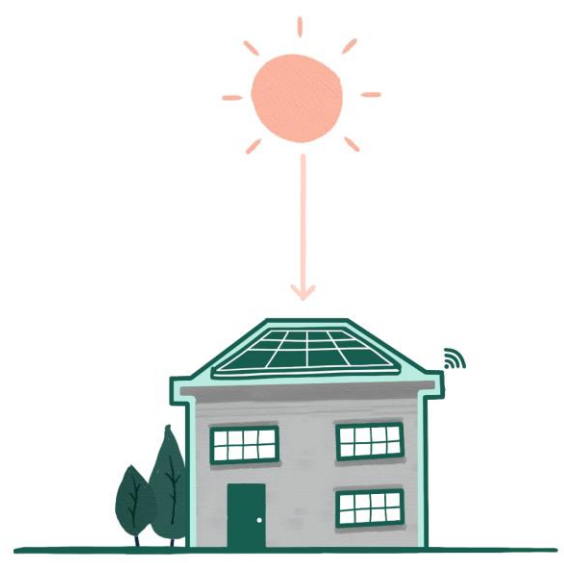
Resident Feedback Focus Group (Summer 2021)

- **Some positive response** from residents in relation to OR and potential for upgrades to their home.
- **Lack of understanding from residents around 'net zero' and retrofit tech**
- Some existence of **conspiracy theory concerns** around being 'watched' by smart meter
- **The amount of disruption** that retrofitting is going to cause can take residents by surprise, even after initially opting in
- It is more **difficult to sell retrofit when the work is less significant**, meaning less significant opportunity for potential cost savings but similar amount of disruption
- Need more **detail on the specifics** of each step of the journey
- **Videos and case studies** viewed as being a key tool in the future





Optimised Retrofit





Social Media Analysis

- 61% of messages related to 'smart meters' Positive.
- Most liked/shared 'Positive' messages usually champion smart meters for their environmental benefits.
- Positive messages from residents with smart meters usually mention energy efficiency.

Negative Messaging

Analysis shows several negative themes arising from sceptical members of the public:

- 1) A suspicion that the energy provider benefits most financially from the installation of a smart meter, rather than the resident.
- 2) Negative personal anecdotes from residents who have or had a smart meter in their home – usually referring to installation process or smart meter breaking down.
- 3) Paranoid messages using vague language, often linking to conspiracies around microchips, chemtrails or vaccinations.



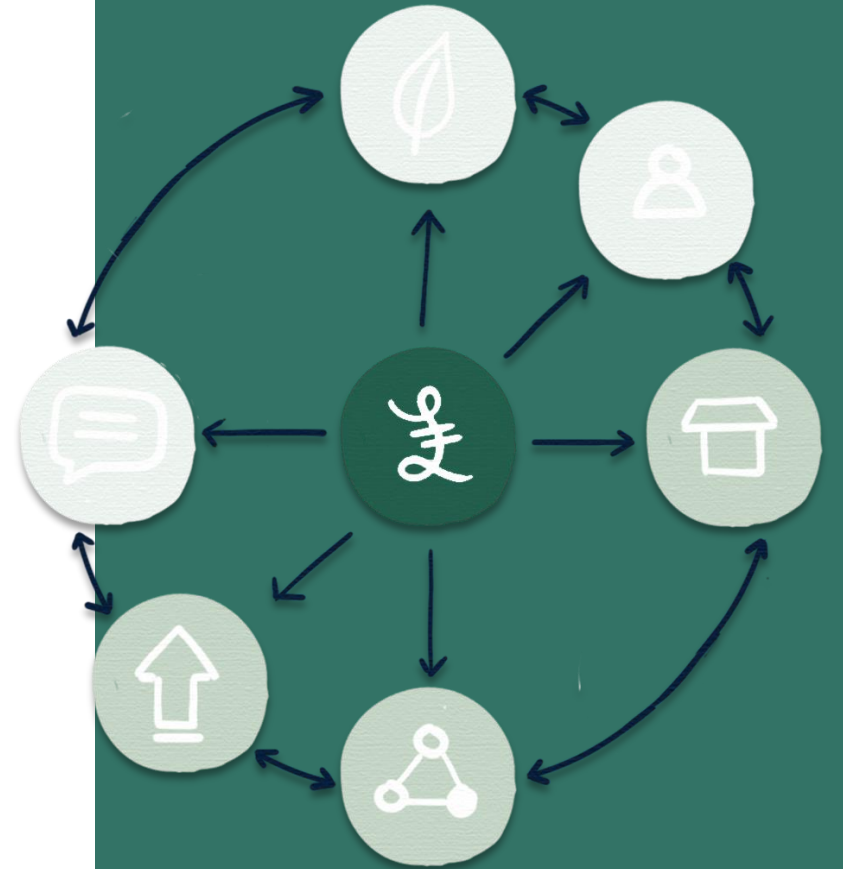
Behavioural Science Insights

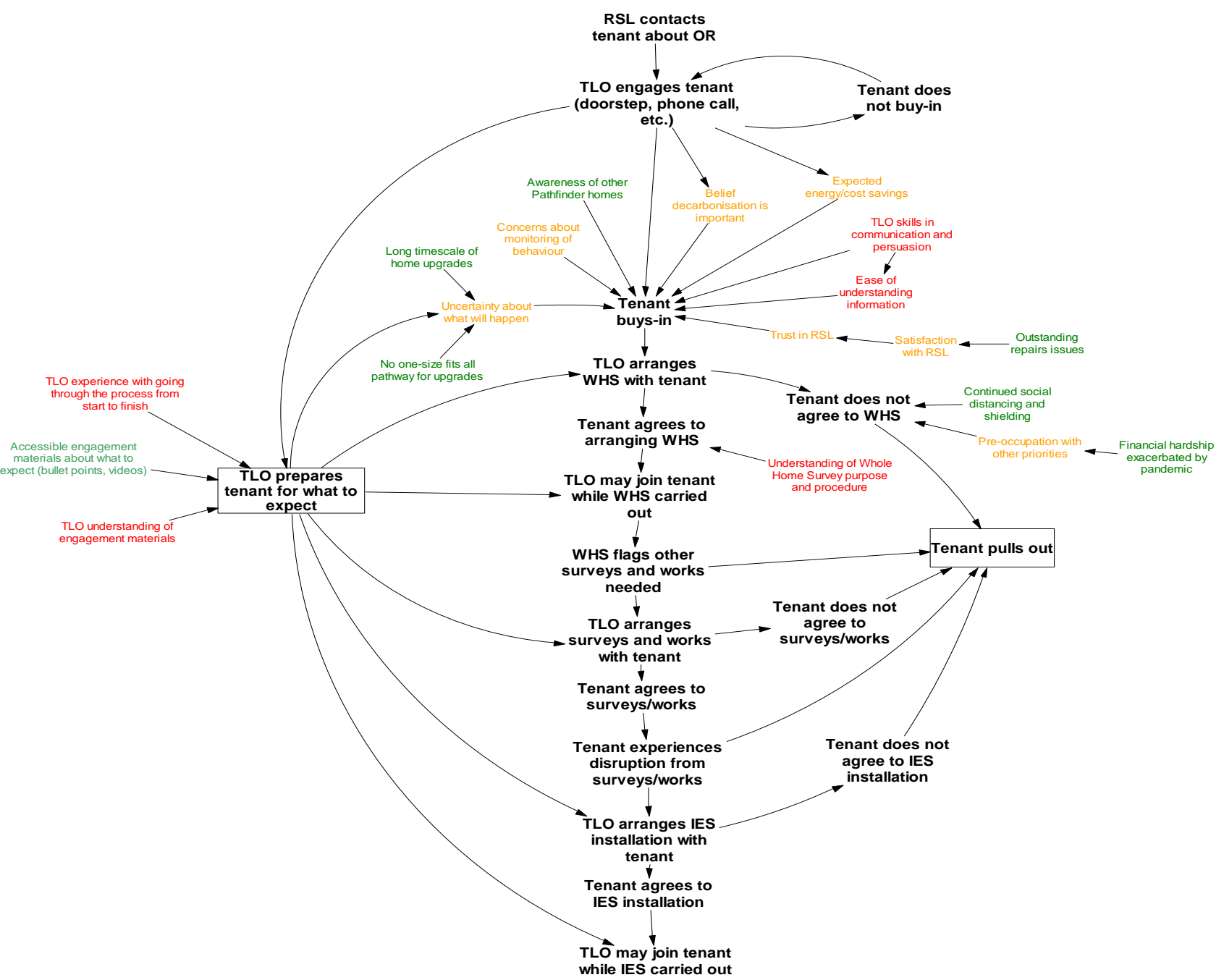
UCL behavioural science team commissioned to provide insights.

This includes an analysis of the resident's journey, and key influencers and drivers that may impact this process and outcome.

Key observations include:

- Much of the resident's journey is driven by the tenant liaison officer / community engagement officer. We therefore need to equip them to be able to explain the information clearly and persuade the resident to get onboard.
- The resident has an existing relationship with the RSL and TLO which will influence how far they get on the journey towards agreement. What insights can the RSL use or collect to inform how they approach the resident?
- If the resident has a poor existing relationship with the RSL, a third party messenger could potentially be helpful.
- Different engagement strategies may be needed for different residents. What background information is available (e.g. demographics)?

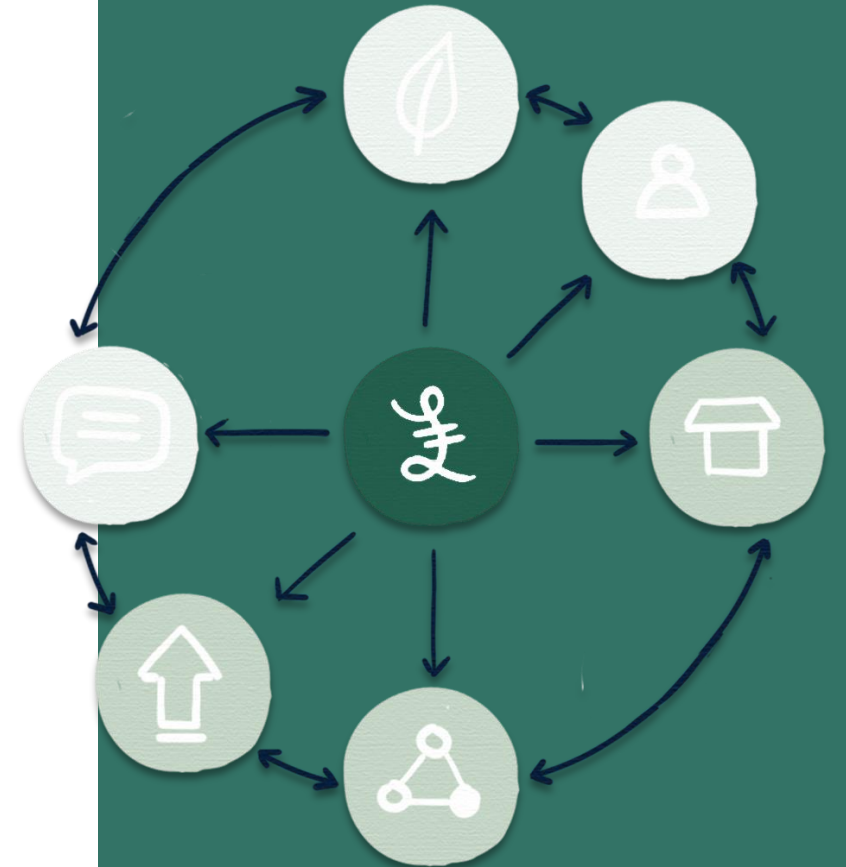




Behavioural Science Insights

Behaviour change interventions identified (based on Behavioural Change Wheel)

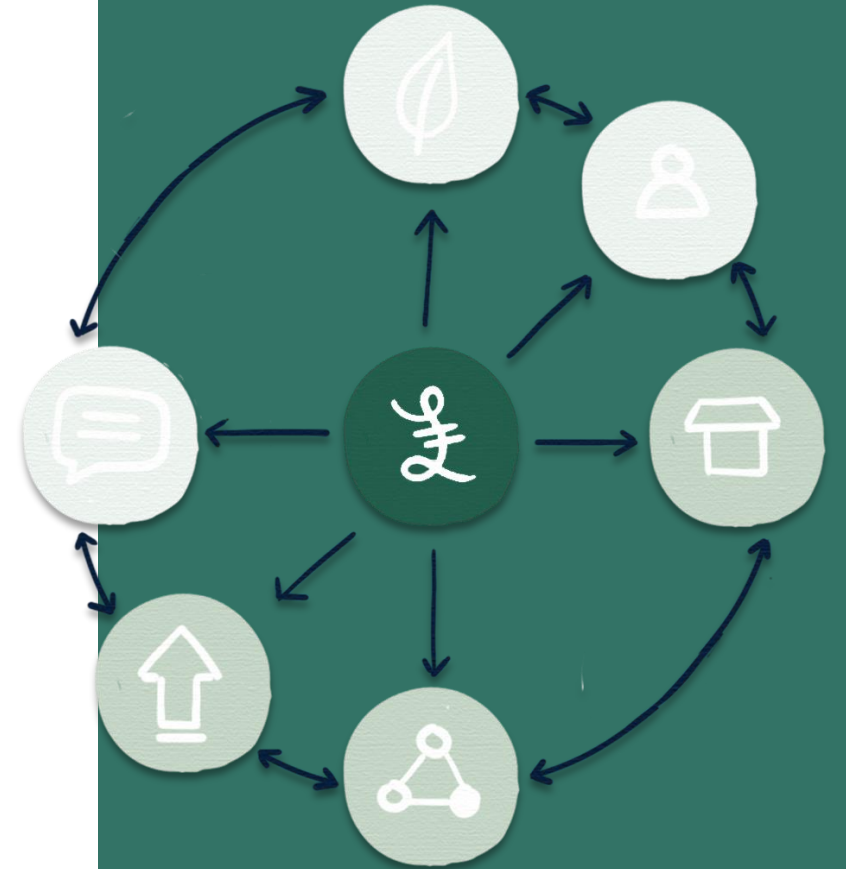
- **Education:** Rather than knowledge and understanding about the technical aspects, it is more important for TLOs and tenants to know and understand what would happen throughout the whole process.
- **Incentivisation:** It was relatively easy to get buy-in to free retrofit upgrades that would save the resident money in the long term.
- **Modelling:** TLOs agreed that videos and other accessible materials showing the process of what to expect would be helpful. Videos could both educate about the process and model the desired behaviour.



Behavioural Science Insights

Behaviour principles to consider based on the MINDSPACE model.

- **Messenger:** Having a 'real conversation' is important; Welsh Government comms traditionally not pitched at the right level.
- **Incentives:** It was relatively easy to get buy-in to free retrofit upgrades that would save the resident money in the long term.
- **Defaults:** There is a challenge for 'going with the flow' because TLOs are not completely aware of what to expect, i.e. what the default process is.
- **Affect:** Tenants who have completed the process experienced major unexpected disruptions, so much that TLOs had to apologise. TLOs emphasised that managing expectations is really important.



Key messaging: workshop

Resident Engagement Focus Group Workshop

Board 1

OptimisedRetrofit

Objectives

To test the draft messaging that has been developed for Optimised Retrofit and understand how the messages are perceived on an emotional level and why they are resonating (or not).

This session is an opportunity to obtain qualitative research that asks poignant, open-ended questions to explore residents likely motivations, preferences, and lifestyle. The breakout group questions will be focused around the following key areas:

- 1. Clarity, conciseness, and focus:** Will residents have an instant understanding of what OR is and what we want them to do next?
- 2. Resident benefits:** Does the messaging answer the "what's in it for me?" question?
- 3. Hook:** Does the messaging "hook" the resident in and make them want to keep reading?
- 4. Truthfulness:** Is the messaging accurate and truthful? Does it avoid unsubstantiated claims?
- 5. Language:** Are we using language that residents will understand? Avoiding jargon or acronyms?
- 6. Social proof:** Are we offering social proof in the form of evidence and testimonials?
- 7. Needs:** Does the message uncover hidden needs? Are we highlighting a problem and offering a solution?

Overall Programme

10:00 - 10:10 Introductions
Presentation on background of project
Questions
Split into breakout rooms

10:10 - 11:00 Breakout Rooms x4 (Seen oversewing breakout rooms)

1. Clare & Molly
2. Damian & Georgina
3. Andrew & Bethan
4. Carys & Hannah



Key Messages - Primary

Working together to tackle the climate emergency
Making our homes easier to heat is an important part of helping tackle the climate emergency; homes are responsible for around 20% of carbon emissions in the UK.

Saving you money
Making your home easier to heat is a win win scenario – as it means that your energy bills will be lower and that your home will have a lower carbon footprint. It will be friendlier to the environment.

Making your home as low carbon as possible
By understanding your home in detail, we can come up with a plan to help make your home as energy efficient and easy to heat as possible - whether that is straight away, or in stages over the next few years.

Improving your wellbeing
Improving resident wellbeing by making sure your home is easy to heat and manage, and is also well ventilated.

Project Name

**Optimised Retrofit:
Green Home Improvements Scheme**

**Optimised Retrofit:
Saving energy, reducing bills, tackling the climate emergency**

**Optimised Retrofit:
Making your home greener for the future**

**Optimised Retrofit:
Making your home cheaper to heat and helping to tackle the climate emergency**

Key Messages - Secondary

Energy efficient homes are the new normal
Over the next 10-20 years all of our homes are going to have to be upgraded to be as easy to heat as possible (that's a total of 14million homes in Wales alone) - so this is just the start of a process that more and more people are getting on board with sooner or later.

Tackling fuel poverty
Making homes easier to heat can help tackle fuel poverty for those residents struggling most to pay their bills.

Protect our future generations
Avoid the many harmful consequences for your children and grandchildren of not acting.

It is free
The work will be paid for by your landlord and Welsh Government.

Infographics

Resident Journey

Infographic 1

Infographic 2




Case Study Videos

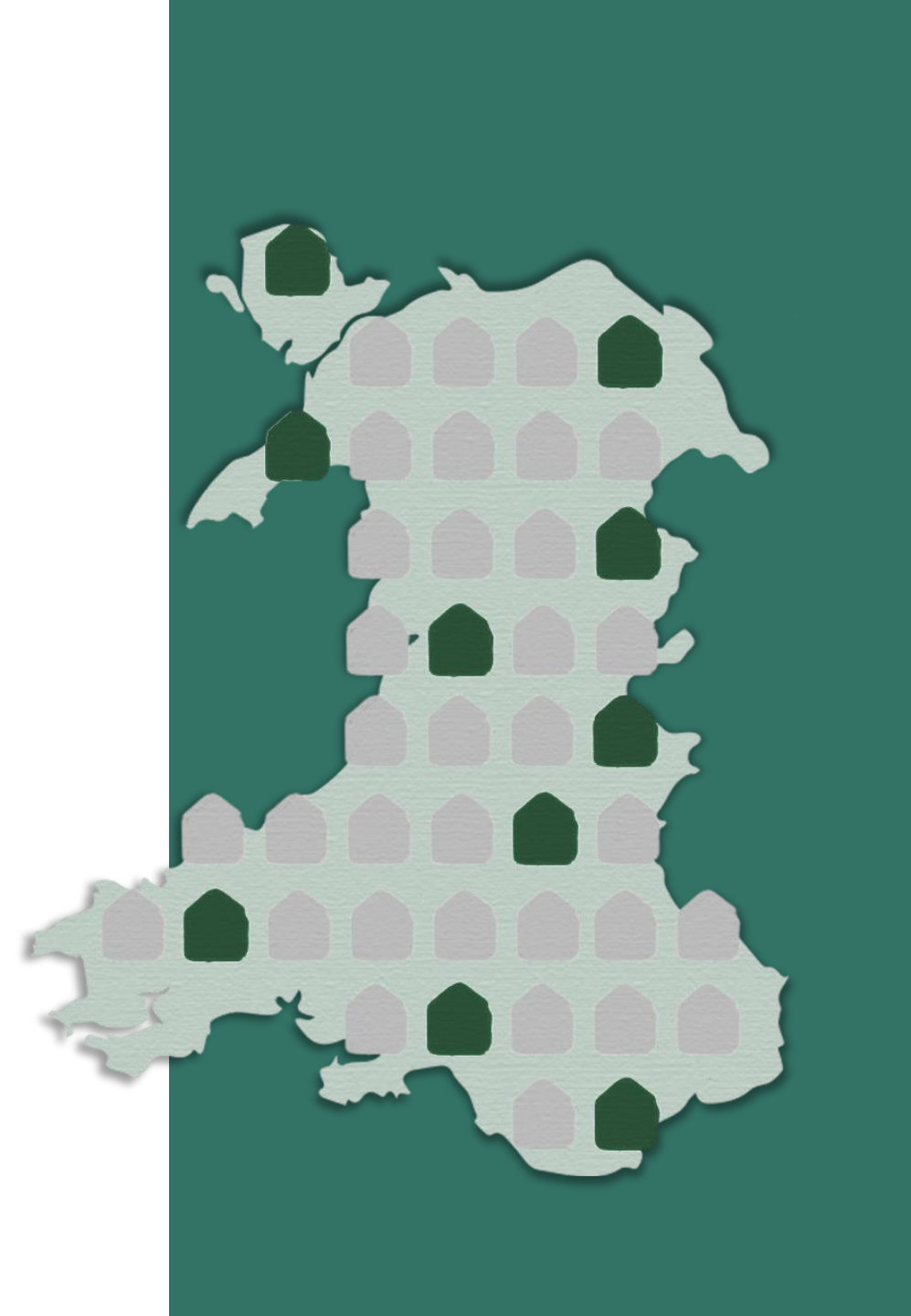
Key messaging: focus groups

We had feedback from residents from RSL's such as Newport City Homes and RHA. This included comments such as:

“The overwhelming view was that tenants in general don't understand what carbon emission are, what in their homes are emitters, they suggested the language should be changed to ‘green’ or eco”

“Tenants don't buy into freeing you from fossil fuels as they never felt trapped by them.”

“It feel quite general. We are from Wales, many of us have lived here all our lives, so we want to feel what we are doing and contributing to will benefit Wales, our children and grandchildren and how so?”



November 2021

- **Working together to tackle the climate emergency:** Making our homes more energy efficient is an important part of helping tackle the climate emergency: homes are responsible for around 20% of carbon emissions in the UK.
- **Saving you money:** Making your home more energy efficient is a win win scenario – as it means that your energy bills will be lower and that your home will have a lower carbon footprint so will be friendlier to the environment.
- **Tackling fuel poverty:** making homes more energy efficient can help tackle fuel poverty for those residents struggling most to pay their bills.
- **Making your home as energy efficient as possible:** By understanding your home in detail, we can come up with a plan to help make your home as energy efficient as possible - whether that is straight away, or in stages over the next few years.
- **Energy efficient homes are the new normal:** over the next 10-20 years all of our homes are going to have to be upgraded to be as energy efficient as possible (that's a total of 1.4million homes in Wales alone!) - so this is just the start of a process that everyone is going to be getting on board with sooner or later.
- **Protect our future generations:** Avoid the many harmful consequences for your children and grandchildren of not acting
- **It is free:** The work will be paid for by your landlord and Welsh Government.

January 2022

- Making our homes greener is an important part of our overall efforts to reduce the impact of climate change across Wales.
- Climate change is a global issue with local consequences, including poorer air quality, increased temperatures, and local flooding.
- The work on your home will include new smart technology, that will make it easier to understand how your energy is used and help you manage it more effectively. This means you could save money now or in the long run.
- In order to come up with a plan to make your home as green as possible, we need to understand more about the way your home is built, as well as the way you use it day-to-day.
- As well as being good for the environment, retrofit is shown to also be good for you and your wellbeing - by making it easier for you to manage your home and keep warm and cosy.
- Welsh Government and your landlord will pay for the installation and work to make your home greener.

Environmental Messages

November 2021

- **Working together to tackle the climate emergency:** Making our homes more energy efficient is an important part of helping tackle the climate emergency: homes are responsible for around 20% of carbon emissions in the UK.
- **Protect our future generations:** Avoid the many harmful consequences for your children and grandchildren of not acting

January 2022

- Making our homes greener is an important part of our overall efforts to reduce the impact of climate change across Wales.
- Climate change is a global issue with local consequences, including poorer air quality, increased temperatures, and local flooding.

Changes

- The phrase 'energy efficient' has been removed from all messaging. Our testing showed that the phrase doesn't connect with residents, nor is it self-explanatory. 'Greener' is being used instead. Residents broadly understand what this means/implies i.e. more sustainable/environmentally friendly.
- The stat '20% of carbon emissions' had no cut through with residents. They did not know what 'carbon emissions' were, therefore the idea of homes producing 20% of them had little meaning.
- Talking about the climate emergency at such a high level had little cut through with residents. Whilst there is greater awareness of the climate emergency (or climate change as many know it as), many struggled to understand why it should concern them.
- As a result, we decided to weave local concerns into the environmental message, so residents will understand why it should concern them specifically.
- The Future Generations as a term had less cut-through than hoped. It was therefore decided that specifying the 'harmful consequences' should be prioritised.

Financial Messages

November 2021

- **Saving you money:** Making your home more energy efficient is a win win scenario – as it means that your energy bills will be lower and that your home will have a lower carbon footprint so will be friendlier to the environment
- **Tackling fuel poverty:** making homes more energy efficient can help tackle fuel poverty for those residents struggling most to pay their bills.
- **It is free:** The work will be paid for by your landlord and Welsh Government.

January 2022

- The work on your home will include new smart technology, that will make it easier to understand how your energy is used and help you manage it more effectively. This means you could save money now or in the long run.
- Welsh Government and your landlord will pay for the installation and work to make your home greener.

Changes

- In our meetings with RSL representatives and TLOs it became clear that they had serious concerns about the ‘saving you money’ message, in that having works done to the home does not strictly guarantee that you will save money.
- Whether the resident saves money will depend on other factors, such as fuel prices, inflation, and the residents’ personal choices as to when they use energy in the house. The original message does not qualify this.
- Instead, we have qualified the financial message by saying the resident ‘could save money in the long run.’ We also linked this to the smart meter and IES to ensure its benefits are understood.
- The ‘Tackling fuel poverty’ message was scrapped because many felt there was a stigma attached to the wording.
- We believe it is worth ensuring that residents know that this is a Welsh Government project, and that the installation will come at no personal financial cost to them.
- However, the statement ‘it is free’ was removed, as it was felt that this may mislead residents into thinking they no longer had to pay their energy bills. We therefore clarified that the installation and works are ‘free’.

Retrofit Process Messages

November 2021

- **Making your home as energy efficient as possible:** By understanding your home in detail, we can come up with a plan to help make your home as energy efficient as possible - whether that is straight away, or in stages over the next few years.

January 2022

- In order to come up with a plan to make your home as green as possible, we need to understand more about the way your home is built, as well as the way you use it day-to-day.



Changes

- This message has not changed much, with the exception that references to 'energy efficiency' have been removed.

Future Housing Trends Message

November 2021

- **Energy efficient homes are the new normal:** over the next 10-20 years all of our homes are going to have to be upgraded to be as energy efficient as possible (that's a total of 1.4million homes in Wales alone!) - so this is just the start of a process that everyone is going to be getting on board with sooner or later.

Changes

- This message was inserted to present retrofit as a 'norm' (or at least a future 'norm'). However, this was removed because it had little cut-through with residents, was too vague, and relied on the terminology 'energy efficient'.

Wellbeing Message



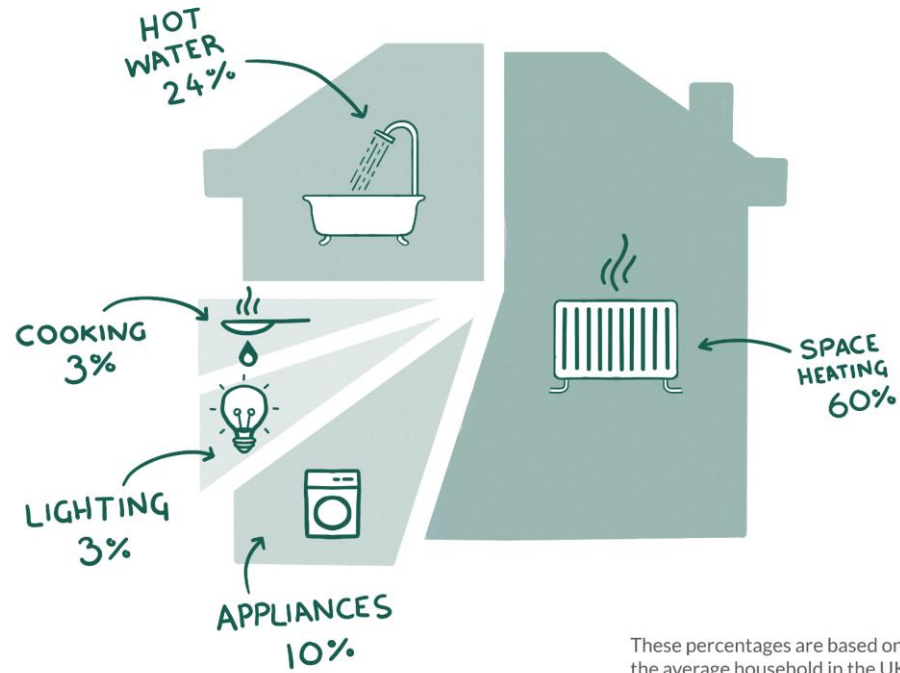
January 2022

- As well as being good for the environment, retrofit is shown to also be good for you and your wellbeing - by making it easier for you to manage your home and keep warm and cosy.

Changes

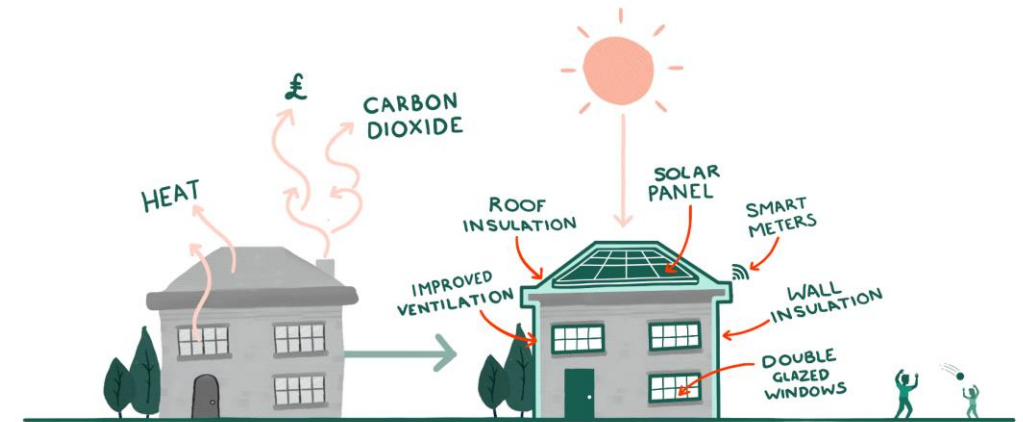
- Whilst originally conceived as a secondary message, a message based on resident wellbeing proved popular in our RSL focus groups. We have also been made aware of research done in this area that shows we can evidence this claim.

Developing a toolkit: graphics

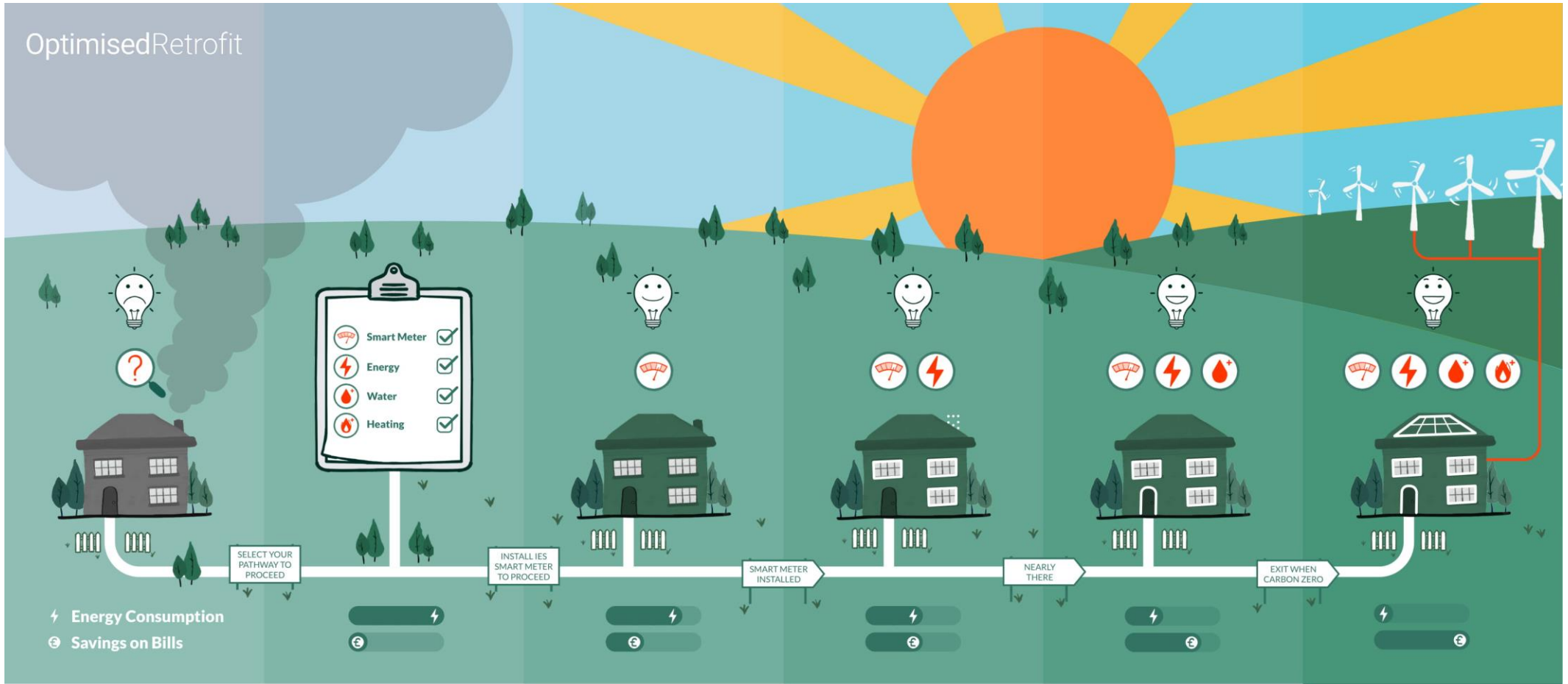


These percentages are based on the average household in the UK.

Improvements which make your home more energy efficient



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Whole Home Survey

Homes are assessed for energy performance and use, looking at existing systems and controls as well as what it is like inside your home. This process determines your bespoke retrofit plan to make the home more energy efficient.

Pathway to Zero

Your home is now on the 'pathway to zero', which refers to the list of home improvements needed for it to become so energy efficient it no longer creates any carbon emissions. It now has a green light, and it will be given a unique plan tailored to the building and your home life.

Intelligent Home Controls

As part of the plan, your home is fitted with the appropriate modern energy control systems, one of which is a smart meter, to monitor energy consumption to increase efficiency.

Energy Saving Measures

Depending on your lifestyle and the nature of the home, it will be retrofitted with different materials, systems, components and controls to help you use less energy.

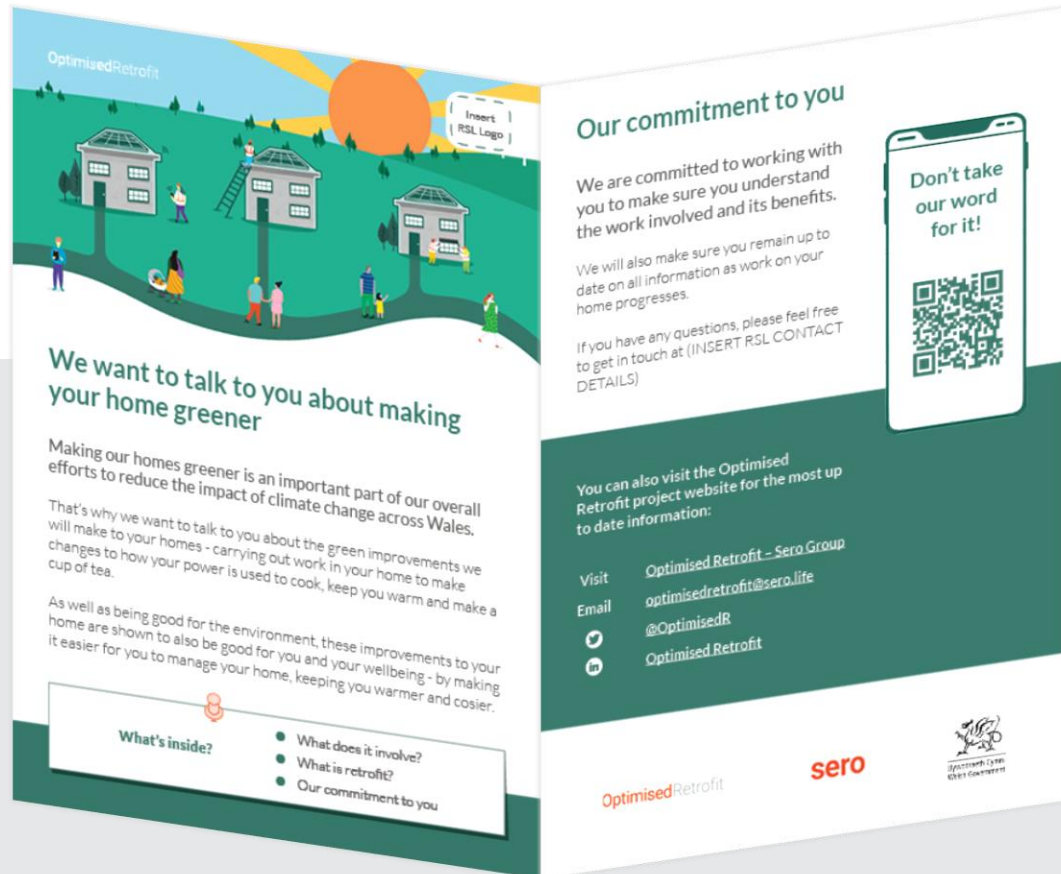
More Energy Saving Measures

Energy use is tracked so we understand how to help you save more. So, where it's right to go ahead, further improvements will be added to optimise energy consumption and efficiency.

Net Zero Home!

Once all changes are made and the home is retrofitted and optimised, your pathway to zero is complete! You will have a 'Net Zero' home (or as close to a Net Zero homes as possible depending on the type of home you live in). This means you have reduced your carbon footprint and will help save money on your bills.

Developing a toolkit: Information leaflet



OptimisedRetrofit

We want to talk to you about making your home greener

Making our homes greener is an important part of our overall efforts to reduce the impact of climate change across Wales.

That's why we want to talk to you about the green improvements we will make to your homes - carrying out work in your home to make changes to how your power is used to cook, keep you warm and make a cup of tea.

As well as being good for the environment, these improvements to your home are shown to also be good for you and your wellbeing - by making it easier for you to manage your home, keeping you warmer and cosier.

What's inside?

- What does it involve?
- What is retrofit?
- Our commitment to you

Our commitment to you

We are committed to working with you to make sure you understand the work involved and its benefits.


We will also make sure you remain up to date on all information as work on your home progresses.

If you have any questions, please feel free to get in touch at (INSERT RSL CONTACT DETAILS)


You can also visit the Optimised Retrofit project website for the most up to date information:

Visit [Optimised Retrofit - Sero Group](#)
Email optimisedretrofit@sero.life
[@OptimisedB](#)
[Optimised Retrofit](#)

Don't take our word for it!



OptimisedRetrofit **sero**



What does it involve?

In order to come up with a plan to make your home as green as possible, we need to understand more about the way your home is built, as well as the way you use it day-to-day.

Your home will be individually surveyed to give us the information we need to make all the arrangements for your green upgrade. The work on your home will include new smart technology, that will make it easier to understand how your energy is used and help you manage it more effectively.

This means you could save money now or in the long run. We will call to arrange a time in advance that is convenient to you and don't worry, we will be following the latest Covid-19 guidance from the Welsh Government to keep you and our colleagues safe.

What is retrofit?

Retrofitting involves installing new smart technology to make homes greener.

This could be as small as using energy-efficient light bulbs or as big as installing solar panels. A greener home will have less impact on the environment and be cheaper to run. So it's win-win.

Good news...making your home green won't cost you a thing!

As your landlord, it is our responsibility to make sure your home is the best possible standard it can be, now and for the future.

That is why we are working with Welsh Government who will pay for the installation and work that's required to make your home greener.





Cathryn Hughes
Treaty Liaison Officer

Developing a toolkit: Engagement plan

Optimised Retrofit

Resident Engagement Plan Template

Planning and Preparation

Understanding your audience:

1. Do you have a contact database for all OR tenants (including telephone and email)?
2. a) Have these residents been regularly engaged over recent months/years?
Yes/No/Maybe

b) If so – how, when and why?
3. Do you know if these residents have a preference in how they are contacted?
Yes/No/Maybe
4. Do you have an understanding of what your residents' motivations, drivers or needs are likely to be in relation to OR, to help shape your early messaging?
5. What are key messages for the project:

Message 1	<input type="text"/>
Message 2	<input type="text"/>
Message 3	<input type="text"/>
Message 4	<input type="text"/>
Message 5	<input type="text"/>
6. Have you tested your communications and messaging on current tenants (for example any existing tenant panels):

7. a) Are there any additional stakeholders or community advocates that should be engaged in relation to this project?
Yes/No/Maybe

b) If yes please provide details:
8. Please identify the key internal project members for the scheme:

Project Manager	<input type="text"/>
TLO or community point of contact	<input type="text"/>
Any others	<input type="text"/>
9. Have relevant team members been briefed to be able to talk to residents about the project?
Yes/No/Maybe
10. Do you have a Q&A prepared for handling resident enquiries?
Yes/No/In progress/Not required

Stage 1: Introducing the project (March)

We would suggest a simple introduction to the project for residents, that sets out how the project will help save money and bills and help the environment, as well as explains the timeline and next steps.

Q: What are your top three key messages for introducing the scheme to residents:

Message 1	<input type="text"/>
Message 2	<input type="text"/>
Message 3	<input type="text"/>

Q: Which tools will you be using to introduce the project to residents and how:

Telephone calls:	<input type="text"/>
Letter or newsletter:	<input type="text"/>
Virtual online event:	<input type="text"/>
Online information:	<input type="text"/>
Social media:	<input type="text"/>
Other:	<input type="text"/>

Q: What is the target date for launching the project to residents?

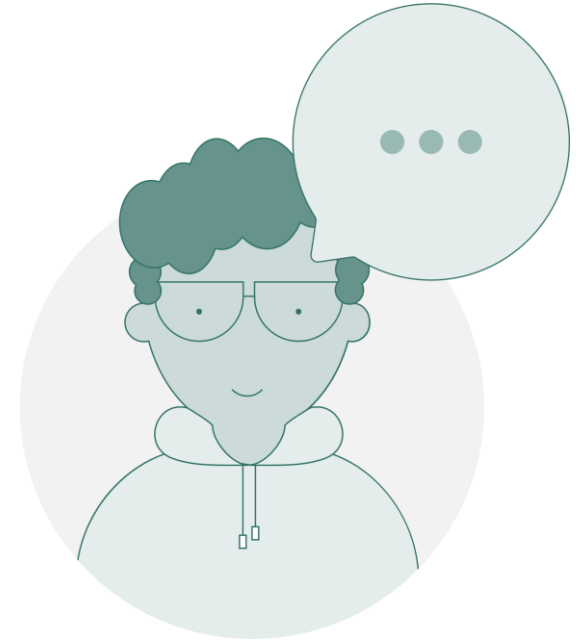
Q: Will your materials need to be translated into Welsh?
Yes/No

Q: List any images, infographics or other media you may need to help support your awareness campaign:

Lessons and recommendations

Based on experience and lessons learnt - key recommendations:

- 1. Train the messenger:** critical to maximise one-to-one engagement and encourage conversation. Need to inspire confidence throughout.
- 2. Strategic approach:** mapping out proactive plan for engagement, alongside plan for managing reactive activity.
- 3. Managing affect:** manage expectations and be prepared for emotion and reaction to major disruption.
- 4. Plug and play toolkit:** further development of an easy to use toolkit for engagement, to be tailored for a range of audiences
- 5. Incentivisation:** could be explored further as an identified key tool for behaviour change
- 6. Further messaging and sentiment analysis:** Lack of wider information about retrofit at a Wales and UK level
- 7. Making retrofit relevant:** broadening toolkit to enable teams to put retrofit in the bigger picture in terms of the climate emergency and wellbeing etc
- 8. Wider awareness raising:** Lack of wider information about retrofit at a Wales and UK level



Any questions?

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Keep in touch:

Clare Jones

clare@grasshopper-comms.co.uk

[@ClareJonesGPR](https://twitter.com/ClareJonesGPR)