

# **Warm and Safe Homes in Fishwick**

## **Community engagement guide of best practice**



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Prepared by National Energy Action

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# Contents

Contents.....	1
Executive summary .....	2
Introduction .....	6
The workshops.....	6
Resident Insight.....	7
Door knocking:.....	7
Phone calls: .....	7
Letters: .....	8
Managing expectations .....	9
Prior to the work being carried out .....	9
Importance of face-to-face contact .....	9
Impact of COVID-19.....	9
While the work was being carried out.....	10
Keeping households informed .....	10
Accessibility & points of contact.....	11
Minimising disruptions to everyday life .....	11
Following the completion of the works.....	12
Post-work visits .....	12
Support with using new technology and managing air quality at home.....	12
Warranties.....	13
Looking ahead.....	13
Recommendations .....	14
Planning and communication .....	14
Community engagement.....	14
Managing relationships while work is carried out.....	15
Aftercare.....	15

## Executive summary

The Warm and Safe Homes in Fishwick (WASH Fishwick) project placed a strong emphasis on working closely with the community. With this mind, in June 2024, three community workshops were held with residents supported by WASH Fishwick to gather their experiences throughout the project delivery period. Twenty residents attended and shared feedback on their engagement with National Energy Action (NEA) and Seddon, and their experiences at different stages of the project journey.

Residents appreciated many aspects of the how the project was designed and delivered but also identified areas for improvement. Their feedback highlighted key themes across four stages of the project:

### **Initial contact:**

Previous experiences with the organisations involved in the earlier failed works in 2013 meant residents were wary of particular forms of communication. Residents were cautious of door-knocking and other unannounced outreach. Tailored communication in a range of formats, like advance letters for elderly residents and emails for working families, was crucial in building trust and ensuring information reached everyone in the community in a way that worked for them. Later, communication delivered through in-community events was also valued.

### **Pre-works:**

Residents reported that the number of property and/or household surveys completed by Aldrock, Seddon and National Energy Action increased the trust in the quality of work. Having regular home visits and calls increased confidence and perceptions that the project was legitimate and could be trusted.

However, delays to the works starting — exacerbated by the Covid-19 pandemic — caused frustration. Residents suggested providing written records of agreed-upon work to manage expectations and maintain clarity during such times of uncertainty.

### **During works:**

Residents had a lot of positive feedback for the communication during the time the works were being carried out. Contractors were described as accommodating and approachable, with households appreciating being kept up to date. One resident, for example, liked knowing exactly when scaffolding was being removed so they could inspect for damages, making them feel involved and listened to.

However, for some, missed appointments and challenges with clearing up equipment following the completion of works highlighted the need for improved scheduling and follow-up processes. The Community and Resident Liaison Officer (RLO) played an essential role in resolving issues quickly and efficiently. Most residents reported that the RLO was essential as they acted as a gateway between Seddon and householders. Any issues could be reported to the RLO via WhatsApp, over the phone, or by popping into the local community centre. The RLO also helped to co-ordinate works between the contractors and householders and established strong bonds of trust with residents.

### **Post-works:**

Follow-up visits were highly valued by residents, as was the 12-month defect detection period but suggested additional resources, like guides on managing ventilation or damp, would have been useful to support their daily practices moving forward. Also recommended was a clear point of contact for long-term support, such as a checklist with relevant contact details.

Overall, residents were happy with the level of communication and community engagement over the course of the project. Feedback from the project team highlighted the positives of the approach to communication, alongside challenges, and discussed the lessons learned between the phases, factoring them into future delivery as far as possible. Feedback from the community and delivery teams also shows where the approach to engagement can be fine-tuned for future projects, and a series of recommendations can be found below and in the final section of this document.

### **Recommendations**

The following recommendations are suggested for future similar projects:

#### **Planning and communication**

- As far as is possible, clearly defining the project scope and objectives before communicating the project to residents is important in building trust and managing expectations.
- Early phase work should look to engage whole families and support networks to ensure that householders do not miss out on support, especially in cases where the householder may be older, require additional care, or not speak English as their first language.

#### **Community engagement**

- Allow time for trust to develop within a community, especially where households have had negative experiences in the past.

- Prioritise relationship building and establishing trust in the community during the early stages of the project. This may include buy-in from a trusted name, for example, the local MP or community leader.
- Communication should be tailored to householders' needs, considering vulnerabilities and ensuring information reaches people in a format that they are comfortable with. This should also account for language barriers and translation where required, including having such skills among team personnel.
- Future projects should consider embedding a local Community and Resident Liaison Officer very early in the project. The role of the RLO was critical to the success of WASH Fishwick project. They should be a local, visible face that is easily contacted, spoken to face-to-face and who can facilitate and/or provide translation or other address other accessibility issues. The trust developed with the RLO also enables an effective liaison-point and support for communication between householders, programme managers and contractors.

### **Managing relationships while work is carried out**

- Provide a written record of works that will be carried out through follow-up emails to discussions and what is going to happen would help to avoid disappointment at later stages and manage expectations.
- Ensure contractor/builders are visible, accessible and approachable in the community, through having offices or a presence in the local community (e.g. community centre).
- Tailor building works to the support needs of residents, e.g. checking if vulnerable residents wanted to be present at home during the works, if they wanted a family member or friend present or fitting work in around the routines of young families.
- Establish good communication between contractors/builders and householders to ensure prompt arrival and appointment keeping. Pre-contact with the householder if they are unable to attend the appointment is important, particularly with consideration for those who work and have caring responsibilities.

### **Aftercare**

- Ensure documentation is available in a range of formats, including preferred language or paper and/or digital copies, to suit the householder preference.
- Allowing a 12-month 'snagging' and follow-up window before completing the final sign-off meeting is important to allow households to communicate and have any issues in their home addressed.

- Work with residents on how to manage ventilation and damp within their homes, recognising the links between the physical changes to the house and how residents live in their homes.
- Provide residents with a guidance package that outlines the warranties and guarantees for the works, with detailed information on where to access help if anything goes wrong, and how to claim against any relevant warranties or guarantees in that event.
- The RLO should conduct a comprehensive "stress test" of the warranty claim process to identify potential obstacles and ensure its effectiveness. To support householders, the guidance package should include clear, step-by-step instructions, making the process accessible and straightforward.

# Introduction

The Warm and Safe Homes in Fishwick (WASH Fishwick) project placed a strong emphasis on working closely with the community. Findings from early interviews with residents showed a mostly negative experience during the earlier failed works carried out in 2013, with residents reporting not feeling listened to, and abandoned when earlier works went wrong.

With this mind, in June 2024, three community workshops were held with residents supported by the WASH Fishwick project to gather their experiences to gather their experiences throughout the project delivery period. Twenty residents attended and shared feedback on their engagement with National Energy Action (NEA) and Seddon, and their experiences at different stages of the project journey.

This report explores how the team engaged with residents, overcame challenges and built trust through two distinct phases of the project. It also includes valuable feedback from residents on how communication and engagement could improve in future projects. It begins by outlining the workshop structure and data collection methods before presenting key findings, organised by the different stages of the customer journey. It concludes with recommendations for similar projects.

## The workshops

Three community workshops were held over two days at the Preston Community Hub in Fishwick. Designed to be interactive, these sessions encouraged residents to share their personal experiences and reflect on how engagement strategies might work for other household types.

The workshops were structured around a timeline drawn on paper, with the key points of the project journey marked at intervals. These included:

- The initial contact between National Energy Action and residents
- Prior to the works starting
- While the work was being carried out
- Following the completion of the works

Facilitated by National Energy Action's Research Team, the workshops were informal discussions where feedback was recorded on sticky notes and placed at relevant points on the timeline. The RLO supported with translation. Data was collected primarily through the comments and feedback collected on sticky notes, supplemented by notes taken by a member of the Research Team. The data was then drawn together and analysed using thematic analysis.

## Resident insight

### The initial contact between National Energy Action and residents

The workshops began by discussing with residents the different ways National Energy Action had engaged with them at the very beginning of the WASH Fishwick project, encouraging the attendees to discuss what they thought worked well and less well based on their own experiences, and how this might apply to other household types.

#### Door knocking:

One method of reaching out to clients involved an National Energy Action Project Development Co-ordinator (PDC) going door-to-door to introduce themselves, National Energy Action, and the ways in which households could get involved and find out more information about the project.

However, residents noted that trust issues stemming from past failed installations made many householders wary of door knocking. Elderly residents, in particular, were often advised by family members not to open the door to unknown visitors. This made reaching certain groups—such as elderly residents or those with language barriers—difficult.

Workshop attendees suggested that, before any door knocking takes place, a letter should be sent to residents beforehand explaining what is happening and informing residents in advance that representatives will be in the area door knocking. Some residents said that they had acted as 'information hubs' for neighbours, providing them with information on what the project was about and how they could get involved. A key outcome here is an improved understanding of the importance of building up trust in a community and utilising the connections between residents that already exist.

#### Phone calls:

Most householders reported that the first contact made was by phone. This was a method that was adopted as a result of the global Covid-19 pandemic, which made going door-to-door impossible for some time. Some householders, however, said they didn't return the call due to a lack of trust and apathy. National Energy Action's involvement in Fishwick is not the first attempt made to rectify the damage caused to people's homes and, as a result, some people were understandably wary of calls from unknown organisations. This points to the value of face-to-face visits or opportunities in the community where possible, and taking the time to build trust.

## Letters:

Other householders reported receiving a letter from National Energy Action but, similarly to those who reported receiving a phone call, not trusting its validity due to previous experiences of receiving letters from registered companies but then not hearing back. Although suggested as a useful precursor to door knocking, some residents at the workshop reported that their elderly parents did not understand what had been said in the letter, it was only through the adult children looking through their post with them that they contacted National Energy Action and was informed of the project. Therefore, the early phase should look to engage whole families and support networks to ensure that householders do not miss out on support.

Two key themes emerged from this discussion, the first being that communication should be tailored to householders' needs. For retired householders, the preference for the initial contact was face-to-face in the community. However, for other households such as those with children or where householders work, email contact was preferred. Contact should consider vulnerabilities and any potential exclusionary factors (e.g. disability, language or digital exclusion) and ensure information reaches people in a format that they are comfortable with. It is also important for communication to be linked with one person from the programme management organisation, in this case an National Energy Action PDC. This was seen as being particularly useful for vulnerable people, help minimise confusion and avoid residents having to repeat information.

The second key theme is proving the validity of the project. This was especially important for a project based in Fishwick, as the community had been let down by projects such as this in the past. In the workshops, almost all discussed the Launch Event held at the Preston Community Hub. This was attended by project stakeholders and the local MP and provided information on what to expect from taking part in the project, including the data that would be collected from residents and when, and the different stages of the building works required. The support of the local authority and elected officials (local MP) for the project gave householders confidence that the project was endorsed and trustworthy and, as such, worthy of applying for. Therefore, having buy-in from a trusted name was seen as vital in the early stages of the project.

Information displayed on National Energy Action's website enabled householders to access details of the project in their own time, from a genuine source. This also reassured clients that the project wasn't a scam. One of the suggested improvements for future projects discussed in the workshops was having a pilot home which could be used to gain trust from the community and showcase what works the project intended to carry out.

Both tailoring communication and proving the validity of organisations involved in the project were seen as important in building trust among the community and encouraging them to engage in the project.

## Managing expectations

One area for improvement that was highlighted in the workshops focused on managing expectations. This was more prevalent for phase 1 residents than phase 2, perhaps related to early lessons being learned and change implemented by the project delivery team. Building trust in the early stages of phase 1 proved to be especially challenging due to the project's early stage of development. It wasn't clear to National Energy Action exactly what work they would be able to carry out or on what scale. Early information provided was misinterpreted by some residents as firm commitments as to what would happen and consequently led to disappointment when budgetary or logistical limitations altered plans. In the workshops, residents discussed the importance of having a written record of works that will be carried out, as householders reported mixed messages and where the catalogue of works discussed did not occur and they were not provided with explanations as to why. A follow up letter or email to confirm what was discussed and next steps would help to avoid disappointment at later stages and manage expectations.

## Prior to the work being carried out

The discussion in the workshops progressed along the timeline, moving from the initial contact through to communication prior to works being carried out. At this time, clients would be applying to take part in the project and would be in communication with the project team over their eligibility, the condition of their homes, and what work the contractors would be able to do.

## Importance of face-to-face contact

The theme of proving the validity of the project and those organisations involved continued on from the initial contact phase of the customer journey into the communication prior to works being carried out. In order to sign up to the project, clients had to complete a questionnaire which assessed their eligibility, followed by home visits from the Project Team and Seddon, to assess the condition of the homes. Some householders noted that having several surveys to complete increased the trust in the quality of work, and having regular home visits and calls increased confidence and perceptions that the project was legitimate. Regular face-to-face contact, where possible, is seen as vital for building trust.

## Impact of COVID-19

When discussing communication prior to works beginning, the impact of COVID-19 on the timescales of the project became obvious. Some householders

reported a lengthy period between the local MP event and their sign-up questionnaire being completed. Similarly, householders then reported waiting a long time between the survey being completed and work beginning. During this time, residents in the workshops were mixed on whether or not they felt the communication offered was enough, resulting in some householders fearing works would not go ahead.

During this stage of the project journey, information at regular intervals was noted as being very important. It was felt by workshop participants that this would assure them that works were still proceeding and to let them know any changes to the timescales. Information being readily available in a range of formats, including email, text, or letters to suit the needs of all households was discussed. The preferred timing of this information varied, with some preferring to receive information monthly, others bi-monthly or simply just as significant updates emerged. What was important was that the message was clear and consistent, and the same across all channels. Again, the importance of using communication methods tailored to client needs was seen as important.

## While the work was being carried out

The next step along the timeline was the communication while the work was being carried out. At this point in their journey, residents would be in regular contact not just with National Energy Action, but with Seddon as well.

### Keeping households informed

In the workshops, residents were satisfied with communication during the time that the works were being carried out on their homes. Householders appreciated when contractors checked in before starting work, ensuring that they were comfortable with the schedule. This was especially important for elderly or vulnerable residents, who sometimes preferred to be present to keep an eye on what was being done.

There was a suggestion in the workshop for ways to improve this process, however. While many householders felt well-informed, some experienced gaps in communication, particularly around delays and unexpected changes to appointments. One of the most consistent points raised in the workshops was the need for regular and reliable updates throughout the building process.

Some workshop attendees discussed wanting more frequent updates from the contractors in relation to any delays. Alongside the issues caused by COVID-19, contractors also experienced delays caused by weather. For residents who have children at home, or were supporting elderly parents/relatives, or for those who work from home, knowing any issues in a timely manner would help them plan their time and schedules more efficiently. Similarly, this would also help where contractors had to cancel or reschedule appointments.

In line with this, in the workshop, residents also discussed the importance of having a single, regularly updated resource (e.g., a National Energy Action website) to provide real-time information on project progress. Some householders also recommended monthly or bi-monthly newsletters via different channels to ensure key messages reached everyone.

## Accessibility and points of contact

Having clear and accessible communication channels made a significant difference to householders. Many residents felt reassured that they knew who to contact and could expect timely responses.

As has already been discussed, having multiple communication channels available to clients made a real difference to the residents across the course of the project. While the works were being carried out, communication over WhatsApp was introduced and was seen as particularly effective for sharing pictures and videos to highlight issues quickly.

As well as this, Seddon were praised for their visibility within the community. Householders appreciated having a supervisor regularly on site, with an office in the Preston Community Hub where they could raise their concerns in person. Workshop attendees also discussed how easy it was to approach and talk to the builders and contractors on the street.

One of the key differences in the communication during the works being carried out, however, was the introduction of a local RLO. This role was essential, acting as a reliable go-between for the contractors and householders. Being a local resident themselves, they were someone the residents immediately trusted and could rely on to support with any assistance needed (e.g., translation) and organising works. Many householders felt comfortable with and trusted the RLO to co-ordinate work on their behalf. All workshop attendees were in agreement over the importance of having a local face involved in the project.

## Minimising disruptions to everyday life

The workshops highlighted the importance of minimising the impact of the work on daily routines and relationships within the community.

Many householders appreciated when work was planned around their availability, particularly for those with jobs or caring responsibilities. As mentioned, workshop attendees praised the communication around this, and discussed how contractors would talk through schedules with the householders and could be flexible – in some cases prioritising external work before moving inside.

There were some areas here that the residents felt could be improved on. For example, some householders experienced delays in the removal of leftover

materials, with instances where waste was left in gutters leading to flooding. In other cases, householders were told materials would be collected but had to chase contractors multiple times in order for this to happen. Setting clearer expectations for aftercare would help manage these frustrations.

As well as this, some residents felt that communication with the wider community could have been better. Issues such as scaffolding, parking disruptions, and noise sometimes created tension. It was suggested that strengthening engagement with the wider community could help mitigate these challenges.

## Following the completion of the works

The final stage of the workshop looked at the communication post-works. This captured the sign-off meeting following the completion of the works, and expectations around future communication between the Project Team and the community.

### Post-work visits

Following the completion of the works being carried out, there was a 12-month defect period before documents such as warranties were provided. This was to ensure enough time for any issues to be resolved.

In this time, many households in the workshops reported there being enough visits from the delivery team post-works. Residents discussed feeling as though their concerns were taken seriously by the project team, and any issues would be investigated by the team. Householders noted how on reporting an issue, such as anything missed, it was rectified within a day of the project team being notified. Those who attended the workshops praised the communication and action taken to fix minor issues and were happy with the with quick response and resolutions.

Some householders felt the final sign-off meeting was useful and an explanation of how new equipment or appliances worked was provided. Householders noted that all their concerns were taken seriously and investigated thoroughly with any questions answered.

## Support with using new technology and managing air quality at home

Despite satisfaction with the final meeting, many householders said they would have liked the information on using new appliances to be provided in other formats, such as through leaflets with written instructions.

Similarly, many householders reported a need for clearer explanations, potentially through training sessions on things such as ventilation, damp,

warranties, and extractor fans to improve their knowledge and understanding. Some householders reported not knowing what extractor fans were used for so communication on what they were, and their usage, could be improved. This should be communicated in a range of formats including written, verbally or given as part of the final pack of documents. Householders reported wanting to share that knowledge and information with their friends and families, but information provided in 'sign-off' pack for households would also allow them to refer back at a later date should any issues arise (e.g. how to operate an appliance or troubleshoot).

## Warranties

The final sign-off meeting was the point at which the warranties for new appliances were given to householders. In the workshops, discussions seemed to indicate a need for greater awareness of warranties as many householders reported not checking their warranties or not knowing how long their warranties lasted for. Residents also reported that they would only look at the documents if something was to go wrong, and some expressed a preference for digital copies either alongside, or instead of, the paper copies.

## Looking ahead

When looking ahead, some residents expressed concern around not knowing who to contact if they experience any issues. Although contact details were included with warranties, householders discussed the importance of providing resources for who to contact for anything else and in other forms too, such as a website, email or having someone they could call to ask.

When discussing future involvement from National Energy Action, residents were mixed on the amount, and frequency of, future contact between themselves and the project team. Some householders reported wanting yearly check-ins whereas others thought that after the final sign-off meeting they wouldn't need any further support.

## Recommendations

The community workshops provided residents with an opportunity to share their experiences of the customer journey throughout the WASH Fishwick project. Residents were able to reflect on their own journeys, as well as considering what might work well for other household types as well. The workshops provided a valuable opportunity for learning within the delivery team, examining the areas that residents felt worked well for them but also where there is scope for improvement when designing similar projects.

Following the analysis of the data from the workshops, the following recommendations are suggested for future similar projects:

### Planning and communication

- As far as is possible, clearly defining the project scope and objectives before communicating the project to residents is important in building trust and managing expectations.
- Early phase work should look to engage whole families and support networks to ensure that householders do not miss out on support, especially in cases where the householder may be older, require additional care, or not speak English as their first language.

### Community engagement

- Allow time for trust to develop within a community, especially where households have had negative experiences in the past.
- Prioritise relationship building and establishing trust in the community during the early stages of the project. This may include buy-in from a trusted name, for example, the local MP or community leader.
- Communication should be tailored to householders' needs, considering vulnerabilities and ensuring information reaches people in a format that they are comfortable with. This should also account for language barriers and translation where required, including having such skills among team personnel.
- Future projects should consider embedding a local Community and Resident Liaison Officer very early in the project. The role of the RLO was critical to the success of WASH Fishwick project. They should be a local, visible face that is easily contacted, spoken to face-to-face and who can facilitate and/or provide translation or other address other accessibility issues. The trust developed with the RLO also enables an effective liaison-point and support for communication between householders, programme managers and contractors.

## Managing relationships while work is carried out

- Provide a written record of works that will be carried out through follow-up emails to discussions and what is going to happen would help to avoid disappointment at later stages and manage expectations.
- Ensure contractor/builders are visible, accessible and approachable in the community, through having offices or a presence in the local community (e.g. community centre).
- Tailor building works to the support needs of residents, e.g. checking if vulnerable residents wanted to be present at home during the works, if they wanted a family member or friend present or fitting work in around the routines of young families.
- Establish good communication between contractors/builders and householders to ensure prompt arrival and appointment keeping. Pre-contact with the householder if they are unable to attend the appointment is important, particularly with consideration for those who work and have caring responsibilities.

## Aftercare

- Ensure documentation is available in a range of formats, including preferred language and digital and/or paper copies, to suit the householder preference.
- Allowing a 12-month 'snagging' and follow-up window before completing the final sign-off meeting is important to allow households to communicate and have any issues in their home addressed.
- Work with residents on how to manage ventilation and damp within their homes, recognising the links between the physical changes to the house and how residents live in their homes.
- Provide residents with a guidance package that outlines the warranties and guarantees for the works, with detailed information on where to access help if anything goes wrong, and how to claim against any relevant warranties or guarantees in that event.
- The RLO should conduct a comprehensive "stress test" of the warranty claim process to identify potential obstacles and ensure its effectiveness. To support householders, the guidance package should include clear, step-by-step instructions, making the process accessible and straightforward.