NATIONAL RETROFIT HUB



PLACE-BASED RETROFIT IN PRACTICE

GUIDANCE FOR DEVELOPING A PLACE-BASED RETROFIT STRATEGY

ABOUT THE GUIDE

This document offers practical guidance to help local actors develop a place-based retrofit strategy and enable delivery on the ground. The guide is designed as a collaborative tool for those involved in, or looking to support, place-based retrofit. It supports those working within local and combined authorities to understand how to initiate, develop and deliver place-based approaches. It also supports organisations working at neighbourhood level to engage with a place-based approach and understand how it connects to the wider system.

About the project

The National Retrofit Hub (NRH) is collaborating with the UK Green Building Council (UKGBC) and Energy Demand Research Centre (EDRC) on a project that investigates effective place-based approaches to retrofit. Supported and funded by The MCS Foundation, the project aims to build a replicable, scalable framework that engages and empowers actors at all scales, including national and local governments, community groups, built environment service providers, and citizens. The project will develop outputs that reflect the diversity of contexts and approaches to place-based retrofit. This should enable practitioners to design retrofit strategies which meet the needs of their communities.

CITATION

National Retrofit Hub. Place-Based Retrofit in Practice: Guidance for Developing a Place-Based Retrofit Strategy. April 2026.

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DATE OF PUBLICATION

April 2026

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The National Retrofit Hub

The National Retrofit Hub (NRH) is a Community Interest Company focused on improving how housing retrofit is delivered equitably at scale. We do this by convening the retrofit community, building and sharing evidence on what works, and supporting action that leads to better outcomes for people, homes, buildings, and places.

In partnership with

Energy Demand Research Centre

The EDRC undertake research for an affordable and secure low energy future. Our interdisciplinary research programme identifies evidence-based energy demand reductions for a sustainable and more equitable future. We work closely with partners from policy, industry, civil society and academia.

UK Green Building Council

UKGBC is the membership-led industry network radically transforming the sustainability of the built environment. We represent the unified voice of our industry's current and future leaders who are working together to deliver a just transition across the sector, in response to the climate and nature crises.

Supported by

The MCS Foundation

We were founded to oversee the MCS standards scheme which certifies the quality of renewable energy across UK homes. We support and develop action-orientated programmes to address critical issues like retrofitting UK homes at scale, and expanding the skills-base that our sector urgently needs. And we commission robust, independent research that informs and shapes better decision making to drive a carbon free future for all UK homes.

Energy Demand Research Centre (EDRC) is supported by the Engineering and Physical Sciences Research Council and the Economic and Social Research Council (grant number EP/Y010078/1).

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GLOSSARY

TERM	DEFINITION
Anchor Organisations	• Large, place-based organisations with a strong connection to their local area and a role in supporting community wellbeing. Examples include councils, NHS organisations, community hubs, universities and charities.
Area-Based Schemes (ABS)	• Area-Based schemes deliver retrofit within a given area by working across more than one home, such as street-by-street or 'neighbourhood' retrofit.
Hyper-Local	• The hyper-local is a unit or scale which refers to a small geographical area such as a street.
Intermediary	• Intermediaries can facilitate place and area-based retrofit, usually within a neighbourhood to district level. They can be a singular organisation, or a partnership of multiple and are more likely to be defined by the role that they play or partnerships that they bring together.
Neighbourhood	• A local area larger than a street, but smaller than a town or city. The scale can vary depending on context.
Retrofit Facilitation Provider	• An organisation or service that supports people through the retrofit process, bringing together key steps such as advice, assessment, design, contractor coordination and, in some cases, access to finance.
Social Marketing	• Using marketing principles and techniques to change or encourage behaviour that benefits individuals and/or society. Social marketing is people-centred, based on a good understanding of the audience, to create social action.
Social / Civic Infrastructure	• The physical, organisational and relational facilities that support people to form social networks and to shape their own lives. It allows people to build strong relationships and engage in the issues that matter to them. This might include community centres, libraries, parks, pubs, voluntary groups, community businesses, networks and senses of shared identity. Civic infrastructure also incorporates the elements that enable democratic participation and collective agency.
Sense of Place	• The personal and collective relationship between people and the place they live. This includes attachment (the emotional bond to a place), identity (how being from or in a place shapes your sense of self), and dependency (that being in the place allows someone to do what matters to them). Culture, heritage, and community all influence the sense of place.

USING THIS GUIDE

Who is the guide for?

This guide is for those working at a local level who are involved in, or interested in, using a place-based approach to improve homes, buildings and places. It supports collaboration between local actors, including:

- Local authorities
- Community organisations
- Local anchor and public institutions
- Housing Associations
- Retrofit Facilitation Providers (RFPs)
- Trusted intermediaries

It is also relevant for those working towards outcomes such as:

- Housing related justice
- Improvements to the built environment tailored to local needs, including public health, regional economies, and climate resilience.
- Strengthened local partnerships and collaboration between stakeholders.
- The integration of community voices, and civic infrastructure into decision-making processes around housing and retrofit.
- Progress towards Net Zero
- Reduction in energy bills and fuel poverty for residents

Structure of the Guide: What's Included?

01 - An Introduction To Place-Based Retrofit
Overview of what place-based retrofit is and why it matters

02 - Planning And Designing A Place-Based Retrofit Strategy
Key considerations and starting points for shaping an effective strategy.

03 - Components Of A Place-Based Retrofit Strategy
Overview of the core elements that support delivery, including advice and delivery routes.



EXECUTIVE SUMMARY

01 - An Introduction to Place-Based Retrofit

Place-based retrofit strategies bring together the partnerships and foundations needed to make retrofit work locally. They support both citizens and practitioners to shape delivery, increase uptake, and respond to the realities of each community.

Why take a place-based approach?

Place-based approaches allow those responsible for coordinating or supporting the delivery of retrofit to move beyond fragmented, top-down and market-based schemes. They help create resilient retrofit systems, which are locally coordinated and governed, and connected to wider support systems. Place-based strategies are responsive to the unique characteristics, contexts and needs of different places.

02 - Planning & Designing a Place-Based Retrofit Strategy

2.1 Defining the Geographical Scope

Place-based initiatives might need to define a geographic area within which strategy and delivery are coordinated. This may form part of a wider municipal programme or take the shape of a more grassroots initiative within a specific neighbourhood. It could align with a clearly defined geography, while remaining flexible where external partnerships can support local delivery. Key factors to consider when defining the geographical scope include:

- Designing the scope of strategy around social and civic infrastructure by identifying existing communities of practice, and using a social marketing approach.



- Understanding the reach and capacity of local stakeholders and partners, in addition to other practical considerations, such as the diversity of local housing archetypes.
- Aligning with and maximising opportunities associated with governance and administrative boundaries, such as funding opportunities linked to the creation of Neighbourhood Plan's as part of the Pride in Place Strategy, for example.

2.2 Stakeholders, Roles & Responsibilities

Building strong partnerships between citizens, community organisations, the supply chain and local government is a core part of delivering a place-based approach. This involves bringing partners together, understanding and using their respective strengths, and establishing clear ways of working collaboratively:

- Identifying and involving a diverse set of stakeholders from different sectors, local communities and the supply chain, ensuring the equitable distribution of decision-making and opportunities to participate.
- Understanding which local actors are able to take a more active role, and allocate responsibility accordingly while simultaneously building capacity among local partners in the long-term.
- Stewarding partnerships and enable long-term collaboration using methods such as independent facilitation, non-adversarial contracts, regular and transparent communication, as well as the creation of a shared vision.

2.3 Building a Deep Understanding of Place

A deep understanding of place is required to ensure that outcomes can be tailored to the needs of the place, while supporting and developing the resources of the place. Starting with this understanding will maximise opportunities to deliver effective climate resilience, public health improvements, strengthened supply chains, good jobs and robust local economies.

This understanding should build a picture of the local retrofit system, including its wider supply chains:

- This includes using a diverse range of sources and stakeholders, including information gained through lived experience and other forms of local knowledge, in addition to technical expertise.
- Strategies should explicitly map external factors contributing to local energy vulnerability, including pressures on energy costs, materials and labour supply, to ensure these are tracked and addressed rather than overlooked.

03 - Components of a Place-Based Retrofit Strategy

3.1 Creating Delivery Channels

In a place-based strategy, different methods can be used to optimise, enable and aggregate the actual delivery of retrofit works. This might include setting up new delivery vehicles and/or working with existing businesses and supply chains. This may include a mix of individual pathways for households, through advice hubs, for example and more coordinated approaches such as area-based schemes. Different approaches may be needed across neighbourhoods or housing types.

3.2 Involving and Developing the Supply Chain

A fundamental element of a place-based retrofit strategy includes having a plan to develop the local supply chain, including skills, jobs, business support, local materials and products and access to national supply chains.

3.3 Community Engagement, Participation and Involvement

Place-based approaches should aim to put residents and communities at the heart of decision-making, building buy-in and raising literacy around retrofit.

Practitioners should ensure that the outputs of these activities lead to equitable and co-designed strategies and targeted outcomes. Part of the work of a place-based retrofit strategy will be to demystify retrofit, and allow citizens to touch, see and feel the process and its benefits.



3.4 Coordinating Place-Based Finance

Financial solutions should be designed to meet the needs, and work with the resources, of a place. Many places are already engaging with blended funding streams, to bring together different types of funding to create a larger pot to deliver more ambitious projects with multiple outcomes. It is likely a place-based finance strategy will combine methods including grassroots and community finance, place-based or bioregional finance, and national finance.

3.5 Creating an Evaluation Framework

Evaluating the success of place-based work might include using participatory methods to identify the specific outcomes which might be measured as part of your place-based retrofit programme. This approach would enable the adaptation of monitoring and evaluation approach to the place, rather than fitting outcomes into predefined metrics which may not necessarily reflect your goals.

Setting aims alongside cross-sector stakeholders, place-based groups and residents should be integrated from the beginning of the journey and revisited as the programme develops.

A full evaluation framework can be found at the end of this guide.

AN INTRODUCTION TO THE CASE STUDIES

Many local authorities, organisations and grassroots actors are already demonstrating thoughtful and imaginative place-based approaches to retrofit. The case studies featured throughout illustrate emerging good practice and build a broader picture of what place-based approaches can achieve.

They also show how different initiatives can inspire action in other contexts, helping to strengthen local capacity for retrofit delivery and give greater agency to local partners.

ACKNOWLEDGEMENTS

We thank contributors and reviewers for their time and input in sharing their experience, participating in the project and shaping this report. You can find out more about each of the case studies directly through the links included in the map.

- Jonathan Atkinson, **Carbon Coop & People Powered Retrofit**
- Tim Crabtree, **Wessex Community Assets**
- Jo Hutchings, **Swansea University**
- David Nugent, **Canopy Housing**
- **South West Procurement Alliance, LiveWest & WestCountry Maintenance Services**
- Alice Brown & Rafe Bertram, **Retrofit Kentish Town**
- John Christophers & Sara Kathun-Mia, **Retrofit Balsall Heath**
- Melissa Mean, **WeCanMake**
- Andrew Rice, **The MCS Foundation**
- Paul Chatterton, **Climate Action Leeds**
- Matthew Clubb, **MwClubb**
- Emily Fifield and Vic Wakefield-Jarrett, **Eastside Community Trust**
- **Leeds Council**
- Helen Langley, **Dudley Council**
- **Kirklees Warm Zone**
- **RetrofitWorks**
- **London Councils**
- **Brodie Weir, CIVIC SQUARE**
- **Sheffield Energy Hub**



1. **Kirklees Warm Zone**, West Yorkshire
2. **Retrofit Kentish Town**, London
3. **Retrofit Balsall Heath**, Birmingham
4. **Canopy Housing**, Leeds
5. **Carbon Coop & People Powered Retrofit (Levenshulme ABS & Calderdale Retrofit Challenge)**, Manchester & West Yorkshire
6. **East Midlands Combined Authority**, East Midlands
7. **Climate Action Leeds**, Leeds
8. **Tai Tarian Housing Association**, Neath Port Talbot
9. **RetrofitWorks**, London
10. **Oxton Community Retrofit**, Scottish Borders
11. **Treneere Estate Project**, Penzance
12. **Wessex Community Assets & The Bioregonal Learning Centre**, Dorset & Devon
13. **Dudley Council**, Dudley
14. **Eastside Community Trust**, Bristol
15. **WeCanMake**, Bristol
16. **London Councils**, London
17. **Leeds Council**, Leeds
18. **CIVIC SQUARE,** Birmingham
19. **Sheffield Energy Hub**, Sheffield

01
AN INTRODUCTION TO PLACE-BASED RETROFIT

This section introduces place-based retrofit, what it means in practice and why it matters. It also sets out the wider policy context.

WHAT IS A PLACE-BASED APPROACH TO RETROFIT?

A place-based approach to retrofit focuses on how homes, people and local systems connect within a defined area. It brings together partnerships, local knowledge and delivery capacity to shape retrofit in a way that reflects the needs of that place.

Rather than applying a one-size-fits-all model, it allows retrofit to respond to local housing, infrastructure, communities and priorities. At its core, it is about shifting from delivering isolated measures to building coordinated local systems that support long-term outcomes.

"[Place-based approaches] centre on a recognition of the need to reconfigure relationships between governments, philanthropy, civil society organisations, the private sector and citizens in order to achieve change by developing collaborative approaches to address the underlying causes of community problems.

Part of the purpose of place-based approaches is to build the capacity of the community to take charge of its own future, to speak for itself, and to build social capital and connections within the community. They are comprehensive programmes or strategies working with a range of partners to address multiple causes of social problems in a locality." Lankelly Chase[1].



1 Lankelly Chase. Historical Review of Place-Based Approaches. 2017

FOUR PRINCIPLES

In our report 'Understanding Place-Based Retrofit,' we explored what the approach involves. This understanding was built through engagement with our network and a collaborative stakeholder workshop, leading to **four principles which should inform the approach in practice**:

1. *Collective Governance & Partnership Working.* A role for all: Place-based partnerships should fairly redistribute decision-making.

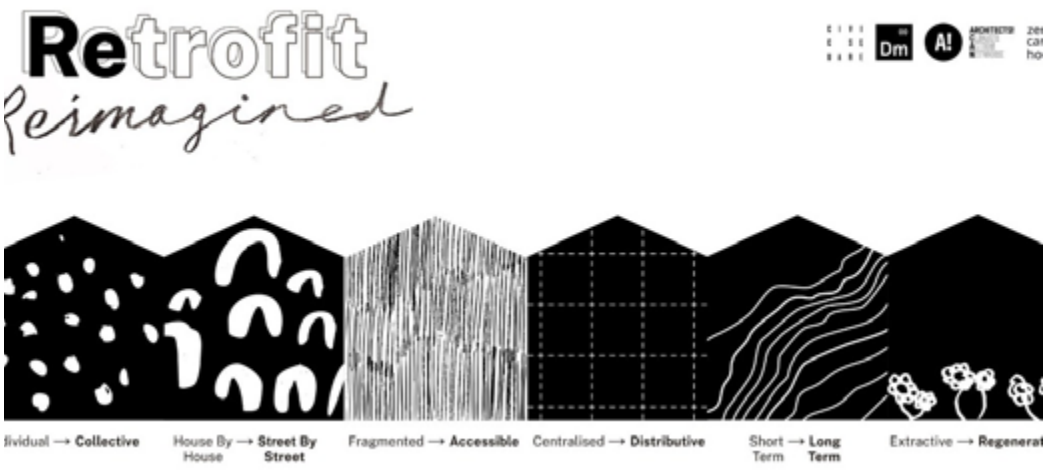
2. *Collaboration, Involvement & Participation.* *Collaborators, not recipients: co-design should form an important part of a place-based approach.*

3. *Place-Based Knowledge & Experience. Evidence grounded in place: place-based retrofit should integrate knowledge gained through lived experience of a place with technical and specialist insights.*

4. *Mutual & Reciprocal Relationships*. *Designed for reciprocity: place-based approaches should steward relationships built on trust - giving back to each other rather than just taking from.*

RETROFIT REIMAGINED - SIX SHIFTS

As part of the Retrofit Reimagined project, six shifts needed to transform our approach to retrofit were identified. Many of these represent a change that place-based retrofit should embody.



WHY TAKE A PLACE-BASED APPROACH?

Place-based approaches present an opportunity to go beyond the limitations of the business-as-usual approach. Top-down and market-led approaches to retrofit have faced challenges in delivering consistent, high-quality, and locally responsive outcomes. This reflects issues such as political and market uncertainty, limited community engagement and underdeveloped local supply chains.

Many schemes have focused on 'outputs' like 'energy efficiency measures installed', rather than 'outcomes' like energy bill reductions and warmer healthier homes, the NRH has explored this trend in Measuring for Success?

- The Energy Company Obligation (ECO) and the Great British Insulation Scheme (GBIS) highlight some of the failings of 'Business as Usual' retrofit, eroding trust in retrofit due to poor delivery.

  "Changes to Government energy saving programmes in the UK contributed to a 53% drop in the annual level of investment and an 80% reduction in the number of improvement measures installed in homes between 2012 and 2015" - Frontier Economics.[2]

- Prior to the widespread publication of ECO failures awareness and understanding of the scheme was low:

  "Almost two thirds (64%) of homeowners had not heard of the Energy Company Obligation (ECO) scheme. Of homeowners that had heard of ECO almost three quarters (74%) of those on benefits either didn't know whether they were eligible or incorrectly stated that they weren't eligible." Citizens Advice, Insulation Nation[3]

- A lack of meaningful engagement and understanding of local and occupant needs means that, even when works are provided at no-cost, residents opt-out.

  Almost half of Winchester City Council tenants refused Social Housing Decarbonisation Fund (SHDF) work, to make their homes more energy efficient.[4]

2 Frontier Economics. Affordable Warmth, Clean Growth. 2017
3 Citizens Advice. Insulation Nation. 2022
4 Hampshire Chronicle. Almost half of Winchester City Council house tenants refuse upgrades. 2024

THE URGENCY & STATE OF HOUSING

In England **15% of homes fail to meet the Decent Homes Standard**, and **at least 1.4 million have problems with damp and mould**[5]. With **3.2 million households struggling to keep comfortably warm in winter**[6], we urgently need to rethink the system to deliver health and comfort outcomes for all. Arup and The CCC predict that **at 2° of warming above pre-industrial levels 90% of UK homes will be at risk of overheating**[7], highlighting the need for place-informed strategies that bake-in future resilience.

Under-performing homes don't just put individual occupants at risk, they impact public health spending, employment, social care, national fuel poverty, net zero targets, and more.

WHAT CAN PLACE-BASED APPROACHES ENABLE?

Place-based approaches provide an opportunity to build a broader culture of care and repair by building a deeper connection between people and their buildings. Beyond national programmes which feel relatively abstract, they create an avenue through which citizens can touch, feel and see the many potential benefits that retrofit can bring to homes and neighbourhoods.

They can broaden the benefits of retrofit, including improvements in public health and climate resilience. This includes drawing on local knowledge, strengthening partnerships and supply chains, improving access to decision making, and addressing wider environmental impacts.

5 Ministry for Housing, Communities and Local Government. English Housing Survey 2024 - 2025. 2026

6 Ministry for Housing, Communities and Local Government. English Housing Survey 2023 - 2024. 2025

7 Arup. Addressing Overheating Risk in Existing UK Homes.

"For decision-makers, [place-based retrofit] offers the potential to deliver solutions which address multiple problems and to build solutions which fit the circumstances and cultures of the places rather than trying to adjust the place to fit the solution"

- Marsden et al., (Re)locating Place in Energy Demand. 2025

"A recent appraisal of the economic costs of net zero across six city regions found that place-based delivery requires only 25% of the investment of a place-agnostic approach and creates about twice the level of energy cost savings and social benefits."

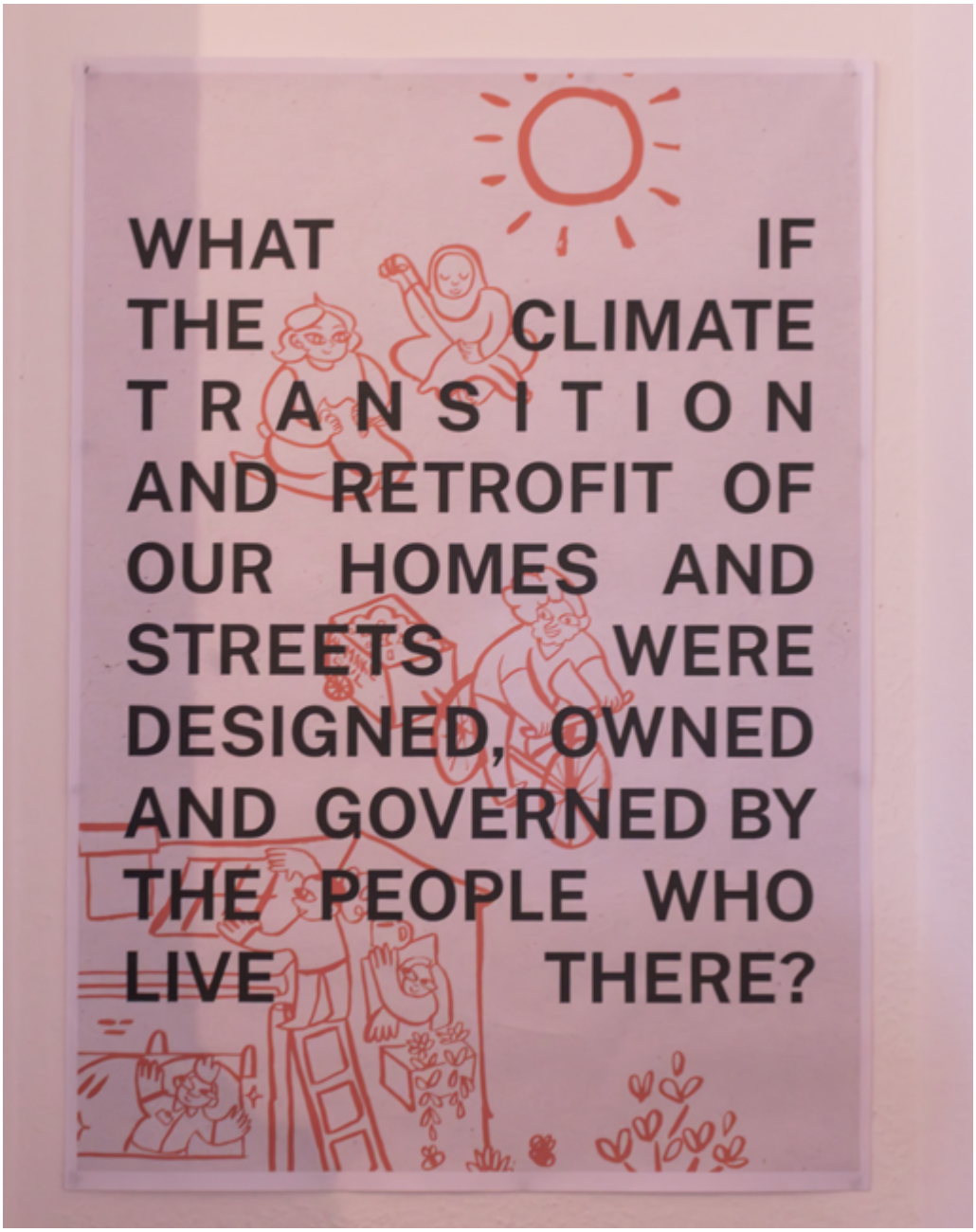
- Accelerating Net Zero Delivery, UKRI cited through A Blueprint for Warmer Homes, New Economics Foundation



THE RETROFIT POLICY & FUNDING LANDSCAPE

The Warm Homes Plan, Pride in Place Strategy, Local Power Plan and wider devolution agenda present a significant opportunity and catalyst for place-based retrofit to flourish.

Together, they could help build resilience and momentum within local retrofit systems. Initial public investment should drive a shift towards to decisions being made as locally as possible. By enabling locally led decision-making, fostering strong partnerships and sustaining equitable governance, retrofit delivery could generate positive multiplier effects over time.



EMERGING OPPORTUNITIES FOR PLACE-BASED RETROFIT



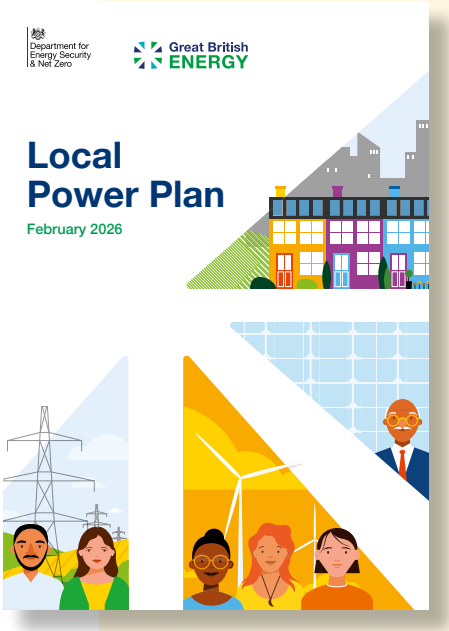
The Warm Homes Plan

- Support for local partnerships
- Tenure neutral and area-based delivery
- The creation of the Warm Homes Agency and its future role in building trust and supporting retrofit delivery through information, redress routes and capacity building.



The Pride in Place Strategy

- The creation of neighbourhood boards as locally representative decision-making channels with the powers to allocate funding
- Pre-approved interventions such as green retrofits to public, community and residential buildings, in addition to the creation of local retrofit services or energy advice hubs



The Local Power Plan

- Direct support through Great British Energy for capacity & capability through expert advice, direct funding & finance, and scalable business models
- The creation of public-commons –partnerships through new local government & community (co) owned renewable energy assets - in addition to direct support for community-led and owned projects

02
PLANNING AND DESIGNING A PLACE-BASED RETROFIT STRATEGY

This section explores three cross-cutting elements which underpin the creation of a place-based retrofit strategy. These are fundamental considerations and steps to start and enable an effective place-based retrofit strategy. The steps in this chapter should help you to begin developing a strategy by establishing partnerships, building civic capacity and understanding your place. We cover:

- How the geographical scope of a place-based approach might be considered and defined
- The creation and stewardship of partnerships, including how roles and responsibilities can be allocated
- Building a deeper understanding of the place and retrofit system

WHAT DO WE MEAN BY A PLACE-BASED RETROFIT STRATEGY?

A place-based retrofit strategy brings together plans to identify, create and develop the social, technical, ecological and financial resources needed to enable retrofit and related interventions. These resources support delivery that responds to local needs.

The strategy sits within the context of wider housing and built environment planning. The Energy Demand Research Centre (EDRC) has explored how sub-regional governance can coordinate multiple area-based schemes to support effective delivery.

In A Plan for Places, the EDRC has explored how sub-regional governmental bodies could co-ordinate multiple area-based schemes to deliver retrofit effectively and equitably. By learning from the Housing Action Area's of the 1970s and 1980s, the authors suggest how retrofit delivery can be transformed from a fragmented, market-based model to one led and managed by local government.

Further guidance on strategy making is available from the Local Government Association, and as part of the Local Area Retrofit Accelerator Tool-kit.



2.1 DEFINING THE GEOGRAPHICAL SCOPE

Place-based initiatives define a geographic area within which strategy and delivery are coordinated. This may form part of a wider municipal programme or take the shape of a more targeted or grassroots initiative within a specific neighbourhood. The approach might align with a clearly defined geography, while remaining flexible where partnerships or considerations beyond the immediate area support delivery and outcomes.



Kirklees Warm Zone, West Yorkshire

Description: Kirklees Warm Zone was a local authority led retrofit programme, built around the principle of **universal eligibility across the local authority area**. Free loft and cavity wall insulation were offered to every suitable home in Kirklees, regardless of income. Within the local authority area, **delivery was phased through multiple area-based schemes**. To do so, the district was divided up into neighbourhoods. All households across the district were visited ward-by-ward, street-by-street

Outcomes: The ward-by-ward and street-by-street approach was felt to be efficient. It meant that **demand and work flows for assessors and contractors could be managed**. In addition, it meant that **areas with higher levels of need and deprivation could be targeted first**, and **communications about the scheme could be tailored to individual neighbourhoods**.

A full evaluation and description of the programme can be found here.

POTENTIAL CONSIDERATIONS

When defining the geographical scope of a place-based retrofit approach, consider how it reflects the characteristics of the place and supports delivery in practice. The area should be small and stable enough to coordinate activity and enable oversight, while also flexible enough to connect with the wider systems that support delivery.

The following activities can be used to help define scope, either individually or through stakeholder workshops. Each includes prompts to support discussion:

SOCIAL & CIVIC INFRASTRUCTURE

Map local community and retrofit networks. Which community networks, hubs and groups are active in the area? This might include community centres, faith groups, local forums, retrofit hubs or advice services.

Understand and build upon local sense of place. What social and cultural factors shape the area, such as local identity, heritage or shared spaces? Where are there nodes of focus, and how far to their emotional and phycological ties reach?

Use a social marketing approach. What relationships already exist between residents, organisations and the supply chain? For example, trusted installers, local landlords, or community-led projects. How can these relationships be used to understand the spatiality of the local retrofit system?

Identify capacity for civic or public-led organisation and involvement. Where there are fewer established networks, can local institutions such as councils, housing associations or anchor organisations play a stronger role in coordinating activity?

OPERATIONAL & PRACTICAL CONSIDERATIONS

Identify relevant partners. Who will be involved as a partner in co-coordinating the strategy and what is their reach? Will local authority's co-ordinate the strategy at a unitary authority level, or what flexibility might be possible where community groups and contractors operate across multiple administrative boundaries?

Understand the capacity of key stakeholders to engage. What is a reasonable distance that residents, local organisations, and SMEs can be expected to travel to be able to participate?

Understand your capacity. How heterogeneous is the housing stock within the area being considered? Can the areas aggregate support for multiple targeted retrofit programmes for different archetypes, for example in the co-ordination of multiple area-based programmes?

GOVERNANCE & INSTITUTIONAL INFRASTRUCTURE

Identify options for funding and support. What funding is available, and where can support be accessed? This may include national schemes, local funding, or partnerships with investors and other organisations.

Use regulatory or governmental influence. Where can local or municipal authorities influence, regulate or deliver services that support retrofit?

Understand influence among partners. What do you and collaborators have agency over? - Such as privately, socially or community owned housing stock, for example. In what cases will the area need to be wider than that, and where might additional collaborators need to be brought in to extend agency and ability to steward land, housing and the retrofit system?

Consider relationships with other institutional actors. What relationships with other institutional actors might need to be considered? Is it a nested approach where the strategy is part of or supported by a wider strategy led by a combined authority or devolved nation possible? (For example, the co-ordination of Area Based Schemes in Scotland, or Retrofit Greater Manchester).

Consider existing place-based plans. Can the approach link to or build on existing community, neighbourhood or local authority plans?

The Pride in Place Strategy

The Pride in Place Strategy requires local authorities to establish neighbourhood governance structures in areas receiving funding. This creates an opportunity to support retrofit and local advice services within these areas. Place-based practitioners should understand how these structures operate locally, and how they can inform or align with their own approach.

You can find more in-depth information through the *Pride in Place Governance and Boundary Guidance*.

Retrofit Kentish Town, London

Description: Retrofit Kentish Town is a community benefit co-operative formed by a group of residents working towards the retrofit of homes within Kentish Town and surrounding areas within the London Borough of Camden. Members highlighted challenges in defining the area within which works would be coordinated. This included a desire to maintain inclusivity and open participation, while creating a project which would be manageable. Recognising that **proximity was an important factor in raising accessibility and buy-in**, the group decided that it had to be reasonable for members to be able to make it to meetings, and to resonate with the neighbourhood.

Outcome: The co-operative defined its working area using a group of postcodes, creating clear boundaries that made coordination more manageable. Residency within these postcodes is required for membership, while those outside the area can still attend events. This approach balanced inclusivity with practicality, ensuring the area was small enough to coordinate activity, while still allowing wider community engagement. It also shows how defining a place can evolve over time, moving from informal networks to more structured boundaries.

Retrofit Balsall Heath, Birmingham

Description: Retrofit Balsall Heath (RBH) is a Community Benefit Society and a resident-led movement aimed at reshaping the neighbourhood from the ground up. Born from grassroots determination, the initiative was built on the combined deep local knowledge of partners including **MECC Trust**, **Bahu Trust** and volunteers. The geographical scope and area of Retrofit Balsall Heath aligns with Balsall Heath's Neighbourhood Development Plan, prepared by The Balsall Heath Neighbourhood Planning Forum in accordance with the requirements of the **Localism Act 2011**. This Plan was designed to guide the City Council and other interested parties (including developers) in their decisions about development in the area, through to 2031.

Outcome: Aligning with the Neighbourhood Development Plan provided a clear and recognised boundary for action, helping to define the scope of activity and link retrofit to wider local priorities. Working together across different parts of the community has led to stronger partnerships, increased trust, and a shared sense of ownership over local change. This collaboration has enabled more coordinated action, pooled knowledge and resources, and built momentum for resident-led retrofit initiatives across the neighbourhood.

2.2 STAKEHOLDERS, ROLES & RESPONSIBILITIES

Building strong partnerships between citizens, community organisations, the supply chain and local government is a core part of delivering a place-based approach. This involves bringing partners together, understanding and using their respective strengths, and establishing clear ways of working collaboratively.

In practice, this often starts by identifying who is already active locally, such as trusted community groups, local authorities, delivery partners or installers, and understanding the role they can play. A place-based retrofit strategy brings these actors together to support, co-design and participate in delivery.

The Warm Homes Plan

Support for local partnerships is one element of the Warm Homes Plan. With strong emphasis on collaboration between energy suppliers, housing associations, gas networks, community energy organisations, and third-sector partners, the plan also highlights the need for closer working between Distribution Network Operators (DNOs), local authorities, and mayoral strategic authorities.

- The Warm Homes Agency is expected to partner with existing organisations, including advice providers, installers, manufacturers, retrofit companies and Trade Unions. This includes supporting training initiatives such as the Heat Training Grant, as well as helping to understand and respond to market demand.
- Local Authorities are critical actors in planning for change. The WHP emphasises the importance of their local coordination and understanding of housing stock, communities and supply chains. The Energy Saving Trust highlights that "*existing net zero strategies, regeneration plans, public health duties, and Local Area Energy Plans (LAEPs) are positioned as core building blocks for delivery.*"

INVOLVING A DIVERSE SET OF PARTNERS & EQUITABLY DISTRIBUTING AGENCY

This includes considering how to develop these partnerships so that they can effectively redistribute agency among local stakeholders, be inclusive, and embed trust so that they flourish long-term and are impactful. This is a key part of working with the system, ensuring that the system works efficiently and spreads the benefit.

Involving partners that already hold trust within the community and supply chain helps strengthen relationships and build on what already exists. This can improve engagement and create more opportunities for people to come together and collaborate. Evidence[1] suggests that using social marketing and working through existing ties between actors has been found to be an effective method for influencing behaviour change for individual and social benefit.

1 Davis, M., et al. Towards a relational sociology of retrofit. 2025



BUILDING A COALITION: MAPPING KEY STAKEHOLDERS AND STEWARDING PARTNERSHIPS

Map the Retrofit System and Key Social & Civic Infrastructure

Mapping the wider retrofit system can help you to identify key stakeholders and partners who should be involved in co-designing the strategy. Existing resources such as mapping by Dark Matter Labs and CAG Consultants provide a good starting point.

Effective stakeholder engagement depends not just on who is involved, but where engagement takes place. Community halls, libraries, faith buildings, and other shared spaces play a practical role in building partnerships and keeping decision-making visible and accessible to stakeholders and residents.

- Practitioners should **map which spaces different groups in their area already use and trust, and design engagement activity around those spaces**, rather than expecting residents and stakeholders to come to unfamiliar settings. This is particularly important for reaching beyond the early adopters who tend to self-select into retrofit programmes.

- Additionally grassroots and community organisations can use civic tools such as power mapping. This can help you to **identify where decisions about retrofit are made and to pinpoint opportunities for forming strategic partnerships**.

- **Taking a cross-sectoral approach** also means looking beyond obvious venues. Spaces associated with public health: GP surgeries, children's centres and food banks, may offer access to residents who would never attend a retrofit-specific event, and can help frame retrofit as part of a wider conversation about health and wellbeing. Asking 'where does retrofit need to be?' is as important as asking 'who needs to be involved?



The Local Power Plan & Pride in Place Strategy

As part of the **Local Power Plan**, there will be opportunities to create new local government and community (co)owned renewable energy assets. Local government will be able to apply for partnership grants for joint projects with local community energy groups. Additionally, members of local communities will be supported to buy into clean energy projects ran by their local council, and larger-scale commercial projects.

The **Pride in Place Strategy** includes the creation of neighbourhood governance structures in areas in receipt of the fund. These neighbourhood boards will aim to be inclusive and representative, led by the local authority and chaired by a representative from the community. Members from the community such as faith groups, local charities, and community enterprises, will be invited to sit on the board and make key decisions about how funding is allocated. If you are working on a place-based retrofit strategy, you might want to consider how to raise awareness of how retrofit can help your neighbourhood board achieve its outcomes.

Encourage Network Building

A place-based strategy should prioritise activities that bring different actors together, creating opportunities to connect and build partnerships.

Place-based retrofit initiatives should be an iterative process, which proactively grow and change alongside the communities, neighbourhoods, supply chains and places in which they operate. This might mean asking "*Who is missing from the room?*" At the start of stakeholder meetings, and growing the participation list accordingly.

Dismantle Siloed Approaches & Partner with Diverse Actors

A place-based approach connects actors across different levels of influence, authority and scale. This includes relationships between:

- Organisations working at different scales, such as local, regional, national actors
- Differing levels of authority, such as public, industry or civic-led organisations
- Different sectors, departments and agencies

A broader definition of community includes professionals and organisations working within the place, as well as those in the wider supply chain. Strengthening social infrastructure creates more opportunities for new groups to form and



SUGGESTED STAKEHOLDER CHECKLIST

This list may act as a starting point which can be tailored to local context.

Public Sector & Local Delivery	• Local authority departments, such as public health, housing, and net zero
	• Arm's Length Bodies and Data Services
	• District Network Operators
Community & Civic Groups	• Community energy and retrofit group
	• Non-formalised resident groups
	• Formalised community groups
Supply chain and delivery partners	• SMEs and local contractors
	• Industry bodies, including unions and procurement groups
	• Retrofit Facilitation Providers, and One-Stop Shops etc.,
Education and research	• Colleges and Training Providers
	• Universities and Researchers
Anchor institutions	• Schools, GP practices and libraries



"There is a big opportunity here – but also a challenge. How can emerging government policy work with and unlock the huge potential of community power to achieve shared goals – without crowding out and seeking to control what makes community anchor work special?"
- Community Powered Neighbourhoods, Locality

Identify roles and understand who has capacity to take on more leadership

Place-based strategies reflect the organisations involved, their interests, influence and capacity. Leadership may sit with local authorities, community groups, SMEs, supply chain actors or a partnership between them.
In practice, this depends on who already has:

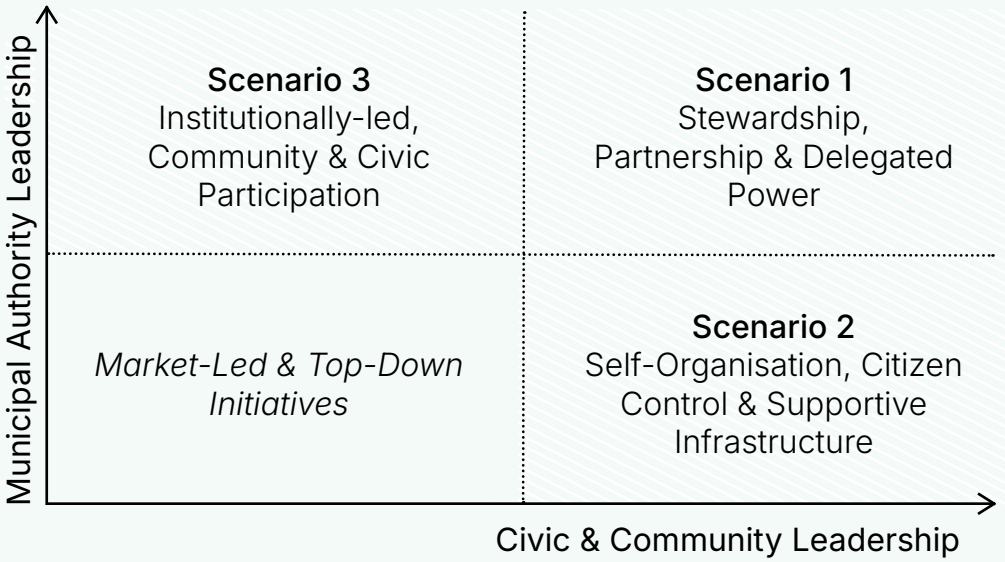
- Trust within the community
- Capacity to coordinate activity
- Reach across partners and networks
- Influence over funding, delivery or decision making

In practice, this starts with understanding who is already active locally, their capacity, and how roles could be shared or developed. In some areas, community organisations may be well placed to lead. In others, local authorities or intermediary partnerships may take a coordinating role, while ensuring strong citizen involvement.

At larger scales, there is a risk that activity can become too centralised, limiting opportunities for smaller organisations to participate. Effective coordination helps maintain space for different actors to contribute.

Leadership is likely to evolve over time, often starting with established institutions and shifting towards greater community involvement as capacity grows. Several archetypes for the types of actors and their capacities are highlighted in the NRH's CHIA workbook.

Place-Based Approaches



Scenario 1: Place-based strategies are coordinated by a close partnership of local actors, such as local authorities, SMEs, and community groups.	Local authorities coordinate the approach, working closely with community groups, SMEs and supply chain partners. This is often where local networks exist but have limited capacity to lead. The focus is on alignment, early collaboration and building trust in community partners, supporting partners them to take on a more active role over time.
Scenario 2: SMEs, Grassroots and neighbourhood initiatives lead, strengthened through support from municipal authorities.	Existing networks of residents, community organisations and SMEs take a leading role. Local authorities support through funding, resources or coordination. This may include building on existing initiatives, testing approaches at neighbourhood level, or scaling successful local activity. Alternatively, local authorities might work with local organisations and areas with known strong social networks to design, trial or build up existing neighbourhood or whole-street schemes. Local authorities should commit additional resource to support existing communities to develop resilience for sustained action and build capacity
Scenario 3: Where there are significant barriers to civic participation, local authorities and trusted intermediaries should take a more active role, and focus on building long-term capacity.	Where local networks are less established, local authorities or trusted intermediaries take a stronger coordinating role. The focus is on building relationships, creating opportunities for participation and developing long-term capacity. This may involve working through existing community spaces, local groups or alternative entry points such as sports clubs, parks, libraries or allotments to build trust and engagement. Capacity building could include mentoring or developmental support.



Canopy Housing and Leeds City Council, Leeds

Description: Canopy Housing is a Leeds-based housing charity that retrofits empty properties into decent, affordable homes for people who are homeless or in need of housing. Working with volunteers, they use a self-help model where future tenants become a part of the team and gain access to training in retrofit throughout the renovation. After gaining compulsory purchase powers during the Urban Renewal Areas programme during the late 1990s, the council leased Canopy their first properties, derelict back-to-backs and terraces that had been acquired, in return for Canopy agreeing to bring them up to a habitable standard and let them to people from the council's waiting list. During the early 2010s Canopy applied for capital grants to then help buy its first properties. 30% towards the purchase and retrofit costs, renovating 14 properties through the empty homes programme.

Over time Canopy Housing and the council have built a long-term relationship which has enabled access to resources, and with the regeneration and housing team in particular.

Outcomes: Trust between the two partners has meant that the initial five-year leases on the properties have been extended to 99 years. Canopy Housing have expressed the possibilities that this has opened up in terms of financial security. Two thirds of Canopy's income is generated through the rent they receive from the 80 properties they manage. This income is then reinvested back into the charity, supporting further volunteering and training courses, and retrofitting more houses.

Retrofit Balsall Heath and Birmingham City Council, Birmingham

Description: Retrofit Balsall Heath's whole-street retrofit demonstrator is exploring a model where funding can be better spent to support community leadership, design, oversight and contracting. As part of the integrated settlement for the West Midlands, Birmingham City Council was allocated £10.3m of local grant funds which will be used to improve homes by taking a place-based approach to maximise community engagement and uptake.

Retrofit Balsall Heath is to lead on several aspects of delivery, such as retrofit design during house archetype design, house measure specification & alternatives. Additionally, they will play an advisory role, as retrofit designer & co-client, collaborating with Birmingham City Council. To build capacity within Balsall Heath, new paid roles within the community have been proposed such as Retrofit Balsall Heath Coordinators, Community Retrofit Connectors (aka Retrofit Liaison Officers), and Volunteer Coordinators.

Outcome: Understanding the community as a co-client and partner alongside Birmingham County Council has meant that the initiative has ensured community voice, the development of trust, created efficiencies in delivery, and built local capacity. At the programme level, the initiative demonstrated that resident-led mobilisation can unlock demand at scale, overcoming barriers of mistrust and low engagement that often limit public retrofit schemes. 95% of households on the street decided to participate in the scheme, and a cabinet member from Birmingham City Council highlighted that *"this ground-up approach led to us far exceeding the number of applications that we had ever managed to achieve in previous schemes."*



Steward Partnerships and Create Reciprocal Relationships

Maintaining partnerships is as important as creating them. Strong stewardship helps partners navigate challenges and build reciprocal, long-term relationships. Establishing clear ways of working, either through a new strategy or by building on existing frameworks, can provide consistency and clarity. Partnership agreements can remain flexible while setting shared expectations around communication, involvement and collaboration.

The Local Government Association provides toolkits to support working with communities and stakeholders. Partnership agreements or frameworks can:

- **Build a shared vision and create mutual benefit amongst partners.** As well as knowing who should be in the room, to aid engagement, it is beneficial to know how the strategy can benefit each stakeholder. Stakeholder analysis should include determining the benefits to the stakeholder of being in the room.
- **Use a neutral and independent facilitator.** Intermediaries can play an important role in building and maintaining partnerships to facilitate place and area-based retrofit, usually within a neighbourhood to district level, and help power differences between stakeholders
- **Use non-adversarial contracts** to foster collaboration, transparency, and shared accountability. Contracts should align all parties around common goals such as quality, performance, and long-term outcomes.
- **Assign Clear Roles & Responsibilities.** Ensure all partners are clear on, and agree to, their responsibilities and roles.
- **Set up regular communication and encourage transparency and accessibility within decision-making** to ensure that all partners are informed and empowered to engage with the process, and influence decisions.



Levenshulme ABS, Manchester & Calderdale Retrofit Challenge, West Yorkshire

Levenshulme Area Based Scheme
In Levenshulme, South Manchester, Carbon Co-op delivered an innovative place-based retrofit programme of five homes, demonstrating a community intermediary/aggregator approach. In this model, Carbon Co-op acted as the intermediary/aggregator, sitting between householders and the project team and contractors and aggregating all the elements of the scheme including engagement, design, delivery and blended finance.

The benefit for the householders was significant, a participatory process saw them take advantage of zero interest local authority equity loans and grants as well as a quality assured package of works including external wall insulation and triple glazed windows. Carbon Co-op entered into a negotiated tender partnership with local training/ contractors B4Box, ensuring they were involved in the scheme from the start and could facilitate a multi-skilled apprenticeship for a cohort of local young people. Read more about the scheme *here*.

Calderdale Retrofit Challenge
In Calderdale, West Yorkshire, Carbon Co-op collaborated with the local authority and Todmorden Learning College to develop a new retrofit strategy to inform area based schemes. This included a Citizen Jury co-investigation into the challenges and opportunities for retrofit locally. Carbon Co-op brought in sister co-operative People Powered Retrofit to develop the Calderdale Retrofit Guide, a bottom up approach to archetypical retrofit guidance, informed by in depth, sampled surveys of properties and outlining retrofit pathways for these common housing types. Take a look at the guide *here*.

Outcomes: This selection of participatory, collaborative and community-based approaches has seen the development of tools, models and solutions to cover all aspects of place-based retrofit, including technical, financial and contractor-based elements of schemes.

2.3 BUILDING A DEEP UNDERSTANDING OF PLACE

A deep understanding of place is required to ensure that outcomes can be tailored to the needs of the place, while supporting and developing the resources of the place. Starting with this understanding will maximise opportunities to deliver effective climate resilience, public health improvements, strengthened supply chains, good jobs and robust local economies. Local lived experience, technical expertise, data interpretation and systems mapping will all be important to forming the picture of place.

TAKING A SYSTEMS VIEW

"Retrofit and its market exists in a wider context where factors from across the stack, from institutional infrastructure to community dynamics, have complex interrelationships. To develop a system-oriented understanding of retrofit and its problems, retrofit must be considered as part of an entire 'ecosystem'."
- Dark Matter Labs

OVERARCHING METHODS

These tools can be used to understand a variety of characteristics about the place, across systems

- **Locality Assessment** – within the **Local Area Retrofit Accelerator pilot (LARA)** project six themes were investigated through both data and stakeholder experience: community, financial resources, skills & training, homes, low carbon technology, governance
- **Utilising information from transitional Regional Area Strategic Plan (tRESP) Nations and Regions Context** – an integrative tool providing information on: demographics, governance and socio-economics, energy transmission and distribution infrastructure, transport and eating, industry and economy, and energy generation



East Midlands Combined County Authority, Hertfordshire County Council, Liverpool City Region & Surrey Council

Description: The Local Area Retrofit Accelerator (LARA) Pilots were commissioned by the MCS Foundation to test a systems-based, place-based model for the development and delivery of local retrofit strategies. As part of the initiative, all stakeholders within the local retrofit system are encouraged to understand homes as part of integrated systems within their neighbourhoods, municipalities, and regions. This process involved a stakeholder assessment phase to determine the local stakeholders and their drivers, and a **locality assessment** to determine the state of the retrofit system and inform co-design. This process of coming together to understand the retrofit system is fundamental to co-designing a theory of change and to identify potential interventions. **Workshops were held in a neutral space and facilitated by an independent organisation**, using methods such as **fishbowls**, **constellations**, and **future visioning**. The aim is to understand the actors, relationships and infrastructures, in addition to the physical housing stock and reviews of existing and previous programmes. By **identifying different intervention points in the retrofit and adjacent systems** – actions can be planned and targeted.

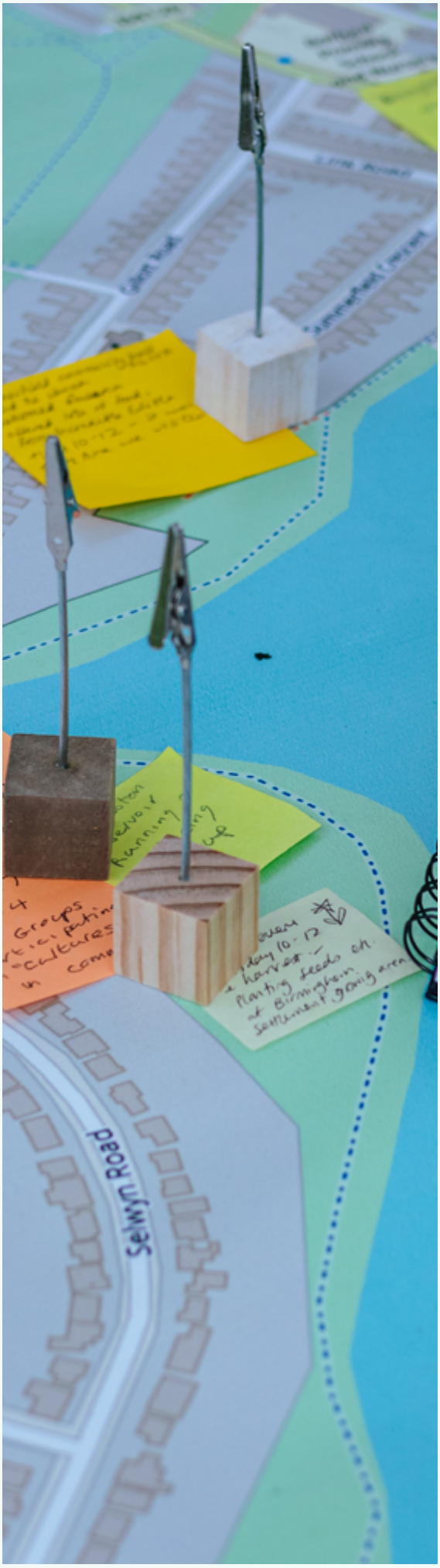
Outcomes: Among the participating groups, it was found that this process strengthened the relationships between public, private, and community organisations and improved shared understandings of the interdependencies within the local retrofit system. The whole systems approach was important to identify key interventions: *"the broad view has been that it has built legitimacy and ownership while the workshops surfaced challenges around ambition, deliverability, and the operational capacity of local partners."* During the East Midlands Combined County Authority project, the workshops led to the identification of potential for old mine shafts to provide heat. In Hertfordshire, Watford Town Council introduced a lesser-known SME level contractor into the co-design process. These examples illustrate how collaboration and knowledge sharing can unearth new possibilities.



Building a Picture of Local Needs, Resources and Systems

This will start with gathering both demographic data and local experience to develop an understanding of economic, health, housing and other needs.

- **Doughnut Economics Action Lab - Doughnut Portrait of Place** - A methodology for exploring a place across 4 lenses: local, global, social and ecological using participatory workshops, and data analysis.
- **Community Health Impact Assessment** – **CHIA Workbook**. A structured, community-led way to understand how health and wellbeing are shaped by place and by the systems people interact with every day.
- **Citizen Visioning** – **Involve UK**. Bringing together a group of local people over a series of structured meetings, typically lasting between three to six days. During these sessions, participants develop a comprehensive vision for the future of the chosen area.
- **Community Appraisal** - **Involve UK** - surveys of local need and opinion about issues such as local housing, schooling, training, employment, culture, health, social welfare and community facilities.
- **Integrated Data Mapping** – **Connected Places Catapult** - utilising health and socio-economic data



Mapping Energy Systems and Adjacent Infrastructures

Including grid capacity, local supply chains, material manufacture, and physical space for logistics.

- **Local Area Energy Plans (LAEPs)** – a methodology for translating national Net Zero targets into local energy system action, these may already exist in your place and should inform retrofit strategy.
- **Engagement with the Regional Energy Strategic Planning (RESP) process** - regional working groups for which will be set up during 2026, and utilisation of information from the tRESP Strategic Energy Need resource.
- **Engagement with the Distribution System Operator (DSO) and District Network Operator (DNO)** – to deliver local area energy planning and gather information on network connection opportunities.
- **Local Skills Improvement Plans (LSIP)** – all areas should have developed a LSIP which gives insights into local skills needs, and provides solutions to meet these needs.
- **Ecoregional Mapping** – exploring material production, flows and social patterns to understand resources that existing in the area that could contribute to retrofit delivery.
- **Utilising Ordnance Survey data and GIS** – to identify physical spaces and areas for logistics.



Understanding the Housing and Building Stock

Including housing typologies, levels of performance and maintenance, tenure and occupancy.

- **Archetyping** - a well-used and powerful tool to understand, profile or segment a building stock, to enable retrofit project planning and engagement.
- **Stock Model Analysis** - National and local datasets from a variety of sources can be used to develop a detailed understanding on the place's buildings. Specialist support may be needed to gather interpret and respond to the data, such as with Cotality's Pathways tool. Smart meter and other sensor data could also be used if this is available at the appropriate scale and coverage.
- **Understanding traditional building techniques** - in some places local and historic vernacular will be an influencing factor in retrofit strategies, for example in areas with lots of stone, timber frame, cobb or thatch.
- **Imaging at scale** - this might include thermal imaging, heat-sat and/or LIDAR.
- **Utilising Government or local data** – which might include dwelling stock, English Housing Survey, local authority or housing provider condition and occupancy surveys.



Identifying the Climatic Context

This includes exposure, temperature, overheating and flood risk.

- **Building Regulations Approved Document C** – gives information on the UK's exposure zones (diagram 12).
- **Met Office UK Regional Climates** – gives information on the temperature, sunshine, rainfall, snowfall and wind for each UK region.
- **CIBSE weather data** – can be used for more advanced modelling.
- **The Environment Agency** – provides information on flood risk, coastal change, environmental incidents and waste.

UTILISING DIFFERENT DATA SOURCES

Technical data from national, regional and local sources should be utilised. This will include from the Local Authority's own departments, NHS England, Integrated Care Boards, NESO, government databases, housing owner stock, condition and housing need assessments, and from local experts.

You may need to bring in specialist support and services to access, interpret and make plans based on relevant data. Qualitative, lived-experience, community gathered and co-design data will play an important role in shaping effective place-based strategies. Consultations, participatory days, and methods described above can all produce rich datasets, stories and insights that will shape programmes of work. Community organisations and leaders will also be important sources of local knowledge and historical data and should be identified and engaged early.



Tai Tarian Housing Association, Neath Port Talbot

Description: Tai Tarian Housing Association partnered with Swansea University to involve the voice of the local communities in their retrofit policy design. In response to the Welsh government's WHQS2023 mandate, the group recognised a need for locally tailored strategies that address socio-ecological realities, tenant trust, and climate resilience. Tai Tarian had encountered some resistance from tenants to retrofit schemes, especially where tenants felt that they didn't need new energy technology in their home, Within the last ten years, residents had undergone a programme of having new gas boilers installed. Some had expressed concerns around new technologies, such as air source heat pumps, but were more willing to engage with more familiar interventions, such as external wall insulation. Additionally, geographical differences in Tai Tarian's housing stock meant that their coastal homes required a different approach to their homes in the valleys. The diversity of the housing stock also meant that there were different histories of interventions.

Commissioning a programme of work, utilising research by Dr Chris Groves and Dr Erin Roberts, Tai Tarian and Swansea University wanted to understand the experiences of people living in Tai Tarian social housing, and how those experiences relate to their views on the packages of retrofit measures that Tai Tarian are proposing to meet WHQS2023. This included **participatory workshops, where residents drew and mapped their homes**, explaining their relationships with different parts of the house, and reflected on how the retrofit programme might affect them but also other possible future tenants with different characteristics. A community facilitator assisted in the running of the workshops to maximise residents opportunities to participate. For Tai Tarian, retrofitting starts with having a good relationship with the university – to trust them and go in front of their tenants – because they are conscious that the relationships they manage with their tenants can be really difficult.

CIVIC SQUARE, Birmingham

Description: CIVIC SQUARE'S publication, The 3ºC Neighbourhood explores future scenarios and climate predictions, and what they mean for UK urban neighbourhoods. Alongside this exploration of risk, CIVIC SQUARE have created a framework for resonding to these risks, building a holistic picture of what a regenerative approach to adaptation and resilience can look like. This includes the role that retrofit will play alongside a diverse set of factors, such as energy and financial systems, rewilding and broader infrastructures. This systems based approach to understanding place highlights the power of building a deep understanding of what is possible, in addition to understanding the current realities of our neighbourhoods and the retrofit system.

BEYOND LOCALISM

Navigating multiple overlapping systems will require bringing in multiple forms of knowledge and expertise, from a diverse range of stakeholders. Additionally, strategies should explicitly map external factors contributing to local energy vulnerability, including pressures on materials and labour supply, to ensure these are tracked and addressed rather than overlooked.

Coordinators must resist the pull of narrow localism by actively accounting for the infrastructure, services, and other systemic factors that retrofit delivery is dependent upon. Delivery frameworks must build in mechanisms to these identify and respond to wider systemic factors.



The Doughnut Economics Framework

Climate Action Leeds, Leeds

Description: Climate Action Leeds is a civic-led organisation aiming to create a zero-carbon, nature-friendly and socially just city. is a civic-led organisation aiming to create a zero-carbon, nature-friendly and socially just city. As part of this work, the group engaged with Doughnut Economics, a set of principles that encourage change that meets the needs of all people, while staying within planetary boundaries. They created a doughnut portrait of the city, exploring social and ecological lenses in the context of local aspirations and global responsibilities. Through this **mapping and visioning exercise**, Climate Action Leeds have begun to identify key interventions that could support the city planning process, and test and learn from projects across the city. In turn, the framework acts as a reference point for local aspirations and progress towards those goals.

Outcomes: The doughnut portrait of place brought clarity around who Climate Action Leeds could partner and work with, such as Leeds Community Homes. The group also identified other transition partners from the energy, housing, education and employment sectors. This included Leeds Council, pointing to how the doughnut framework could potentially inform the council's strategic work. Other opportunities identified included how to support local businesses to achieve the social and ecological aspirations identified throughout the process.



03
COMPONENTS OF A PLACE-BASED STRATEGY

This section provides an overview of the core elements that might be included to support delivery, including advice and delivery routes.

KEY COMPONENTS

This section outlines the key components that support a place-based retrofit approach. The way these are developed will depend on local context, capacity and partnerships. It provides starting points and areas to consider within a place-based retrofit strategy, including:

- The creation of delivery channels, such as retrofit advice services, area-based schemes and retrofit facilitation providers
- Involving and developing the supply chain
- Community engagement, involvement, and participation
- Coordinating place-based finance
- Creating an evaluation framework



3.1 CREATING DELIVERY CHANNELS

In a place-based strategy, different methods can be used to optimise, enable and aggregate the actual delivery of retrofit works. This might include setting up new delivery vehicles and/or working with existing businesses and supply chains. The approach should reflect the characteristics of the place and levels of local demand. This may include a mix of individual pathways for households and more coordinated approaches such as area-based schemes. Different approaches may be needed across neighbourhoods or housing types.

This could include a network of retrofit advice hubs or facilitation services – which can support able-to-pay citizens, while simultaneously focussing on Area-Based and Collective Schemes, or a One-Stop-Shop model.

UKGBC explores the different models of Retrofit Facilitation Providers (RFPs) in its report Facilitating Retrofit. Further advice on creating delivery channels can be found in the UKGBC's retrofit playbook. More information and guidance about Area-Based Schemes can be found through Carbon Coop.

A neighbourhood demonstrator might be a good starting point. This allows citizens and stakeholders to touch it, see it and feel it. The NRH has published further information and case studies of Neighbourhood Demonstrators here.



TARGETING MORE THAN THE EASY WINS

Place-based approaches should be inclusive of neighbourhoods with mixed tenure and a range of socioeconomic groups. Geographic scope may initially focus on areas of need as a way to build capacity over time. Areas may be targeted based on need, readiness and ease, such as social housing estates. At the same time, areas with more complex challenges, such as hard-to-treat housing or mixed tenure, should be considered early, even if delivery is phased over time.

RetrofitWorks, Haringey

Description: RetrofitWorks is a not-for-profit cooperative that coordinates professionals, suppliers, and community groups with a shared goal to deliver high-quality retrofit services. In Haringey, Retrofit Works is piloting a place-based ecosystem approach that aims to address the interconnected barriers preventing retrofit at scale.

Part of the model includes **the aggregation of demand into cohorts to enable operational savings** through collective purchasing. Additionally, the model is taking a longer-term iterative approach where solar is used as a familiar entry point, before introducing citizens to more comprehensive retrofit measures. To support the supply chain expand in line with increasing demand, installation revenues enable local SME training and predictable work pipelines to de-risk skills development.

RetrofitWorks are currently piloting the model through two partnership projects. The first, in conjunction with **Muswell Hill Sustainability Group**, a community energy group. The second, recently launched with Haringey Council offers additional funding to clients undertaking multiple measures to encourage a greater carbon saving, with S106 funding pots being utilised in the innovative scheme. By testing the model with various partners who have strong community relationships, participation is opened up at a hyper-local level.

Outcomes: This approach has meant that **among 56 registrations, 68% of citizens are interested in insulation upgrades, with 34% choosing more comprehensive packages** in the Muswell Hill Sustainability Group Pilot. There are 8 renewable measures secured as the project continues to progress. In the Haringey Council initiative, there are **295 completed registrations so far, with 42% seeking full (ASHP + PV + Battery + Fabric) packages, and an overall 62% seeking to go ahead with insulation**. This response is incredibly positive, and shows that the hyper-local, holistic approach to a renewables group-buy has real potential to inspire meaningful climate action through retrofit.



Oxton Community Retrofit, Scotland

Description: In early 2025, Mwclubb was commissioned by the Borders Energy Agency, with funding from Scottish Ministers to deliver a place-based assessment of housing in Oxton, a village of around 160 houses. The project focussed on a cluster of 45 timber frame homes, identified through the council's Local Heat and Energy Efficiency Strategy as heat-pump ready. Mwclubb carried out Retrofit Assessments on 8 of these homes and gathered intelligence from the community on their attitude to the energy transition as well as their long term aims for their homes, continuing to work with the Borders Energy Agency and the local District Network Operator (DNO) to further support the community and develop a holistic solution.

Outcomes: The assessment included a holistic approach which aimed to understand the potential for the installation of green energy technologies and grid infrastructure, resident thermal comfort, indoor air quality, damp and mould, overheating, flood risk, the strength of community networks and ties, availability of local contractors.

This in-depth and in-person approach, alongside a focus on healthy homes was found to increase engagement. Interest from homeowners was high and attributed to empowering residents with knowledge of their home through engagement with the building physics experts. A number of homeowners subsequently became interested in undertaking retrofit training with Mwclubb. Additionally, by taking a holistic approach Mwclubb was able to identify key relationships between grid upgrades and fabric-first retrofit:

"It is clear that grid upgrades are required in Oxton, however the levels of grid upgrades required will vary hugely depending on how heating is provided. If heat networks and energy efficient retrofit is installed, the grid demand will be far lower than if air-source heat pumps are installed without building fabric measures."


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RETROFIT ADVICE

Retrofit information and advice is crucial to all parts of an effective retrofit journey from informing and empowering residents and communities, ensuring they receive a good quality service and the right measures, to support with redress should anything go wrong.

Provision of advice will often include an overview of the process for residents, building owners and communities. This will likely include:

- Guidance on what to expect from the retrofit process
- Signposting to adequately competent and skilled parts of the supply chain, who can provide retrofit building-specific advice and delivery
- Support to understand appropriate finance and funding that is available
- Support with redress and what to expect from after-care

In Scotland, some elements of retrofit advice are provided by Home Energy Scotland. In England and Wales the Warm Homes Agency is expected to play a role in providing retrofit advice, with the exact scope to be defined. Local and expert advice plays an important role, and is needed alongside national provision, to support the delivery of high-quality retrofit that meets the needs for residents and buildings.

Places may need to create a retrofit advice service from scratch, or more likely, work with existing providers to create an integrated service. A map of existing Retrofit Advice Services is published by UWE Bristol. Retrofit advice should also be integrated into other services, or events to extend reach and engagement.

Sheffield Energy Hub, Sheffield

Description: The Sheffield Energy Hub is an example of a **Local Advice Hub** that was set up to **provide information, demonstrations, events, drop-in sessions, and material and equipment displays for householders, building awareness and engagement**. Specialists were hosted on different days to disseminate knowledge on topics such as heat pumps, renewables, and fabric improvements. Fuel poverty advice, and small emergency measures such as blankets and draught excluders were also provided to those at risk. These hubs also have the potential to provide training for local advocates to provide advice.



3.2 INVOLVING & DEVELOPING THE LOCAL

A fundamental element of a place-based retrofit strategy includes having a plan to develop the local supply chain, including skills, jobs, business support, local materials and products and access to national supply chains.

Mapping the Supply Chain

The first step for practitioners would involve mapping regional producers, suppliers, contractors, and installers – including SMEs and local procurement groups and identifying local education and apprenticeship providers. (*See 2.3 Building a Deep Understanding of Place*).

Developing the Supply Chain

Depending on local needs, capacity and the segments of the supply chain that require growth, the place-based strategy could include provision to:

- Invest in local skills development through funded / part-funded training courses and apprenticeships.
- Support existing SMEs working in the Repair and Maintenance (RMI) Sector to re- and up-skill in retrofit and heat decarbonisation.
- Provide direct labour within local authorities.
- Create Skills Delivery Partnerships, between skilled contractors, housing providers and less experienced local SMEs.
- Develop Skills Roadshows, potentially including mobile training rigs.

Involving the Supply Chain in Strategy Development

Stakeholder workshops, surveys and interviews should be used to develop a deep understanding of the challenges and barriers that local SMEs and micro businesses face in accessing the retrofit market. This may include low pay, low awareness, a lack of secure project pipelines leading to job

insecurity, or lack of time for training. Other localised factors are likely to play a role.

The NRH's report Recommendations for a National Retrofit Workforce Strategy, uncovers some potential barriers and solutions. Plans to overcome these challenges could be shaped by the insights of SMEs and other potential entrants to the workforce, through co-design and trialling. The NRH's Regional Retrofit Skills Taskforce Checklist provides a starting point for planning.

Creating Long-Term Certainty and Retrofit Pipelines

The creation of stable and long-term retrofit pipelines can help to build market-demand and grow the supply chain. Local authorities and housing associations should consider how their procurement strategies help build and empower local supply chains and SMEs, including developing skills through social value requirements. The Ashden Retrofit Futures project is looking at this opportunity in further detail.

Using Physical Spaces to Support the Supply Chain

Physical spaces, whether temporary or permanent, dedicated or shared, play an important role in delivering a place-based retrofit strategy. They can support activities such as gathering and convening, material storage, logistics and temporary accommodation.

Local needs should be assessed based on demographics, available space within the built environment, and emerging delivery plans. These can then be mapped against existing provision to identify gaps and opportunities.

Consider how different spaces and buildings can be used for:

- Material depots
- Site offices
- Factories (if off-site / industrialised retrofit or new manufacturing is planned)
- Education facilities and community centres

Practitioners should also consider if and how each of these spaces could act as catalysts for other needs within their plan, such as building engagement, convening in-person, or conducting training.

Community Wealth Building & Local Procurement

The Centre for Local Economic Strategies (CLES), highlights the opportunities and positive impacts of local procurement and community wealth building principles. This includes the circulation of wealth within local communities, rather than being extracted by external businesses or investors. In 2025, CLES created a guide for maximising public value through procurement.

Wessex Community Assets & The Bioregional Learning Centre, Dorset & Devon

Description: Across the UK, local retrofit supply chains are often underdeveloped due to inconsistency in national funding. Global supply chains are also increasingly vulnerable to disruption associated with climate change and geopolitical volatility. To address these sorts of issues, Wessex Community Assets (WCA) has been working with partners such as Assemble Studio and The Bioregional Learning Centre to explore the benefits of regenerative retrofit supply chains – economically, socially, and ecologically.

Low-Carbon Insulation Materials in West Dorset. For example, building upon a history of flax cultivation in West Dorset, WCA is supporting local farmers to diversify into flax production - a crop which provides opportunities to sequester carbon and promote soil health. WCA is developing a bioregional hub that enables producers to process flax collectively, removing the need for costly individual investment in processing infrastructure. This locally grown flax is now being explored as a low-carbon insulation material for retrofitting homes in the surrounding area.

Bioregional Hubs. WCA is working with partners to develop a network of **bioregional hubs**. These have the aim of **storing and supplying materials, allowing local businesses to use workshop, processing, and fabrication facilities, hosting community events, and providing opportunities for training**. By **creating local partnerships between SMEs, contractors, producers and manufacturers**, the hubs create the civic infrastructure for supply chains to flourish. Having mapped the region's histories, current and potential agricultural and material production, the hubs are also designed in response to the local area and context. This ecology of practice signifies an inspiring opportunity to create the physical and social infrastructure for regenerative supply chain development in the retrofit system.

WCA and the Bioregional Learning Centre are developing practical guidance on creating bioregional networks and community-owned infrastructure. You can stay updated *here* and find out more about the flax project *here*.

Treneere Estate Project, Penzance

Description: Treneere Estate is a mixed tenure estate, which is home to communities who have faced many challenges and economic barriers. With over 300 homes in need of retrofit, the Treneere Estate Project was an area-based scheme which delivered retrofit works and improvements to over 300 homes through the South West Procurement Alliance's (SWPA) Whole House Refurbishment & Associated Works (WH2) Framework. SWPA partnered with the housing association, LiveWest; contractors, Westcountry Maintenance Services (WMS); local residents and community groups. To deliver social value and provide opportunities to develop the supply chain, the programme included activities such as **interviews with local residents with the aim of recruiting people from the local community**. Equal opportunities for suppliers of all sizes to perform works and services that match their suitability were provided and a local business, WMS, based in the Southwest was appointed, **employing local labour through an established supply chain**. The **contractor was also involved at an early stage** to co-design solutions.

Outcomes: As a result of these efforts, it was found that collaborative planning and co-design with local SMEs and residents provided more opportunities to deliver a diverse set of outcomes. Some of these co-benefits included opportunities to build skills, community wealth building, long-term collaboration, and trust. As a result of the interviews, WMS employed a local individual who continued by enrolling for an apprenticeship at Cornwall College, enabling her to qualify for an NVQ. The approach allowed for the housing association, LiveWest to procure works with WMS, a SME who employ local labour and hold a deep understanding of the region's needs. Maintaining positive relationships between local residents, housing associations, contractors, and suppliers fostered longer-term collaboration and trust. Transparent procurement improved trust and delivery performance. This approach has created opportunities for SMEs to participate in this framework and secure suitable projects while ensuring fair and transparent competition.



3.3 COMMUNITY PARTICIPATION & INVOLVEMENT

Place-based approaches should aim to put residents and communities at the heart of decision-making, building buy-in and raising literacy. Practitioners should ensure that the outputs of these activities lead to equitable and co-designed strategies and targeted outcomes.

Over the last decade, approaches which have been reliant on the market and top-down decision-making have proven ineffective. This is due to their vulnerability to consumer demand, and patchwork policy and funding landscapes which have been confusing for residents to navigate. Part of the work of a place-based retrofit strategy will be to demystify retrofit, and allow citizens to touch, see and feel the process and its benefits. Further case studies of community-led retrofit can be found in the NRH Street Demonstrators Profiles.



CIVIC SQUARE, Birmingham

Description: CIVIC SQUARE held an open house over a period of a week to encourage citizens to engage with retrofit. Retrofit House will be used for workshops and discussions about neighbourhood transformation, aimed building confidence about the methods and skills needed among the local community. The house is not only open to homeowners, but to members of the community such as SMEs looking to diversify their skills, and learn more about regenerative practice. Retrofit House demonstrates an ambitious approaches to retrofit on a Victorian terraced street, and explore what it means to have a common house, and third space on a street. You can find out more here.



Dudley Council, West Midlands

Description: Dudley Council sought to generate excitement and interest among residents, for them to feel empowered and engaged in retrofit, and to understand the benefits that it could provide to them. The council took an inclusive approach, creating an offer for all residents and tenure types. To develop this, the council organised a longer-term build-up process to engage citizens over time by gradually introducing retrofit related concepts and potential co-benefits. This included using a people-centred approach, and taking unconventional routes to generate buy-in. For example, **the council used the improvement of a local green space which was underused to create food growing initiatives and hold community events**.

Outcomes: Gradually, turnout at these events has increased and created a space where citizens can talk about their homes and connect with those who can provide advice. As part of the Net Zero neighbourhoods' scheme, **the council targeted about 120 homes and had an opt-in rate of 50%**.

METHODS DIRECTORY

Social Infrastructure

Social infrastructure should be identified (as part of Understanding Place) and utilised as the foundation for engagement

- **Anchor Organisations** - engagement might be through anchor organisations and public infrastructure such as GPs, schools and public buildings, and social clubs.
- **Third Spaces** – neutral, accessible and often informal social spaces, distinct from the home and work, third spaces include libraries, community halls, pubs, cafes, sports clubs, parks and places of worship. These spaces can be useful sites for engagement and convening, providing a levelling neutral ground to encourage conversation and collective working.
- **Physical spaces** – places used for developing and mobilising the supply chain may also play a role in citizen engagement. They could be places of learning, experience or trust-building.

Social Marketing

To build trust, awareness, excitement and connections.

- **Sharing Stories** - encouraging neighbours or groups to share stories and experiences and engaging through social and sports clubs. Good examples include Birmingham Green Doors, British Gas Sports Partnerships, and Retrofit House.
- **Local advocates and community champions** - empowered and resourced to speak about retrofit and build trust, like WeCanMake's community advisor.
- **Communication** - via letters, flyers, postcards, newspapers and social media. This could be either led by community groups or Local Authorities depending on the outcomes targeted. Civic Square have a 'Retrofit Street Zine', and Believe Housing use postcards, rather than formal-looking letters, to communicate on retrofit and maintenance work.

Community data gathering and co-design

Community activities and co-design help residents get hands-on, better understand their buildings and spaces, and shape programmes that meet their needs, building long-term buy-in and trust.

- **Community data-gathering** - could include thermal imaging events, or street level purchase of monitoring equipment. These help residents understand how and why their homes are performing, and make the case for change.
- **Co-Design** – treating community members as equal participants in the decision-making process, alongside other stakeholders and experts. Demonstrated in the following case study from WeCanMake, with guidance available from Sunlight Foundation, Mind and Co-designing Space.
- 3Ci have published a Co-Design guide, found here.

Collective & Communal Works

Collective and communal works help build momentum and connections delivering meaningful outcomes from the start of longer-term programmes. These works can also start to establish new local supply chains, good jobs and local economic growth.

- **Collective organising activities** - starting with adjacent collective organising activities, like community composting, sharing libraries, repair clubs, and gutter doctors to build trust, awareness and engagement.
- **Trade Schools** – community and civic-led trade schools can provide access to skills and knowledge to enable local people to participate in the upgrade of homes. Examples include Neighbourhood Trade School, Re:Builders and Soltherm's work with Building Heroes.

CULTURAL IDENTITY & INCLUSION

Certain groups, such as racialised, marginalised, and disabled people, have been under-represented or under-involved in political, environmental and societal decision-making. Place-based retrofit provides an opportunity to build social cohesion and solidarity.

Retrofit initiatives should understand, consider, include and respond to the cultural identities within their place, always asking who might be excluded and should be invited in. Opportunities to partner with charities such as National Energy Foundation, who have an excellent track record engaging and working with marginalised, low income and vulnerable householders, should be explored.



Eastside Community Trust, Bristol

Description: Bristol's Energy Champions programme is a partnership between local community anchor organisations such as Eastside Community Trust, and Bristol Energy Network. The programme involved training 'resident energy champions' on the basics of retrofit and their homes. Collaboration between the organisations has been important, with Eastside bringing local connections and cultural insights into how best to communicate knowledge with local audiences, and Bristol Energy Network providing the technical information. Across Bristol 100s of energy champions have been trained. It was also found that not everyone was accessing printed written material, even when translated, so Eastside made a *series of short videos* demonstrating DIY draught proofing and energy saving techniques in English, Punjabi and Somali.

Outcomes: Amongst the 20 energy champions trained, as part of the Eastside Community Trust cohort, 16 languages were spoken, ensuring that the diverse community was represented, and that future engagement by the energy champions could meet local needs. Participants were invited to attend workshops on home energy improvements, damp and mould, and DIY skills.

WeCanMake, Bristol

Description: WeCanMake is a community land trust and neighbourhood test-space in Bristol, imagining and making new ways to create homes that build social infrastructure and community wealth. As part of the Retrofit Street project, residents were engaged through **door knocking, participation events, one-to-one sit downs**. Options were available to opt-in phase by phase, or for specific events only. **'Participation agreements'** were used between the community members and the project team to agree collective decision making and exploration. **Childcare, lifts and social activities were also provided** alongside workshops and events to alleviate barriers to participation. **Monthly meet ups** were also held to continue knowledge sharing, discuss progress and continue community building and momentum.

Informal thermal imaging sessions with the community and briefings on monitoring equipment helped build knowledge and trust. A **'Dream Fund'** was made available for small, shared pieces of infrastructure, like shared children's bikes, to ensure everyone benefited and results were made tangible from the start. We Can Make and Bath University conducted sensor-based monitoring, and a social scientist from the University of Exeter conducted interviews to understand the homes and the occupant needs. Interviews explored how people felt in each room of their home, they also explained the data gathered, through the sensors, to the occupants, and what this might mean.

Common issues were identified with the housing archetype, the un-insulated dropped eaves creating a cold bridge and causing internal damp and mould, and failed cavity wall insulation. At workshops **technical insights were brought together with participatory decision making and design processes including card games, floor plan mock-ups using models, live-prototyping**, exploring biomaterials through samples, and quadratic voting.



3.4 COORDINATING PLACE-BASED FINANCE

Funding and finance are likely to be important drivers within a place-based strategy, which should create the conditions to enable and engage with different finance streams. Financial solutions should be designed to meet the needs, and work with the resources, of a place.

Many places are already engaging with blended funding streams, to bring together different types of funding to create a larger pot to deliver more ambitious projects with multiple outcomes. It is likely a place-based finance strategy will combine methods including grassroots and community finance, place-based or bioregional finance, and national finance.



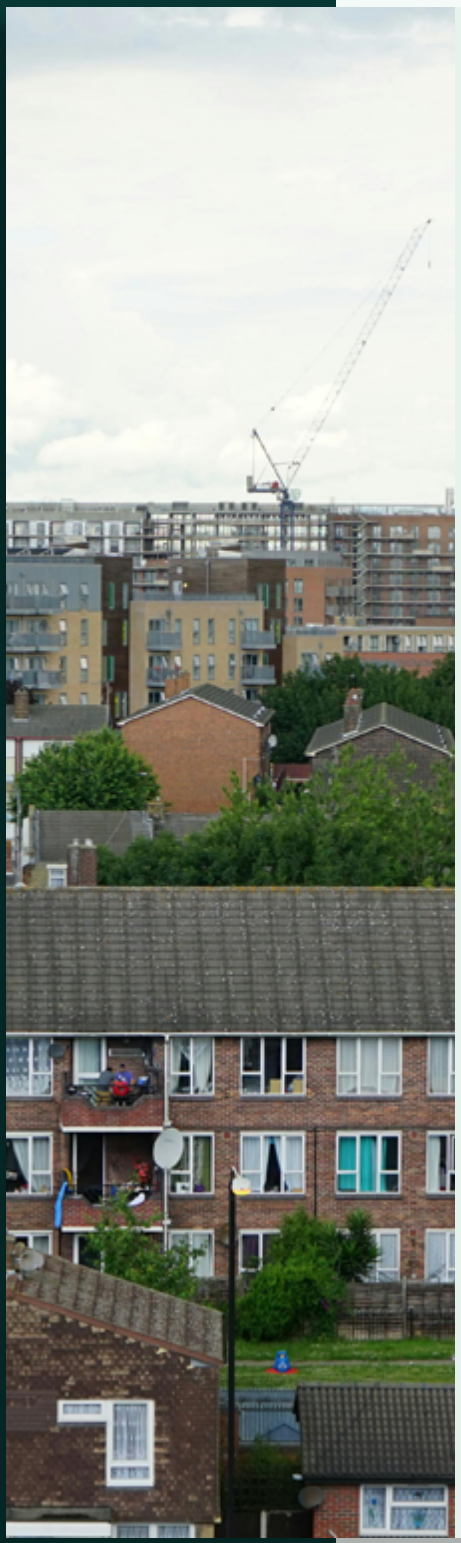
NAVIGATING DIFFERENT FUNDING OPTIONS

	Fund Type	*More Information*
Grassroots & Small Funds	Community share raising	Information from Community Energy England
	Community solar	Information from Community Energy England
	Aggregated and collective schemes	
Place-Level & Medium Funds	Carbon Offsets	For example, HACT retrofit credits
	Local authority backed loans	For example, through Lendology
	Bioregional Finance	See Dark Matter Labs, and the BioFi project.
	Net Zero Neighbourhoods Blended Finance	Information from 3ci, examples in West Midlands Combined Authority and London
	Place-Based Impact Investing	For example, with The Good Economy
	Local authority revolving loans	See the UKGBC's report
National & Large Funds	Social Housing Retrofit Loans	Through the National Wealth Fund and Barclays
	Pride in Place Funding	Pride in Place Strategy
	Warm Homes: Local Grant	Guidance for Local Authorities
	Credit Unions	Carbon Coop's experience
	Warm Homes: Social Housing Fund	Further details expected as part of Warm Homes Plan developments-
	Local Power Plan, including emergence and development grants, construction and operation	Submit interest here

Funding streams not currently available, at the time of publication, but in development include:

- Warm Homes consumer low / zero interest loans - Warm Homes Plan
- Warm Homes Fund - Warm Homes Plan
- Heat-as-a-service - Information from the Net-Zero Infrastructure Industry Coalition
- Property linked finance

A public community partnership model could enable public bodies and community-owned housing to pool resources and retain value locally. Revenue from co-operative housing, such as rents, could be reinvested into energy efficiency and retrofit upgrades, creating a funding model that supports a longer-term approach. See the Canopy Housing case study in section 02 Stakeholders, Roles & Responsibilities to see how this has played out in practice.



London Councils, London

Description: London Councils brings together London's 32 boroughs and the City of London Corporation. Through the **London Net Zero Neighbourhoods Programme**, developed alongside Living Places and 3Ci, the organisation has developed an approach to integrate funding mechanisms to create long-term financial sustainability and scalability for area-based retrofit. The blended finance approach involves a range of private and public funds. The proposed finance facility includes a fund that can deploy revenue for project development, addressing long-standing challenges in previous stop-start retrofit funding schemes. Over five years, the London Net Zero Neighbourhood (NZN) Programme is predicted to deliver over 20,000 retrofitted properties and £400m in private finance.

Outcomes: This approach offers zero upfront cost to households by funding measures through a combination of existing grant funds and repayable finance, repaid over time primarily by the savings from energy bills. It aims to provide a retrofit offer across tenures and drive equitable outcomes for residents most in need, including reducing fuel bills.

Wolfhagen, Germany

Description: The coordination of place-based finance for retrofit is being explored through community–public partnerships. In Wolfhagen Germany, a municipally linked energy company partnered with a citizen-led cooperative to co-own and govern local energy infrastructure. Residents were able to buy shares in the cooperative, with surplus revenue directed into a fund for the residents. This fund is overseen by a multi-stakeholder board including cooperative members, the municipality, and energy experts, and was used to support local energy efficiency measures. While initially focused on smaller-scale interventions, such as subsidies for efficient appliances and heating controls, the model demonstrates how locally generated revenue can be collectively governed and reinvested. As explored in a report by In Abundance, this reflects a broader approach where public bodies collaborate with communities to design, finance, and steward shared infrastructure.

Outcomes: The project could lead a replicable model for coordinating place-based finance that aligns energy provision with long-term regenerative retrofit goals. By embedding civic ownership and governance into the system, financial flows are retained within the community and redirected toward improving housing stock over time. Unlike private energy models, where the pursuit of profit can disincentivise demand reduction, the Wolfhagen approach enables surplus to support energy efficiency upgrades. Although the scale of retrofit investment in Wolfhagen remains incremental, the case illustrates how local authorities and communities can build financial ecosystems that grow over time: aggregating revenue, strengthening institutional capacity, and creating a sustained pathway for retrofit through common ownership and coordinated local finance.

The Local Power Plan

The Local Power Plan also includes opportunities for local authorities to co-own energy infrastructure with local communities, highlighting a key opportunity for public-commons partnerships in the energy sector to build in funding opportunities for retrofit and energy efficiency.

3.5 CREATING AN EVALUATION FRAMEWORK

You should consider how to evaluate the health of your strategy relate to the **operational activities and outputs of a place-based strategy**, in addition to the **outcomes and impacts** of place-based retrofit itself. The following outcomes, identified through engagement with our network, reflect what community groups, government actors and retrofit industry representatives would like to achieve through a place-based approach.

OPERATIONAL OUTCOMES

01. THE CREATION OF PARTNERSHIPS

- *Representing a departure from siloed and top-down control*
- *Enabling stakeholders such as citizens, community groups, supply chains and local authorities to work collaboratively together*

02. MEANINGFUL COMMUNITY INVOLVEMENT

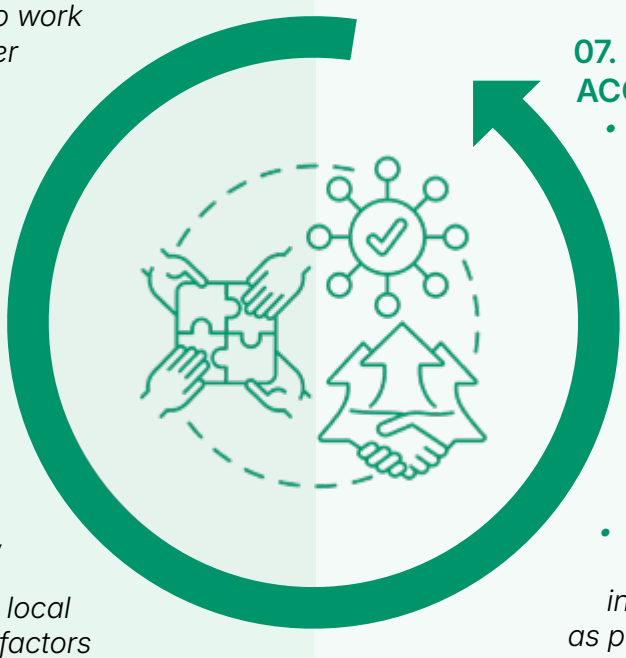
- *Involving communities, inclusive of citizens, organisations, and the supply chain*

03. DEEP UNDERSTANDING OF PLACE

- *Tailoring retrofit to place specific needs, buildings, and resources*
- *Identifying links between local issues and wider causal factors*

04. EFFECTIVE TECHNICAL AND RELATIONAL ENABLERS

- *The technical, relational and economic enabling infrastructure which support the delivery of well-resourced, high-quality retrofit are strengthened.*
- *Infrastructures are designed and stewarded with reciprocity in mind - supporting rather than straining the retrofit system.*



IMPACT & OUTCOMES

08. LONG-TERM MOMENTUM, CONFIDENCE AND STEWARDSHIP

- *Moving beyond boom and bust cycles*
- *Building in circularity, care and repair*
- *Allowing partnerships to flourish*

07. FAIR AND EQUITABLE ACCESS TO BENEFITS

- *Equitable inclusion of different tenures, socioeconomic groups, people and places*
- *Distribution of co-benefits more widely*

06. BENEFITS WHICH INCLUDE AND GO BEYOND ENERGY EFFICIENCY*

- *Warm, healthy, resilient homes and buildings, including wider benefits such as public health and community resilience*

05. STRONG SUPPLY CHAINS, RESOURCES AND SKILLS

- *Enabling the delivery of tailored, high-quality retrofit*
- *Secure workflows for local contractors and SMEs*
- *Localised skills, materials and resources embedded within retrofit programmes*



Following the NRH's State of the Nation Review, the NRH has explored how broader outcome measurement can accelerate retrofit delivery and be designed to drive better policy, funding, and delivery decisions. You can learn more about this work by visiting the Monitoring Outcomes & Impact Evaluation (MO+IE) project page, linked here.

INVOLVING CITIZENS IN EVALUATION & COMMUNITY HEALTH IMPACT ASSESSMENTS

Community Health Impact Assessments were referred in section 2.3, 'Building a Deep Understanding of Place,' and can also play an important role in evaluation. Centric Lab has co-developed a programme alongside grassroots organisations, to help community groups explore factors that drive health outcomes, the systems that underpin them, and the documents and practices that are applied.

> *"Community Health Impact Assessments, or CHIAs, provide a structured, community-led way to understand how health and wellbeing are shaped by place and by the systems people interact with every day. A CHIA enables communities to define what health means in their own context and to assess how a proposed or existing intervention, such as a retrofit strategy or project, may affect health outcomes. It brings together lived experience, local knowledge, and evidence to surface the social, commercial, and political determinants of health that are often missed by standard datasets or top-down approaches."*

A more in-depth exploration and workbook can be found *here*, developed by the NRH and Centric Lab. Further case studies about evaluating the co-benefits of retrofit can be found within the Measuring Outcomes and Impact Evaluation Innovator Profiles.

SETTING TARGETS COLLECTIVELY

Evaluating the success of place-based work might include using participatory methods, such as CHIA's, to identify the specific outcomes which might be measured as part of your place-based retrofit programme. This approach will allow you to adapt your monitoring and evaluation approach to the place, rather than fitting outcomes into predefined metrics which may not necessarily reflect your goals.

Evaluation should be understood as more than a linear journey, or something that only occurs at the end of the project. Setting aims alongside cross-sector stakeholders, place-based groups and residents should be integrated from the beginning of the journey and revisited as the programme develops. As explored in section 2, you might also partner with other stakeholders who can provide data associated with public health, or deprivation for example.

ALIGNING MONITORING & EVALUATION WITH OTHER REPORTING RESPONSIBILITIES

While details on the monitoring and evaluation plans for The Warm Homes Plan are not yet available, there is an opportunity to align place-based retrofit strategies with reporting requirements included in the Pride in Place Strategy. Where neighbourhoods and places are in receipt of funding from the Pride in Place Impact Fund, local authorities are required to report on their neighbourhood governance boards, project plans, delivery, and outcomes.

Official guidance can be found here. Many of these include suggested metrics relate to place-based retrofit. This includes the recording the creation of jobs, and number of green retrofits including residential units. You might consider how reporting on the Pride in Place Strategy can be integrated into your place-based retrofit evaluation framework.



Leeds Council, Leeds

Description: Build Upon, developed by the UK Green Building Council (UKGBC) and Leeds Sustainability Institute, is a framework designed to assist Local Authorities to measure and understand the impacts of retrofit interventions. In Leeds, the city council has delivered energy efficiency improvements to housing for many years, previously offering cavity wall and loft refurbishments. In the past eight to ten years, the Council has been focussing on external wall insulation, targeting its own council housing stock as a catalyst for renovation work which can then be extended to other types of housing in the same area, paid for with a mixture of external funding and means-tested owner contributions. However, the council needed to create a better evidence base to build their business case and attract additional funding. Using the Build Upon 2 Framework, the council wanted to track the impact of retrofit on fuel bills and fuel poverty, as well as other health, social and economic benefits.

Outcomes: Understanding and systematically measuring retrofit outcomes can inform decision-making across a wide range of policy areas, including climate strategy, energy infrastructure investment, public health planning, and efforts to address fuel poverty. Beyond the immediate scope of individual retrofit projects, data collected through BUILD UPON2 Framework indicators can feed into broader strategic work. In Leeds, for instance, this approach is being applied in collaboration with Parity Projects, supported by the Department for Business, Energy and Industrial Strategy (BEIS). The partnership has developed a tool that uses EPC data at a city or neighbourhood scale to model different pathways towards emissions reduction targets, this analysis is shaping the council's its Low Carbon Housing Strategy, as part of its wider ambition to become a carbon-neutral city by 2030.

USING THE EXAMPLE FRAMEWORK

Evaluation should be considered early when developing a place-based retrofit strategy, with clear outcomes and indicators agreed from the outset. These can then be reviewed over time to understand progress, adapt delivery and demonstrate impact.

A balanced approach includes both quantitative and qualitative measures. Quantitative data helps track activity and scale, while qualitative insights provide understanding of experience, behaviour change and outcomes that are harder to measure.

The questions below are intended as prompts and can be adapted to reflect local priorities, available data and capacity.

EVALUATING OPERATIONAL OUTCOMES

Description

01. The Creation of Partnerships

There is an increase in the quantity and depth of partnerships. These partnerships span different sectors, bridge decision-makers and grassroots actors, and create support for local delivery actors within a nested scale of enabling infrastructure. This allows multi-disciplinary collaboration, and decisions to be made at the most local or appropriate scale.

02. Meaningful Community Involvement

Communities are involved in a way which results in genuine influence. Grassroots participation in retrofit strategies can be traced to meaningful outcomes. Beyond residents and community groups, local businesses and SMEs are also involved in strategy co-design processes.



Example Questions & Evaluation Questions

- How many stakeholders are involved as partners?
- How many of these partnerships bridge actors across different sectors, levels of authority, and scales?
- Did the balance between top-down and bottom up feel right?
- How inclusive and representative were partnerships among stakeholders within the retrofit system?

- How often have communities been engaged, including residents, community groups, and local businesses?
- What types of activities have communities been involved in?
- What outcomes have resulted from community involvement?
- How do communities feel about the place-based retrofit process, post works and engagement?

03. Deep Understanding of Place

A deep and holistic understanding of place has been developed, resulting in tailored advice, design, and delivery. This understanding blends lived experience and technical expertise.

04. Strengthened Technical & Relational Enablers

Enabling infrastructures such as the provision of education and training, advice services, accessible finance, civic spaces and decision-making channels, lead to strengthened supply chains and the delivery of high-quality retrofit.

EVALUATING IMPACTS & OUTCOMES

Description

05. Strong Supply Chains, Resources and Skills

Supply chains are flourishing and lead to secure jobs. Place-based retrofit skills are developed, leading to high-quality works which are tailored to local archetypes and building stock. Regional supply chains are socially, economically and ecologically regenerative. They integrate local contractors and SMEs, material producers and manufacturers, using community wealth building principles.

- What types of knowledge have been incorporated?
- Has a diversity of knowledge sources from the community, and technical sources been used?
- How many partners have been involved in contributing to and building a picture of the place?
- To what extent have the community been involved in developing an understanding of the unique characteristics, opportunities and challenges associated with the place?
- How well do you understand the housing stock, and has the data been analysed for usefulness and accuracy?
- Have been able to develop an understanding of the system and identify interventions based on this?

- How many residents are using advice services?
- Have resident's attitudes towards retrofit changed?
- How many individuals have received training? Has the local supply chain grown?
- Do partners feel a sense of ownership over the strategy, and feel able to take next steps?

Example Questions & Evaluation Questions

- The UKGBC provide metrics which indicate supply chain health in their report, 'Facilitating Retrofit: A comprehensive sectoral analysis.'
- Have procurement teams had positive responses to retrofit tenders, from local contractors for example?
- Do citizens feel able to trust the quality of works provided by local contractors and retrofit services?
- How many local retrofit courses or apprenticeships are available, and what are their uptake and completion rates?

06. Benefits Which Include and Go Beyond Energy Efficiency

In addition to improvements in energy efficiency and emissions reductions, the benefits of retrofit are tailored to the specific needs of the place. This might include improvements in comfort, public health, climate resilience, and local economies.

07. Fair & Equitable Access to, and Distribution of Benefits

A deep and holistic understanding of place has been developed, resulting in tailored advice, design, and delivery. This understanding blends lived experience and technical expertise.

08. Long-term momentum, confidence, and stewardship

Partnerships are enabled to flourish long-term and retrofit supply chains can develop without disruption. Resilience has been built into the retrofit supply chain, enabling it to withstand shocks or changes in policy and the market. Citizens feel able to trust retrofit professionals, and a culture of care and repair is built into our society.

- See the Community Health Impact Assessment workbook.
- The Edinburgh Climate Change Institutes's Co-Bens project has developed evaluation methodologies which can account for intersections between climate action, economic, environmental, and social impacts. Their co-benefits atlas can be found here.
- Have future climate scenarios, including flood risk and overheating been integrated into retrofit design?
- Are interventions responsive to local housing archetypes, addressing common issues that lead to issues such as mould and damp?
- Can improvements in health outcomes associated with cold, damp, mould, and heat exposure be recorded?

- How many cross-tenure area-based schemes have been facilitated?
- Have groups from different socioeconomic and minority backgrounds been reached or involved proportionally?
- What safeguards exist to prevent unintended negative outcomes such as displacement associated with 'gentrification' following the improvement of neighbourhoods?
- If building upon the Doughnut Portrait of Place, has the place, or neighbourhood made progress towards reaching the social foundation within planetary boundaries?
- Are relationships with other places built upon principles of reciprocity and mutual exchange, rather than unequal exchange or over-extraction?
- Is there a plan to address negative social and environmental issues within broader supply chains?

- Do local businesses feel confident in the supply of retrofit work to continue developing their retrofit skills, and hiring or training additional workers?
- Are partnerships durable, and are there processes to steward and manage relationships between stakeholders?
- Are citizens aware of, and empowered to confidently engage with retrofit?
- Are there increased opportunities to attract investment and funding for retrofit?



NATIONAL RETROFIT HUB

UK GBC

EDRC Energy Demand Research Centre