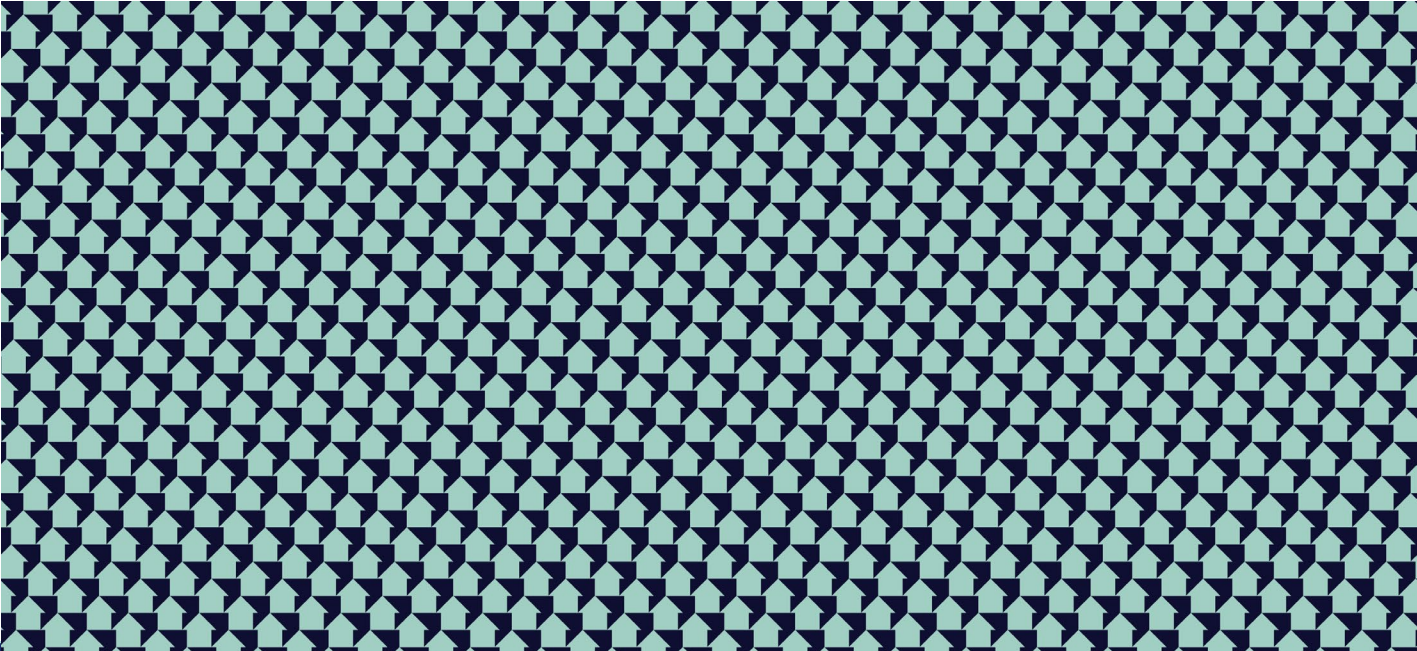




# **BOOSTING THE IMPACT OF LOW-CARBON TECHNOLOGY THROUGH ADVICE: A GUIDE FOR SOCIAL LANDLORDS**

June 2026

**CHANGEWORKS.**

# Table of contents

|      |                                    |   |
|------|------------------------------------|---|
| 1.   | Introduction                       | 3 |
| 1.1. | Who is this guide for?             | 3 |
| 1.2. | Why does energy advice matter?     | 3 |
| 1.3. | What does the guide cover?         | 3 |
| 1.4. | What are the key learnings?        | 3 |
| 2.   | Advice across the retrofit process | 4 |
| 2.1. | An overview                        | 4 |
| 2.2. | Step-by-step guide                 | 5 |
| 3.   | Wider recommendations              | 8 |

# 1. Introduction

## 1.1. Who is this guide for?

This guide is for social landlords planning or delivering low-carbon technology projects in social housing.

It sets out practical recommendations for providing effective energy advice before, during and after installation.

## 1.2. Why does energy advice matter?

Well-planned advice can help social landlords:

- Support tenants to understand and use new technologies confidently
- Improve tenant comfort, trust and engagement
- Reduce avoidable issues after installation
- Help technologies deliver expected energy, carbon and cost benefits
- Get better value from retrofit investment

## 1.3. What does the guide cover?

The guide covers the following key areas:

- How to overcome common barriers faced by social landlords
- What tenants need at different stages of a project
- Practical ways to embed advice across the retrofit journey

The guide draws on Changeworks' research into the challenges and barriers to energy advice during retrofit of low-carbon technology in social housing. You can read the full report [here](#).

## 1.4. What are the key learnings?

Energy advice should be treated as a core part of low-carbon technology projects.

To be effective, advice should be:

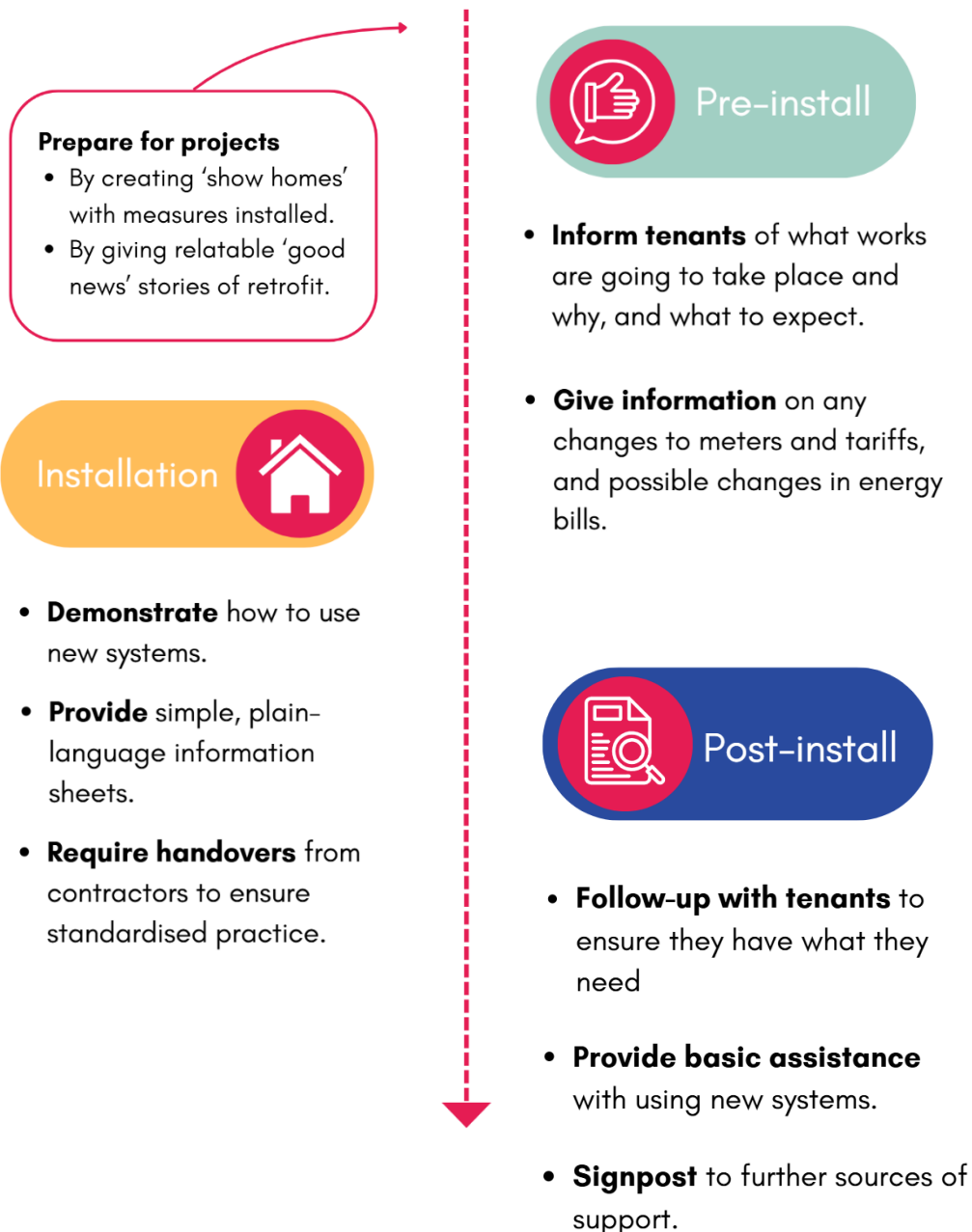
- Timely: provided at key intervals throughout the installation process
- Practical: focussed on how tenants use systems day-to-day
- Tenant-centred: tailored to household needs, concerns and motivations
- Coordinated: agreed across landlords, installers and advice providers

This project was funded by the William Grant Foundation.

## 2. Advice across the retrofit process

### 2.1. An overview

A 'whole-journey' approach should be taken to providing advice and support in order to address issues arising in the research, improve retrofit outcomes and support tenants. This should account for needs of tenants at each stage of the process, as well as continuing after installation is complete. This section details a best practice 'timeline' for advice delivery in social housing retrofit projects, before detailing each stage further.



# Step-by-step guide



## Pre-install

### **Embed advice across the retrofit process**

- Advice and support should be incorporated into projects from the outset, ensuring that it is factored into project costs and timelines.
- Design a monitoring and evaluation plan for the project to understand if the outcomes are met, capture the effectiveness of advice and inform improvements.

### **Consider who is best placed to deliver advice**

- A range of different actors should be considered to support advice delivery design. These should include social landlord staff (repairs and housing teams), installers, manufacturers and third-party advice organisations. When and where these resources are included and the content and method of advice delivery should be carefully considered.
- As part of procurement requirements, contractors should be contracted to give advice and do so in an agreed way; reducing the risk of conflicting advice at later stages.

### **Ensure advice content is tailored to context**

- ‘Good news’ stories should be created and distributed before installation begins. These should feature examples of tenants who have had successful measures installed in their home, to better engage residents and share experience with other tenants.
- Where possible, pilot properties, such as those upgraded during void periods, provide an opportunity to create ‘[show homes](#)’ with measures installed. This would allow tenants to see measures in-person and in-use and to know what to expect from them.
- Tenants should be told what works are going to take place and why, so that they understand what to expect from measures and the installation process. This includes the differences that they should expect from their previous heating systems or ventilation requirements and details of the installation, such as carpet uplift and redecoration requirements. This is most effective when a variety of methods are used.
- Tenants should be informed about any need to change tariffs and arrange for installation of smart meters, to prepare them for later stages. It should be made clear what actions are the responsibility of the tenant and they should be informed of cost implications that may result from consequences of non-action.



## Installation

### **Embed advice across the retrofit process**

- At installation, there is the opportunity to demonstrate the use of new systems to tenants, recognising the benefits of face-to-face practical demonstration and making the most of installers being in the home.
- Implement the monitoring and evaluation plan, capturing any relevant data and asking the tenant about their experience before, during and after installation.

### **Consider who is best placed to deliver advice**

- Handovers from installers are important in tenants becoming familiar with new technologies; these should be required when contracting retrofit works to ensure they are standardised practice. It should be clear what is expected of installers in these handovers and what information should be given. The handovers should be spot-checked by quality assurance teams or clerks of works to ensure the content is accurate and sufficiently detailed.
- At handover, there is the opportunity for relevant staff to attend and ensure that they are given the same information from installers to learn about new systems. Staff members can then act as 'staff champions' and be well placed to assist tenants and other staff. Depending on the project and organisation, this may be tenant liaison officers, wardens or repairs officers.

### **Ensure advice content is tailored to context**

- Instead of large volumes of technical information, simple, plain-language information sheets should be provided, covering the essential information needed for running new systems. These should also cover where to go for further information or advice to create clear communication channels.
- Alongside information sheets, advice should be tailored to tenants' varying needs and learning styles. This may include online instructional videos, virtual tours and face-to-face community events. These resources should include tailored signposting to further information, as well as different languages and materials to support those with relevant physical or learning disabilities.



## Post-install

### **Embed advice across the retrofit process**

- Tenants should have continual access to basic information on how to use any new systems that have been installed in their home. This is particularly important for tenants moving into a home which has been previously retrofitted.
- Analyse monitoring and evaluation data and use findings to provide additional support and to inform delivery of future projects.

### **Consider who is best placed to deliver advice**

- The social housing provider staff should be made known to tenants as the first point of contact regarding new systems.
- Staff should be trained to provide basic assistance with troubleshooting systems and in signposting tenants to dedicated, independent advice when appropriate.

### **Ensure advice content is tailored to context**

- Staff should know where to find further information from independent sources, including useful online materials and videos. This includes pre-existing resources, such as those provided by the [Energy Saving Trust](#) and the [Carbon Co-op](#).
- Tenants should be contacted periodically with support and advice on what energy tariffs most appropriate for their usage and for the technologies installed in their home. It is important to follow-up with tenants to make sure they have done what they need to do.

### 3. Wider recommendations

Change is also needed on a wider scale to improve outcomes for tenants. Based on the results of our research, we have recommended actions to be made at the national level, across the following key areas:



#### Funding models

##### Social landlord-funded projects

- Social landlords should consider developing a business case for investment in advice provision as part of retrofit projects to improve project outcomes and potentially reduce longer-term costs.
- Social landlords should explore funding for the advice element of the project; combining this with wider fuel poverty advocacy work can help to make a case for funding. Third-party advice organisations may be able to support social landlords with grant applications.

##### Grant-funded projects

- Scottish Government should consider extending enabling funding to include advice provision to maximise the impact of retrofit measures and create financial savings for both tenants and landlords.
- Scottish Government should consider including monitoring and evaluation as part of enabling funding, so that outcomes can be measured, further support needs captured and project delivery models improved.
- Scottish Government should consider developing best practice advice delivery models for different project types (e.g. solar PV, batteries, etc) and provide these as guidance within funding schemes, to improve the standards of advice delivery across the sector.



#### Consistent training

- Social landlords should procure installers and other contractors with training from approved training schemes, which cover advice provision and support to households at install.



#### Collaboration networks

- There is an opportunity for social landlords to work together to share expertise and resources, e.g. in neighbouring areas where a social landlord has 'show homes'. This would reduce the costs of delivery.
- Scottish Government should consider the creation of a collaboration space to share learnings from retrofit projects such as SHNZHF, potentially facilitated by an independent organisation.

Changeworks has been leading the way in delivering high impact solutions for low-carbon living for over 35 years.

If you need any support with your retrofit project. Get in touch with the team to discuss how we can help you.

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