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Managing and building homes

Retrofit Pilot

The customer experience



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Retrofit Pilot Scheme

As part of our commitment to the decarbonisation of existing stock, Thirteen conducted a pilot project to retrofit 57 properties in Hartlepool using a fabric-first approach. A range of properties were part of the project including:

- 1 bed flat (mid-terrace)
- 1 bed flat (ground floor gable)
- 2 bed flat (mid-terrace)
- 2 bed flat (first floor gable)
- 2 bed house
- 2 bed house (gable)
- 3 bed house
- 3 bed house (gable)

The retrofit work consisted of:

- Cavity extraction and refill
- External wall insulation
- Internal wall insulation beneath kitchen units and at the front elevation on bungalows
- Loft top-up insulation
- Double-glazed windows and composite doors (houses only)
- Extractor fans in the kitchen and bathroom, and positive input ventilation (PIV) in hallway/landing

This report includes early lessons learnt from the project, particularly around the customer experience on their home decarbonisation journey. This will help us develop a customer engagement toolkit which will allow us to refine our engagement process in future decarbonisation retrofit programmes.

Customer Engagement

We set out to speak with customers at every stage of this project, based around the following key areas:

- How we can ensure customers understand how retrofit work will impact them?
- How we can learn throughout the retrofit process and consistently refine customer engagement and communication?

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We asked customers the following specific set of questions:

- How much did you understand about the process from the beginning and is what happened what you expected?
- What are the best ways to communicate with customers about these kinds of projects?
- How satisfied were you with the result of the work?
- How satisfied were you with the support you received from Thirteen during the work?
- Do you feel more engaged with Thirteen after being part of this pilot project?
- How was your life impacted while the work was being conducted?

We also used the pilot to answer the following questions:

- What impact has the work had on carbon emissions in the properties and customers' energy consumption and energy bills?
- How can this pilot be used to inform decision making for the future?

In May 2021, Thirteen visited the homes of the customers in Hartlepool where the retrofit work was taking place. This was the first contact with them around the proposed retrofit work on their homes.

After the initial visit, the Retrofit Customer Engagement Coordinator (RCEC) was the key point of contact for our customers. Originally the coordinator's role was to raise awareness and educate customers on carbon net zero. However, this role quickly developed to become a more direct point of contact for all aspects of the project delivery between the customer and the contractor. The coordinator also arranged any of the required visits for activity such as asbestos surveys and energy performance certificates.

The learning so far:

Customers were asked to complete a home energy questionnaire to determine their understanding of the green agenda and the importance of retrofit. We found:

- Out of the 28 customers who responded to the questionnaire, 27 understood why retrofitting their homes is important
- Of those same 28 customers, nine understood how using energy impacts the environment, 12 stated they had no knowledge but had increased awareness once the RCEC had explained, five did not understand and one customer did not answer the question.

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What customers told us:

- **Customer engagement started too early** Some felt that they had too many visits, with periods in between where nothing happened
- Too many people contacting the customer caused confusion Customers were being visited by various individual contractors carrying out essential survey work before the work started. This led to confusion about who was visiting them and why and they often turned contractors away because they believed the work had already been done, in turn causing delays. It was agreed during the delivery phase that the RCEC would take on the role of coordinating these visits and making sure the customer knew what was happening and why
- **Too much technical information can be overwhelming** Sharing too much technical information left some customers feeling confused and this led to some of them giving incorrect information to other customers on the retrofit pilot, thereby increasing confusion
- Increase in energy prices is causing stress and anxiety customers were concerned about fuel poverty (this was prior to the recent energy crisis)
 - Out of 28 customers who responded to the questionnaire, nine said they were concerned or anxious about the cost of heating and powering their homes
 - Of these 28 customers, eight said they had concerns around choosing between heating their home or eating, with a further four indicating that while it's not a concern now, it's something they worry about if prices increase further.

Lessons Learnt

- **Relationships with the customer** The RCEC's relationship with the customers was key in moving the retrofit project forward and building trust with the customer. An individual approach was taken for each customer, which recognised when they needed extra support. This could be, for example, clearing a loft space at the start of the work, or tenancy-related issues
- Getting key data is difficult Relying on customers to provide key information around their energy usage proved very difficult and time-intensive. Most customers don't keep their bills or have access to online accounts. Appreciating this at the outset saves time and wasted effort
- Who's engaging It was significantly harder to engage customers living in flats, as opposed to customers living in houses and bungalows. This was because getting into the buildings was difficult and letters/messages were not always getting through to the customer. Understanding that this engagement needs additional effort and time will lead to more realistic timetables for customers
- Engaging in the right way It's clear that customers want to engage in different ways. Some prefer minimal contact, some want weekly updates, some want visits to

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their home, others want a quick call. The initial visit should include determining the level of contact each customer would like

- **Delivering information** All data and information such as questionnaires and retrofit surveys was collected, delivered and received via home visits, telephone calls and in hard copy paper format. The initial customer engagement was face to face, which gave them the opportunity to raise any concerns from the outset
- Be realistic on the programme and add in plenty of 'float' to mitigate delay -Ensure enough time is given to accommodate customer needs and concerns
- **Build in more time for the infrastructure phase** Much of this relies on external parties' input and control.

Implementing the learning

Thirteen is delivering further retrofit work in the Primrose Hill area of Stockton. Using the lessons learnt in Hartlepool, the initial engagement with customers has been more structured. For example:

- Early in the process a letter introducing customers to the RCEC as a point of contact was delivered. The letter didn't commit to dates or the work that would be carried out. Instead, it talked generally about energy efficiency work being carried out to customers' homes. Customers were only informed of work starting on their properties once a date was confirmed with the contractor and the scope of work was agreed. This meant expectations were better managed
- The RCEC now acts as the key point of contact for all surveys and contractor visits to the customers' homes and arranges, in one visit where possible, the three required building surveys and assessments. This has reduced the appointment time from six hours to four by avoiding duplication and pooling information for contractors
- By using the RCEC role differently from the outset, significant improvements in engagement with customers were achieved. For example, in one week Thirteen was able to complete 17 retrofit assessments with customers in Primrose Hill; in Hartlepool this averaged at five per week.

Delivering the Work

Various factors have impacted on the ability of the contractor to deliver the work to the original timeframes. These have included:

- Difficulties with the supply chain for materials
- Skills gap and retention
- The complexity of the work programme

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In addition to the retrofit programme, we decided to align the property investment programme with the retrofit work, in the hope of minimising disruption to customers and optimising the schedule of work. This strategy makes sense from both a customer and a business perspective in the longer term.

Use of 'Real Time' Sensors

Linked to the retrofit project, Thirteen also committed to trialling the use of real-time sensors in the retrofit properties to help understand the impact of the retrofit work on the environment within the customers' home.

Key elements we wanted to understand by using the sensors were the heat and humidity levels within each home, to ensure the decarbonisation and investment measures put in place were the best for the customer. Over time we'll be able to use the data to allow for more timely and targeted interventions related to fuel poverty and the cost-of-living crisis.

We experienced issues in the deployment of the sensors, mainly due to software glitches, and at the time of the report, the sensors had not been deployed. A separate report will be produced in the future.

Skills Gap

Thirteen began reviewing the skills gap from an internal perspective in 2021. This initially focussed on the installation and maintenance of Air Source Heat Pumps (ASHPs) and how the demands of a large retrofit programme can be met. It became clear this was much wider than the ability to install and maintain ASHPs, and that many more skills around retrofit are needed, such as those in green energy technologies, a general understanding of climate change and the impact of the net zero agenda on our customers, colleagues and homes.

The skills required are both in-house and in the supply chain and roles include retrofit installers, retrofit designers, retrofit surveyors, retrofit coordinators, retrofit advisors, product manufacturers and retrofit evaluators. There was a significant gap in qualifications and awareness of the PAS2035 process.

Our pilot has also evidenced the need for specialist customer engagement/education roles to engage customers in the project before it starts and to help customers understand how to maximise the benefits of their newly retrofitted home.