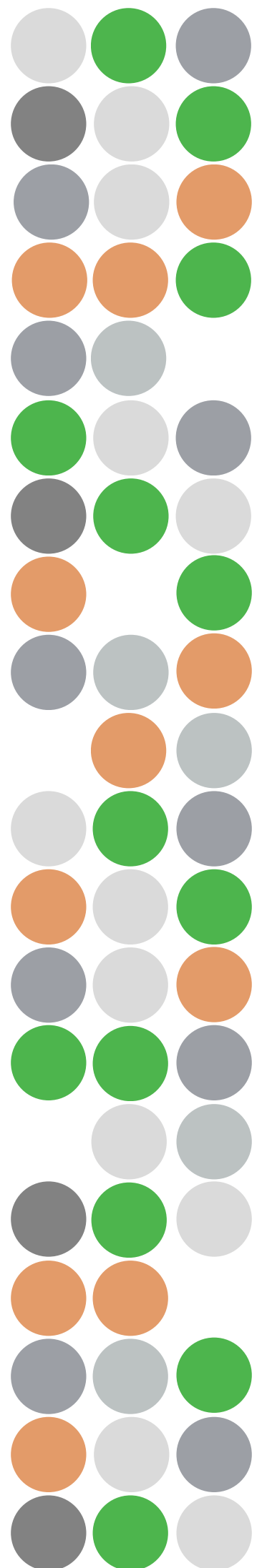


RETROFIT SUCCESS

Strategic planning for
area-based retrofit





About SHAP

Originating in the West Midlands and now with a national reach, the Sustainable Housing Action Partnership (SHAP) is a not-for-profit organisation working to advance the transition to net zero across the housing sector. We work with organisations from the public, private and third sectors to turn ambition into action.

For 20 years, SHAP has worked at the forefront of sustainable housing, driving change through innovative research, thought leadership, and the development and sharing of best practice. Our network and client base spans housing associations, local and combined authorities, charities, community groups, academic institutions and businesses.

Our Vision is one of thriving communities with sustainable, high quality, low carbon homes.

Our Mission is to accelerate the delivery and impact of net zero, by leading and promoting best practice on the environmental, social and economic aspects of sustainable housing.

SHAP's Board is drawn from across the sustainable housing ecosystem and brings together leaders with deep, collective experience of the sector's successes and challenges. Providing strategic oversight, they help steer SHAP's work, ensuring it responds to sector needs and remains relevant, credible and impactful.



Ellie Horwitch-Smith
(Chair), Assistant Director
- Route to Net Zero,
Birmingham City Council



Steve Hale (Treasurer),
Affordable Housing
Consultant



Gemma Brookes
Head of Asset
Optimisation, Orbit



Carl Yale
Regional Managing
Director, Lovell



Rebecca Reynolds
Head of Sustainability,
Equans



Gordon Watts
Technical Manager - Low
Carbon, Energy Saving
Trust



Sam Shea
Head of Policy, Insight &
Engagement, Talan



Gemma Voaden
Senior Manager Net Zero,
Together Housing Group



Peter Harte
Consultant, Turner &
Townsend



Monica Mateo-Garcia
Associate Professor in
Sustainable Built
Environment, Birmingham
City University

This guide is one of eight thematic guides developed with insights from 70 organisations, drawing on practical retrofit experience in real homes, streets and communities.



Communicating retrofit effectively



Community and resident engagement



Data and digitalisation



Financing and procurement for retrofit



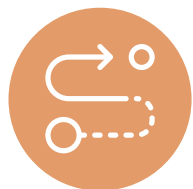
Governing and managing retrofit delivery



Retrofit evaluation and improvement



Skills and workforce development



Strategic planning for area-based retrofit

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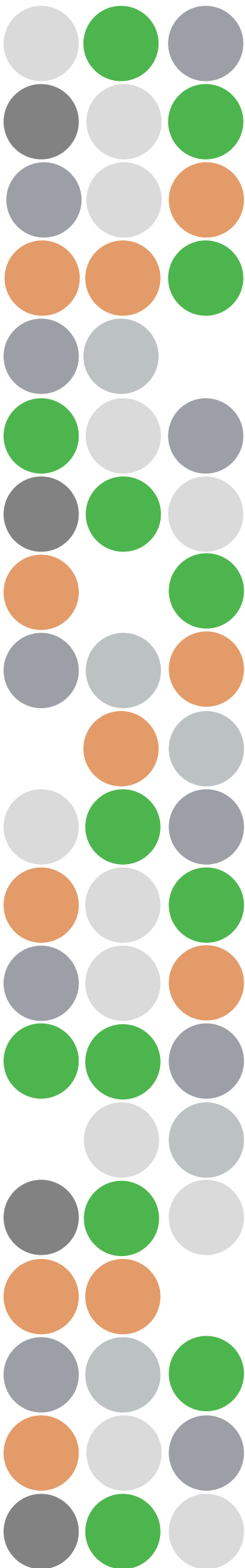


1.0 Introduction

This guide is part of SHAP's Retrofit Success series; practical, experience-led resources to support more effective retrofit delivery. Developed with nearly 100 contributors, the series reflects decades of first-hand insight from those shaping and delivering retrofit on the ground. For fullest value, we recommend reading this guide alongside the Retrofit Success in Summary document which captures the shared context, core insights, and opportunities for adopting great practice, as well as guidance on how we can be more bold in designing and delivering retrofit.

This particular guide focusses on long-term area-based planning, which isn't just a delivery method — it's the only viable route to retrofit at the scale and pace required. Without it, efforts remain fragmented, inefficient, and prone to duplication. Planning retrofit one property or funding round at a time leads to disjointed interventions, missed economies of scale, and short-term fixes that fail to embed lasting change. The result is friction: stop-start programmes, stranded homes, rising costs, and communities left behind.

This guidance sets out how to embed long-term, place-based planning before, during, and after retrofit delivery — and what needs to be in place to make it work. Each section includes actionable best practice alongside ideas for how we can go further. These reflect not just technical design or coordination, but the wider enabling conditions — such as funding certainty, local data infrastructure, and cross-sector partnerships — needed to deliver retrofit with purpose, continuity, and confidence. Together, they offer a route to more strategic, place-rooted delivery and more resilient outcomes across the system.



The guidance



2.1 Planning for retrofit delivery

Best practice **now**

01

Establish a long-term, place-based retrofit vision aligned with local priorities

Avoid short-term, stop-start delivery by anchoring retrofit plans in a wider vision for place — linked to local energy, health, and housing strategies. This provides stability for partners and clarity for residents.

02

Use housing archetypes and geospatial data to shape clear area priorities

Map housing stock by type, tenure, and need to identify logical clusters. Targeting retrofit in defined areas with similar property types reduces costs and complexity, and supports consistent local messaging.

03

Layer in fuel poverty, health and income data to target households most in need

Use datasets like EPCs, fuel poverty risk, income deprivation and health outcomes to plan equitably. Tackling cold homes in high-need areas first can multiply the social return of retrofit investment.

04

Engage key stakeholders early to co-design areabased plans

Bring together housing providers, local authorities, community groups and delivery partners before finalising plans. Early co-design helps align objectives, identify conflicts, and reduce resistance later.

05

Plan for continuity across funding rounds

Develop long-term area plans that can flex around funding windows, rather than starting from scratch each time. This increases efficiency, supports market confidence, and avoids repeatedly re-engaging the same households.

06

Identify enabling works and common constraints upfront

Scope works such as electrical upgrades, structural repairs or planning permissions early. This de-risks delivery and allows time to address blockers that would otherwise cause delays or exclusions.



07

Create a local retrofit pipeline that spans tenure types

Even if funding is tenure-specific, plan across social, private-rented and owner-occupied homes to deliver at area scale. Mixed-tenure planning supports economies of scale, consistent community engagement and neighbourhood level impact.

08

Be transparent with communities about what's coming — and when

Set expectations clearly and early. Publish area-wide plans and timelines so residents aren't left guessing or hearing rumours second-hand. This builds trust and reduces resistance when delivery begins.



How we can be **bolder**

01

Align area-based planning with spatial development and decarbonisation strategies

Treat retrofit as core infrastructure. Embed it in Local Plans, Local Area Energy Plans and Net Zero strategies to unlock integrated investment and avoid siloed delivery.

02

Create enabling frameworks for delivery partners

Use local procurement frameworks, data-sharing agreements and governance templates to reduce duplication and support a more coherent delivery ecosystem.

03

Use area-based planning to strengthen the retrofit supply chain

Signal demand over the long term so local suppliers can invest in training, tools and staff. Area-level visibility helps build sustainable markets and reduce costs.

04

Pool intelligence across councils and housing associations

Create shared retrofit maps, data layers and delivery priorities across neighbouring areas. This avoids duplication and enables joint procurement and delivery planning.

05

Embed community engagement at the planning stage — not just before install

Work with local groups early to understand perceptions, needs and priorities. Involving residents at the outset improves plan legitimacy and helps shape better outcomes.

06

Establish governance structures that hold the long-term vision

Create cross-sector steering groups or boards that outlast funding cycles. They provide continuity, troubleshoot problems, and protect the integrity of the area plan over time.



07

Use retrofit planning to inform wider neighbourhood improvement

Don't retrofit in isolation. Align with green space upgrades, transport plans or regeneration to maximise impact and community value.

08

Coordinate with utility providers and infrastructure owners

Engage grid operators, water companies and telecoms early to address potential constraints and align upgrade works. Area level coordination prevents retrofits being undone by later infrastructure works.

09

Pilot local data platforms that integrate stock, community and infrastructure data

Build shared digital maps or dashboards to guide area prioritisation and track delivery. These can evolve into place-based planning tools that serve multiple stakeholders.



2.2 During retrofit delivery

Best practice **now**

01

Coordinate delivery partners around local, place-based goals

Ensure contractors, assessors, and engagement teams understand the wider strategic aims of area-based retrofit — not just the technical brief. This helps unify messaging, spot interdependencies, and avoid short-termism in delivery.

02

Adapt delivery to local property archetypes and lived conditions

Area-based planning works best when delivery teams are equipped to respond to the dominant housing types, local materials, and occupancy patterns. Tailoring retrofit designs to reflect these realities supports quality, efficiency, and trust.

03

Phase delivery to minimise disruption and build local confidence

Staggering works across small zones, rather than flooding whole streets, enables quality control and better resident experience. It also allows space to learn, improve and share progress visibly as momentum builds.

04

Treat monitoring, aftercare and engagement as part of active delivery

Support for residents, troubleshooting, and data gathering shouldn't be pushed into the 'aftercare' phase — they should begin during delivery. This reduces failure demand, builds insight, and prevents reputational damage from unresolved issues.

05

Use community assets and local infrastructure to anchor delivery

Libraries, schools, community centres and trusted local organisations can act as delivery hubs, information points and anchors of continuity. This gives retrofit a visible, localised presence and reinforces trust over time.

06

Create open lines of communication between site teams and local authorities

On-the-ground delivery generates insight into real-world issues — but this may not be communicated clearly. Establishing structured feedback routes between delivery partners and commissioning authorities helps adapt delivery in real time and strengthen future planning.



07

Map and respond to place specific barriers in real time

During delivery, new constraints often emerge — e.g. parking limitations, heritage restrictions, or resident access needs. Build in rapid-response loops that allow decisions to be made quickly and locally, rather than escalating to distant programme leads.

08

Ensure delivery visibility supports wider community buy-in

Visible, branded worksites, local signage, and real-time updates help normalise retrofit within the community. They can also create a sense of pride and shared momentum that supports longer term engagement across the area.



How we can be **bolder**

01

Establish a local retrofit coordination team to oversee area delivery

Create dedicated roles or secondments that sit across partners and manage the interface between strategy, community insight and delivery. This localised leadership helps ensure that area-based plans survive the realities of delivery.

02

Pilot neighbourhood-based delivery hubs with shared contractors, data and engagement functions

Rather than working in silos, explore place-based hubs that pool contractor teams, engagement staff and performance data within defined geographies. This builds continuity, avoids duplication and supports joined-up delivery over time.

03

Mandate cross-tenure delivery within area-based schemes

Long-term planning means looking beyond social housing stock. Include owner-occupiers, leaseholders and private rented homes in area-based plans — even if through signposting, staggered offers or separate funding streams — to ensure whole-street impact.

04

Embed social value delivery into the retrofit process itself

Use live retrofit delivery as a platform for skills, jobs and education within the neighbourhood. Apprenticeships, school visits and local employment targets can be built into area-based schemes to deliver wider value.

05

Create digital ‘living maps’ of retrofit progress by area

Enable councils and partners to visualise what’s being done, where, and what’s next — integrating housing data, resident feedback, delivery milestones and community engagement. This supports transparency, planning, and coordination at scale.

06

Use area-based delivery to test scalable net zero infrastructure

Pilot complementary innovations alongside retrofit — such as shared heat networks, EV charging, or digital twin technologies — to test what integrated net zero looks like at neighbourhood level.



07

Formalise shared evaluation and learning loops at the neighbourhood level

Introduce regular local review forums during delivery, where contractors, community groups and programme managers share what's working, adapt plans, and surface challenges. This enables fast learning and builds local ownership.

08

Reinvest savings from reduced failure demand into long-term area planning

Where smoother delivery reduces callouts, complaints or rework, track those savings and channel them back into maintaining engagement and planning future phases. This helps turn short term wins into sustained local benefit.



2.3 After retrofit delivery

Best practice **now**

01

Evaluate delivery against local strategic aims, not just technical KPIs

Post-delivery reviews should assess whether retrofit contributed to area-wide goals — from health to community confidence — not just whether measures were installed. This helps clarify value and refine future planning.

02

Conduct visible, neighbourhood-level impact reviews

Don't keep evaluation behind closed doors. Share what worked, what didn't, and what will change — through public dashboards, drop-ins or community newsletters — to maintain transparency and local trust.

03

Maintain a local presence to support transition into long-term use

Keep some team capacity or drop-in support available post-install, so residents and communities feel supported as they adapt to changes. This soft landing helps embed learning and prevent disengagement.

04

Track social, economic and environmental outcomes at area level

Go beyond individual homes. Monitor how retrofit has affected community warmth, pride, air quality, or local economy — building a richer picture of value and progress over time.

05

Capture lessons across tenure and property types

Whole-area retrofit reveals patterns: which archetypes respond well, where resident support was strong, or what delivery models underperformed. Use this to refine targeting and improve future delivery cycles.

06

Keep lines open between delivery partners and local authorities

Encourage contractors, assessors and support staff to feed back honestly on what did or didn't work, so this knowledge informs area strategies going forward — not just future procurement.



07

Use post-delivery time to re-engage the wider community

Retrofit often reaches one cohort at a time. Use successes to reengage those not yet involved — showing tangible benefits and readiness to support future phases.

08

Embed aftercare in local service infrastructure

Don't rely solely on contractors or housing teams for postinstall support. Where possible, integrate retrofit aftercare into existing advice services, community organisations or health partnerships for continuity and trust.



How we can be **bolder**

01

Formalise long-term local retrofit strategies that span election and funding cycles

Develop place-based retrofit masterplans that survive short-term delivery pressures — setting long-range goals with flexibility built in for changing funding or governance.

02

Create rolling programmes of continuous, phased improvement

Rather than ‘one and done’ retrofit, move to iterative areabased models — where each year builds on the last, responding to learning and evolving conditions.

03

Develop neighbourhoodbased evaluation frameworks

Design locally-sensitive metrics for success — including resident experience, local economic uplift, or carbon saved — and use these to shape future investment decisions.

04

Commission longitudinal studies that track impacts 5–10 years on

Work with local universities or health partners to track how retrofit affects residents’ health, bills, mobility or wellbeing over time — building a much deeper case for long-term area approaches.

05

Align post-retrofit evaluation with other public service agendas

Partner with health, education and regeneration teams to jointly evaluate retrofit outcomes. Shared evidence can unlock new funding routes and integrated interventions.

06

Build local capacity to manage retrofit knowledge and progress

Train or second staff within councils or anchor organisations to maintain continuity, retain learning, and act as custodians of the area’s retrofit journey.



07

Use completed delivery phases to unlock wider area transformation

Retrofit can be the first step in longer-term place improvement. Leverage learning and engagement to support decarbonised transport, greening, digital infrastructure or active travel planning.

08

Establish area-based data platforms to guide and sustain planning

Create live, centralised datasets on housing condition, resident experience, performance outcomes and delivery learnings — enabling better future targeting, funding bids and system coordination.

Thank you to our contributors

