Centre for Sustainable Energy

South West Retrofit Advice Provision in the Community Sector

Report and recommendations to South West Net Zero Hub (SOUTH WEST NET ZERO HUB) from Centre for Sustainable Energy, Severn Wye Energy Agency and Plymouth Energy Community

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1. Executive Summary

This report presents research on community led domestic retrofit advice across the South West, with recommendations for scaling and strengthening the sector in readiness for the Warm Homes Plan. The research draws on desk based analysis, data from a survey of retrofit advice providers, feedback from an in person workshop, and interviews with stakeholders representing the sector. It explores the skills, standards and support needed to deliver community led retrofit advice, and identifies examples of best practice. It has 7 key findings:

1. **The South West has a strong local energy advice sector and an established delivery base to build on**. The research engaged 28 organisations whose collective footprint covers 33 of the 35 South West Net Zero Hub (SWNZH) council areas. The nine South West Energy Advice Providers Forum (SWEAF) organisations are well networked and collaborative, together supporting more than 26,000 households annually through their wider energy advice services. There is good geographical coverage and breadth of provision across the South West, although energy advice organisations vary considerably in their size, resources, service offer and expectations of adviser knowledge. Some differences reflect local needs and specialisms; others reflect limits on capacity. It is not the case that every community can access the full range and depth of retrofit advice it needs.
2. **Local advice brings benefits that are hard to replicate**. In a sector where opportunities, technologies and understanding change in relatively short timeframes, trusted, local, tailored advice is important. The value of trust, impartiality, local knowledge, personalised support and connections into wider local services and supply chains are recurring findings. Stakeholders identify these relationships as important in reaching households, understanding their circumstances and building confidence. Their contribution goes beyond initial engagement to supporting people as they work through decisions about their homes.
3. **Retrofit advice is a journey, not a single intervention**. Advice approaches need to be tailored to different households' needs. Journeys tend to be long, non-linear and require multiple touchpoints, from awareness and engagement through to planning, installation and follow-up. Some clients require wrap-around support throughout; others engage at particular stages, and there is not a universal pathway, or an optimal progression from one methodology to the next. People do not always arrive asking for retrofit advice: opportunities for longer-term improvements often emerge through help with immediate energy concerns. The research highlights the connection with wider energy advice and the difficulty of maintaining follow-up when it is not funded.
4. **Seven different advice methodologies were defined and explored; no single method meets every need.** Outreach was the only method universally used by surveyed organisations. Non-technical home visits, remote support and telephone advice were the next most common. Organisations tailor and specialise their approaches. Telephone and remote advice offer opportunities for reach and efficiency; home visits and open homes

offer deeper engagement. The report concludes that no single approach provides the 'super hat trick' of low cost, high reach, high trust and in-depth retrofit support. The best advice is tailored to the household and to helping people make appropriate decisions (including what not to do, as well as post installation support). Effective retrofit advice takes a whole-house view, considers how measures interact and helps people understand risks and sequencing. It also recognises the value of repairs, maintenance and getting existing systems working well. Success is not simply more installations: an informed decision to delay, repair first or rule out an unsuitable measure can also be a useful outcome.

5. **The capability requirement is increasing.** There are gaps between assessment-focused qualifications and the broader competencies needed to support customers on these long journeys. These include communication and practical understanding of buildings, moisture, ventilation, repair and technology use. Expectations of adviser knowledge are not consistent across organisations or training provision. There are no nationally (or regionally) agreed advice delivery standards or competency frameworks, and there is overlap between basic energy advice and retrofit advice. Stakeholders describe a more complex advice landscape, with demand for a strong inter-personal skills and knowledge across a broader range of measures, technologies and funding options. Qualifications are part of the picture, but practical experience, ongoing learning and access to specialists also matter.
6. **Long retrofit journeys make outcomes difficult to track.** Funding rarely pays for longitudinal follow-up, so the sector struggles to demonstrate all of its value. The outcomes identified extend beyond installations to include plans, confidence, comfort, energy and bill savings, behaviour change, and decisions to avoid unsuitable measures. Actual and modelled outcomes also need to be distinguished.
7. **Short-term, inconsistent funding undermines service continuity.** Providers report that inconsistent funding constrains both take-up and continuity of advice services, making it harder to retain experienced staff and requiring teams to train replacements. The resource requirement also extends beyond direct client contact to preparation, travel, administration, supervision and follow-up.

2. Recommendations

Recommendations from this research centre on strengthening local retrofit advice capacity and capability, building on existing services and relationships. Local organisations (i.e. known, and embedded in the community) bring trusted engagement, property- and household- specific advice, scheme navigation and ongoing support for both self-funded and grant-led retrofit. The published Warm Homes Plan already envisages national online and telephone advice and consideration of integration with local services. although details of how the relationship between these components will transpire are not yet clear. The next step is to map out how national and local components could work together, with an eye on a coherent advice pathway from initial interest through to installation and optimisation. This includes understanding where provision is limited and what support organisations need to develop their offer.

1. **Build on existing local advice services and understand where the gaps are**. The report recommends recognising community organisations as long-term delivery partners, with a role beyond initial engagement and awareness raising (which requires less organisational capacity to deliver). Alongside this, further mapping could establish where advice is missing, limited or difficult to access, and which households are not accessing current advice pathways. This would help distinguish between support needed to develop existing services and new provision needed in areas where adequate services do not yet exist. Organisational size alone should not be treated as a measure of competence.
2. **Develop a shared understanding of good local retrofit advice.** This is not about prescribing a narrow group of methodologies, but a framework focused on outcomes for the consumer and the competencies required from the adviser. The report recommends a shared competency framework combining technical knowledge, communication and practical experience, alongside clear development pathways. These need to reflect different roles, specialisms and organisational starting points. Peer-to-peer learning and specialist referral routes can help advisers understand both what they can advise on and when to bring in additional expertise. Any national role in this work would need to be agreed across the sector.
3. **Make every step of the customer journey count.** Each intervention should leave the householder better informed and supported to decide their next step. That journey needs to be as frictionless as possible, whether the enquiry comes through an installer, a finance provider, a national advice line, a local one-stop shop or existing energy, fuel-poverty, housing and community support. The report recommends a mix of advice methods matched to household needs, with clear routes between services and the ability to return for further help, including after installation. Confidence matters, but so do affordability and the practical barriers people face.

4. **Keep advice wholistic, customer-centred, realistic and usable**. The household's circumstances, capabilities, priorities and drivers, and where they are on their retrofit journey, need to shape the advice. This includes actual energy use, affordability, health and comfort, the interaction and sequencing of measures, and potential risks. Advice (and outcomes) should recognise the value of repair, maintenance, appropriate tariffs, smart energy technologies and tariffs, customer confidence, and getting systems working well, including after installation. The aim is an informed next step, not treating one method or service as the answer to every need.
5. **Develop people, not just qualifications.** The report recommends that advice organisations seeking to scale recruit for communication skills, relevant experience and a willingness to learn, alongside technical competencies. The sector would benefit from competency frameworks that complement formal qualifications and clearly set out technical knowledge, customer support skills and continual professional development requirements. Standardising expectations while promoting access to specialist expertise and peer learning would help ensure households receive accurate, consistent and high-quality retrofit advice. However, formal adviser training needs to be combined with shadowing, mentoring and continuing professional development (CPD), including practical knowledge of local buildings and traditional buildings. Advisers also need supervision and access to specialist support, rather than being expected to know everything: no single team member can meet all retrofit advice needs.
6. **Make the practical learning accessible to community organisations.** A resource guide could bring together the advice-method comparisons, workforce-development learning and examples of delivery for organisations wishing to expand their offer. It could help groups understand where they fit, choose approaches that suit their communities, identify skills and support needs, build partnerships and plan the full resources required. This would help organisations identify opportunities, build on their strengths, and extend what they can offer (and what is needed to do that well), without expecting every group to do everything.
7. **Provide longer-term funding that covers the full cost of delivering advice.** It's already understood that stop start funding and financial support has negative impacts on customer confidence and retrofit take up. Funders and commissioners need also to recognise that good retrofit advice relies on experienced teams who can support households over time. That means funding which allows organisations to retain and develop those teams, rather than repeatedly rebuilding them between short-term projects. It also needs to cover the work around each advice session (including preparation, travel, casework, administration, eligibility checks and follow-up). with explicit allowances for supervision, training, CPD and accreditation. The aim is to give organisations the stability to maintain their service, and households a reliable place to return when they need further help.

3. Context

3.1 Definitions

For the purposes of this work, energy advice is defined as being *advice that is specific to individuals and their circumstances, with the aims of improving household energy efficiency, comfort and the ability of a household to achieve affordable warmth*.

Advice requires a two-way communication between advisor and client so that it is clear what the client's priorities and circumstances are. It can be carried out face-to-face or over the phone, but not by passively by providing literature / digital content only. In other words, it is more than the provision of information.

Retrofit is taken to be *any home renovation or improvement work that improves existing buildings' energy efficiency*. Retrofitting creates homes that use less energy, are healthier to live in, easier to heat, and better able to retain warmth. Retrofit improvements also help buildings transition to clean energy instead of dirty fossil fuels, and retrofitting buildings is crucial for meeting our carbon reduction targets.

The survey which fed into this report tested a description of retrofit advice, which distinguishes it from other forms of energy advice. This provided a focus for the research and framed the scope for exploring methodologies. 91% of organisations surveyed for this research said they 'Mostly' or 'Totally' agreed with this description:

Retrofit advice includes topics such as: Renewable tech; Fabric measures; Moisture, ventilation and risk; Smart meters and tariffs; Small measures and behaviour change; Historic building specific advice; PAS2035 Project coordination/management; Relevant grant schemes. It does not include providing light touch measures (e.g. bulbs, radiator reflectors); fuel voucher provision; or energy bill, metering and supplier issues. It can include advising people on risks and 'what not to do'.

Some respondents suggested bringing additional elements into the definition; defining light touch measures as 'light retrofit', and using the term 'home energy advice' in place of 'retrofit' to improve householder understanding and avoid confusion.

3.2 Retrofit advice topics

Survey responses and discussion at the in person workshop which fed into this work confirmed the wide breadth of what is seen as retrofit advice provision. During the event attendees were asked to name all the topics which could count as retrofit advice. Insulation and ventilation were the most frequently occurring topics, but there were a wide range of responses. Together with survey responses they have been grouped into 38 topic areas (see table below).

The picture which develops about retrofit advice is that it covers three main areas: understanding the technologies and their suitability; support with installation; and wider support. These are shown below, with examples.

Technology and building specific aspects

- ventilation
- insulation
- heat pumps
- solar panels

Support with implementation

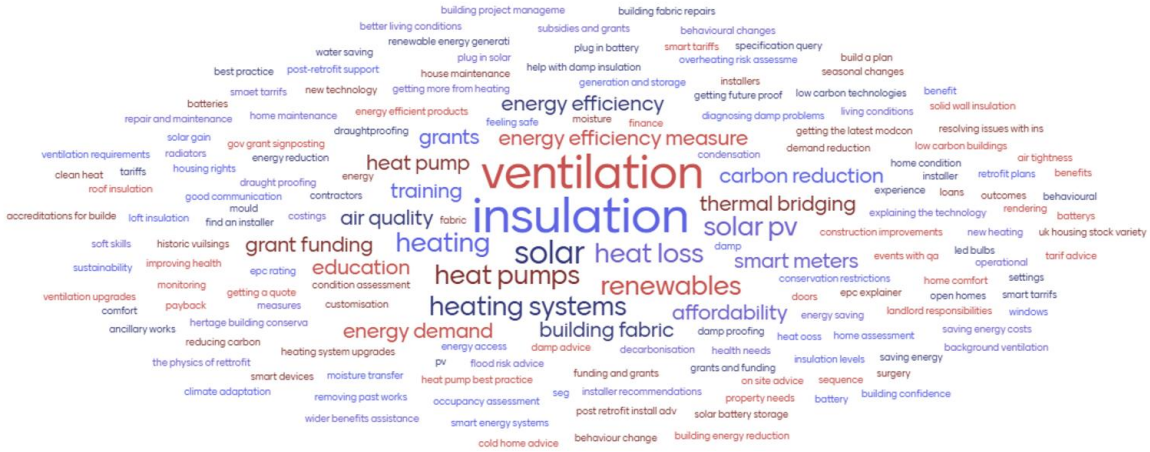
- action prioritisation and supply chain liaison
- grant schemes, finance support and tariff selection
- listed building applications
- quality assurance checks and regulations

Wider contextual topics

- landlord responsibilities
- green house gas emissions
- future proofing for overheating
- relationship to health

Many providers of retrofit advice combine retrofit advice with 'traditional' energy advice (e.g. bill support, supplier liaison, debt management, behaviour change practices, optimising thermostat controls). Integration of these services is seen as valuable.

"Name all of the topics which could count as retrofit advice"



Retrofit advice topic areas

Air quality	Heating systems (inc. radiators, controls, settings, optimisation, and upgrades)
Batteries (inc. plug in batteries)	Historic buildings (inc. conservation restrictions)
Behaviour change	Housing and Renter's Rights
Benefits advice	Housing stock variety
Bills and billing	Insulation (inc. different varieties suitable levels, help with issues and damp insulation)
Building fabric assessment (inc. heat loss and condition)	Installer recommendations (inc. how to find installers, and suitable accreditations)
Building physics (inc. thermal bridging)	Low carbon technologies (inc. LED bulbs)
Carbon reduction	Occupancy assessment
Damp and mould advice (inc. damp proofing; condensation and moisture)	Overheating and solar gain (e.g. shutters and shading)
Doors and windows	Planning and sequencing (inc. understanding how measures interact)
Draughtproofing and air tightness	Post install advice and operation
Emerging technologies and the 'latest mod cons'	Project management, quality assurance and handover of work
Energy awareness (inc. costs, demand, efficiency, reduction)	Repairs and maintenance (inc. render, or removing past works)
Explaining EPCs	Smart devices and automation
Finances (inc. affordability, costs, measure payback periods; available loans)	Smart meters
Flood risk advice (e.g. raising floors and sockets)	Solar PV (inc. plug in solar)
Grants and funding	Tariff Advice (inc. Smart Tariffs, and SEG payments)
Health, comfort and living conditions	Ventilation (inc. requirements, background and upgrades)
Heat pumps (inc. suitability and usage)	Water saving

3.3 Retrofit advice challenges

Every home is different and householders occupy homes in different ways, so retrofit measures are not a one size fits all model. That means retrofit advice has to be tailored and adapted for the audience and the property.

Installation of measures such as insulation, ventilation upgrades and low-carbon heating can't be addressed in isolation. In providing good advice, they need to be considered in conjunction with other measures. Risks are inherent in making changes to a property, but referencing suitability, sequencing, and technical installation can reduce the likelihood of negative consequences.

The extent to which advice provision drives take up is influenced by wider societal and cultural factors. Installing measures, even if designed appropriately, is often expensive and disruptive, and may not have an immediate financial or aesthetic benefit, so can be seen as less appealing as an investment. In addition, information about measures and their suitability in a given property can be inconsistent, limiting confidence on the right actions to take. Negative press, such as wide scale insulation failures, or persistent myths regarding (for example, heat pump suitability) also affect confidence.

Many low carbon technologies are still not well understood and often require significant behavioural changes to use them efficiently (for example, changing from a gas boiler to an air source heat pump). That means householders often need follow-up advice to support use of new technologies.

"Households need support before, during and after installation. A household receiving a heat pump, solar panels, insulation or a battery is not necessarily going to know how to use it effectively. This includes understanding which measures are appropriate, checking that work has been installed properly, helping people use new technologies and tariffs effectively and ensuring that household with PV are registered to receive SEG payments." Dan Stone, Centre for Sustainable Energy

3.4 Warm Homes Plan

This report was commissioned by the SWNZH to coincide with the launch of the Warm Homes Plan, setting out national ambitions to invest £15 billion of public money to upgrade up to 5 million homes by 2030 with solar panels, batteries, heat pumps and insulation in order to reduce fuel poverty and reduce energy bills.

The Warm Homes Plan is seen as an important opportunity for the South West region where there is a proportion of older, energy inefficient homes, many of which are not connected to the gas distribution network. Upgrading these homes is essential to reducing bills, improving wellbeing and also to meeting local net zero targets.

Mechanisms for distribution of investment and targeting customers are still to be clarified, but it is anticipated that the Warm Homes Plan will establish national advice support of some kind, provide opportunities for low interest loans, and improve quality assurance processes.

"The emerging Warm Homes Plan policy landscape provides opportunity for local energy advice to be more embedded, and to increase in scale to meet government ambitions. Local organisations are valued for their skills and add value to delivery." Alistair at Plymouth Energy Community

3.5 PAS2035 and other standards

Retrofit advice is affected by the regulatory context and PAS2035 has a bearing because since June 2021 it has been a requirement for work carried out under most government funded schemes . The PAS2035 framework was intended to ensure the adoption of a 'whole house approach', to limit unintended consequences from retrofit work. It sets out a process governing retrofit advice, assessment, design, coordination, evaluation and monitoring, and is regularly being updated.

Non-grant funded retrofit projects are not required to comply with PAS2035, and in these contexts (for example, a householder paying privately for energy efficiency improvements to their home), PAS2035 can be seen as a best practice framework which can be used to help guide and inform decisions around retrofit. However, full compliance can be complicated and hard to meet (e.g. on traditional buildings).

PAS2035 outlines specific roles within the retrofit process (Retrofit Advisor, Assessor, Co-ordinator, Designer and Installer). These roles, their suitability for adoption by community based organisations, and essential roles in retrofit take up which fall outside the PAS2035 framework, are discussed further in CSE's Community Retrofit Guide.

Besides PAS2035, the sector lacks any consistently applied and nationally agreed standards for retrofit advice services. However, the wider standards do apply to various aspects of the retrofit eco-system. For example:

- **PAS2030** - governs installation of measures on government schemes, as well as handover procedures to the customer (to include, evidence of compliance, and operation manuals). It is different to PAS 2035 (which is the overarching strategic framework and methodology for whole-house assessment and planning.) PAS 2030 is the technical specification governing the actual physical installation, commissioning, and handover of specific energy measures.
- **TrustMark** - records accredited installers, and can be important in resolving deposit and warranty issues.
- **Building Regulations** - underpin the legal standards which ensure health and safety, and energy efficiency.
- **Specific measure guarantee and certification frameworks** – for example Cavity Insulation Guarantee Agency (CIGA) and Microgeneration Certification Scheme (MCS).

Regarding advice provision more generally, some organisations involved in the research are exploring applications for the **ASA Advice Quality Standard**, which is designed primarily for organisations which give 'social welfare and legal advice' (including housing and consumer rights). The standard is expecting to open consultation processes in the near future, where energy advice could be more explicitly considered.

Most organisations have organisational policies which must be followed in all provision. Many also have internal standards or service delivery agreements in place specifically for advice provision, such as an expectation to reply to queries within 10 days.

3.6 Funding, installer and wider policy landscape

Funding for retrofit is limited and changing funding streams are confusing for customers, and disruptive for the wider supply chain. Funding is somewhat of a 'postcode lottery' and this may be further complicated by forthcoming local authority decentralisation.

Additionally, with stop start funding, and eligibility restrictions for grants and financial support (such as incentives and subsidies), eligibility and background checking is an increasingly resource heavy task. It tends to fall to advisors but does not necessarily need to be part of an advisor's role.

There are currently not enough qualified trained and competent installers. This is especially true for heat pump installers, and it is common for heat pump installations to be oversized or otherwise problematic. Some installers have historically taken advantage of customers, further affecting wider consumer trust.

The wide variety of tools, tests, survey types and ways of presenting results can be overwhelming to the layperson. EPCs are a common assessment tool, but has well documented limitations. Wider changes in policy also affect the retrofit advice space, including Minimum Energy Efficiency Standards for rental properties, and Awaab's Law.

"We also place importance on independent advice and risk communication, including helping clients understand what not to do. . . Especially for traditional buildings, landlords and renovation projects where a ***compliance-only approach may miss practical risks****" Target CO2*

4. Community retrofit advice in the South West

4.1 The South West context

The South West region is recognised as having a strong community energy advice sector. There are a large number of active organisations, a wide range of retrofit services on offer, and provision available for different target audiences.

The scale of delivery (number of customers supported), geographical coverage, and the range of specific retrofit advice services provided by each organisation varies significantly, largely based on organisational capacity and availability of funding. Findings presented here are based on the research carried out during 2026, drawing on data from a survey for South West retrofit advice providers, an in person workshop, and follow up interviews. Participating organisations are listed in Appendix 1: Organisation summary and the approach is explained more fully in

Appendix 4: Research Methodology. There are also a greater number of organisations providing other elements of provision in terms of building awareness, normalising energy efficiency improvements and signposting into retrofit advice, which are absolutely crucial to widespread take up. However, this report is based on input from participating organisations, representing providers of, and experts in, retrofit advice.

Nine member organisations make up the South West Energy Advice Providers Forum (SWEAF), listed in Appendix 3: Membership of South West Energy Advice Providers Forum These organisations collectively support over 26,000 households a year and employ around 360 people. Energy and retrofit advice provision extends beyond this core group to a larger number of smaller organisations. With decades of experience providing advice, organisations (large and small) in the region have a strong history of collaborating with each other, as well as with local authorities, health services, supply chains and wider networks of support services and community actors.

The history of collaboration has contributed to raising of standards in the sector, strengthening the quality and consistency of operations and delivery and inputting into the design of publicly funded energy and retrofit advice programmes. There are definite benefits of advice provision delivered through this sector (as opposed to commercial services or in-house provision from energy companies, energy system operators or local authorities). These include the trust and impartiality of community organisations set up to re-invest profits and create social value; the value of local knowledge and local links, the ability to engage a wide audience and deliver personalised 'no closed door' advice.

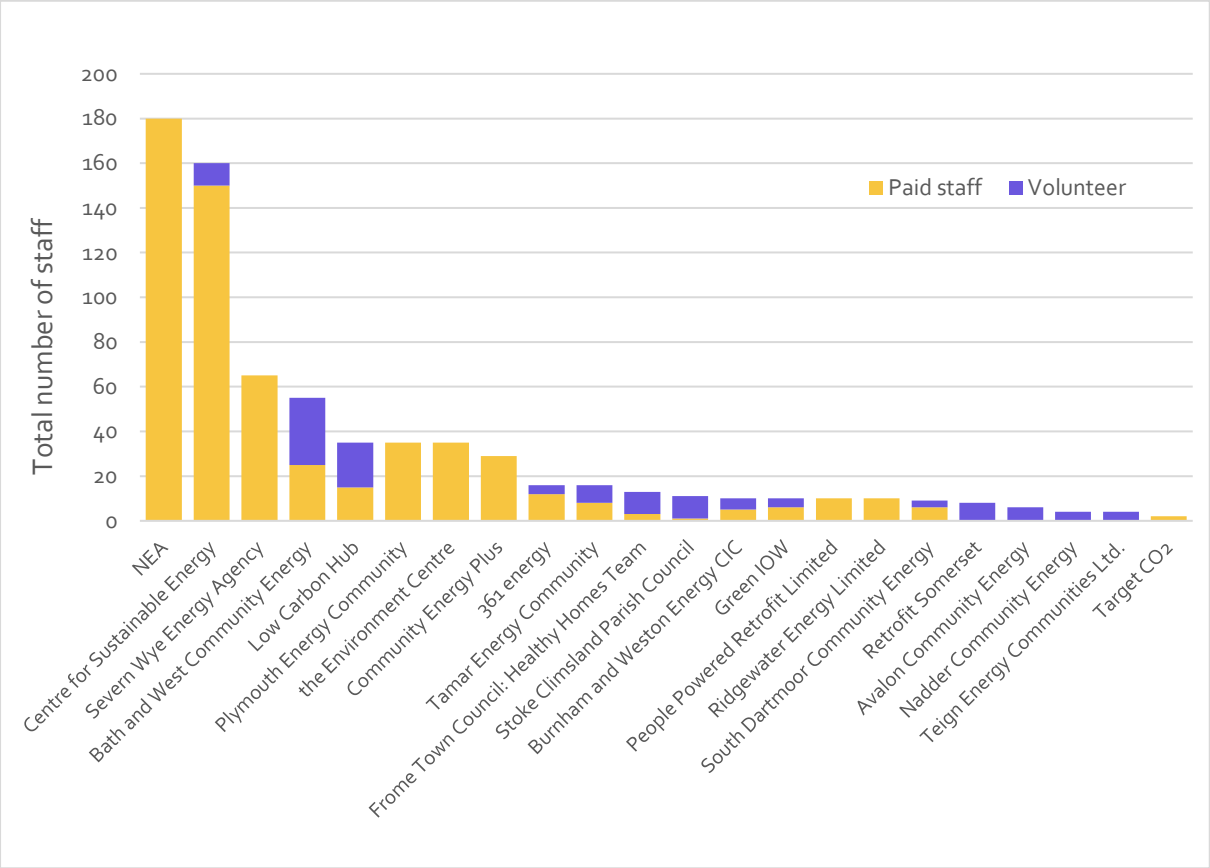
The consistent involvement of the South West Net Zero Hub in the region is a strength. The hub provides a secretariat function for the SWEAF. As a neutral convening body they are close enough to understand local delivery conditions, but sufficiently regional to join up fragmented schemes, funding streams and partnerships. There is no equivalent group in other regions, although there are other broader stakeholder forums including NEA's National Fuel Poverty Forums.

4.2 Overview of providers

Size of organisations

Of the 22 organisations surveyed, 14 (64%) had a combined staff team - including volunteers - of fewer than 20. Six organisations had teams of 30-65 staff, and two larger organisations had more than 150 staff. Six were completely, or almost completely, volunteer run1.

Organisation size

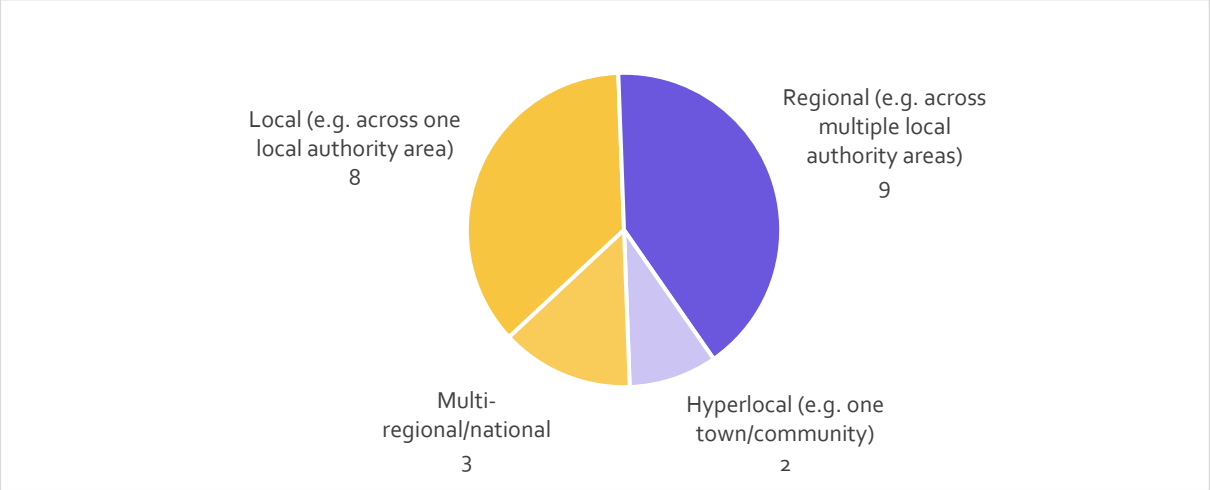


Geographical coverage

Survey responses demonstrated organisations operating at different scales of delivery. The majority provide services across one or more Local Authority area. A smaller number of organisations operate at the very local or at national or scale or across multiple regions.

[1] Note that these numbers represent number of staff rather than FTE, and that unless specified (e.g. Frome Council Health Homes Team) the numbers indicate total organisational size, and not staff specifically dedicated to advice projects or retrofit services.

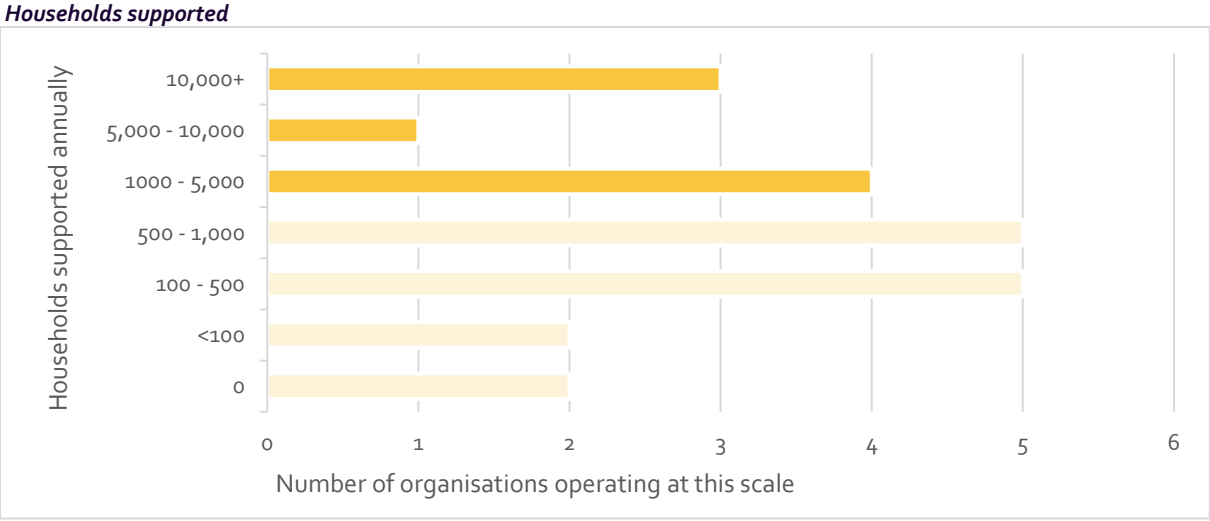
Geographical reach



Scale of advice provision

Thirteen South West advice organisations advise fewer than 1,000 households annually. Eight organisations reach more than 1,000 per year (and four of these reach over 5,000 households annually). Two organisations do not currently provide energy advice directly: Retrofit Somerset operate a directory website to find local retrofit contractors and have previously run green open home events, and Avalon Community Energy have provided small funds for retrofitting measures via a community benefit fund.

Households supported



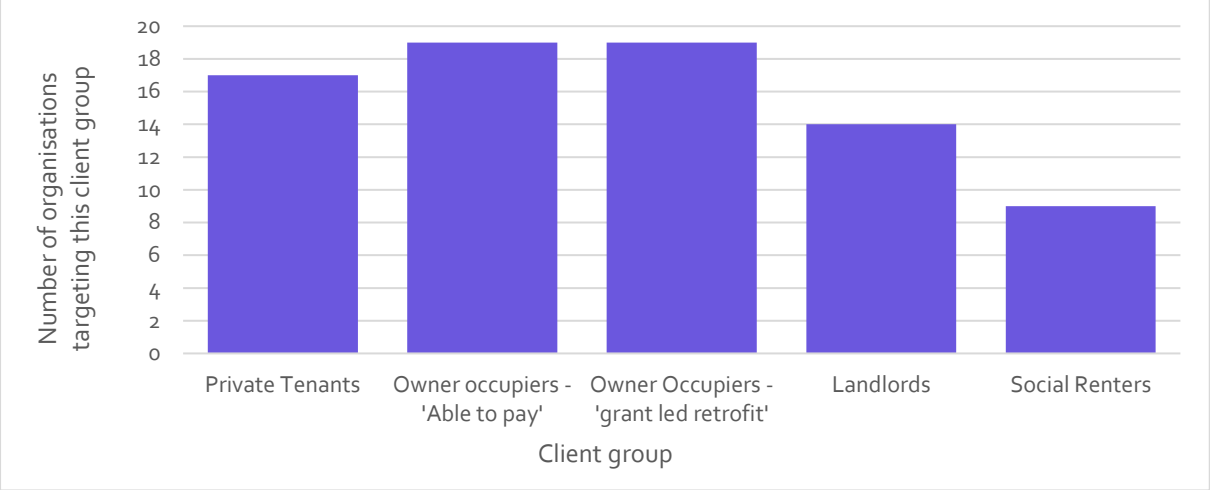
Target audience

There is a range of provision available across the sector for different audience types, but not all organisations support all audiences. The survey defined clients as falling into one of five categories: Private tenants; Owner occupiers ('Self-funded'); Owner occupiers ('grant led retrofit'); Landlords;

Social Renters). There were marginally more organisations targeting Private Tenants and Owner Occupiers than Landlords and Social Renters.

Most organisations have a focus on particular client group or groups – for example, Bath and West Community Energy and Teign Energy Communities solely target Self Funded Owner occupiers, and PPR specifically targets Self Funded Owner occupiers and Landlords. Five organisations indicated that they targeted all five client categories.

Number of organisations targeting different audience types for retrofit advice



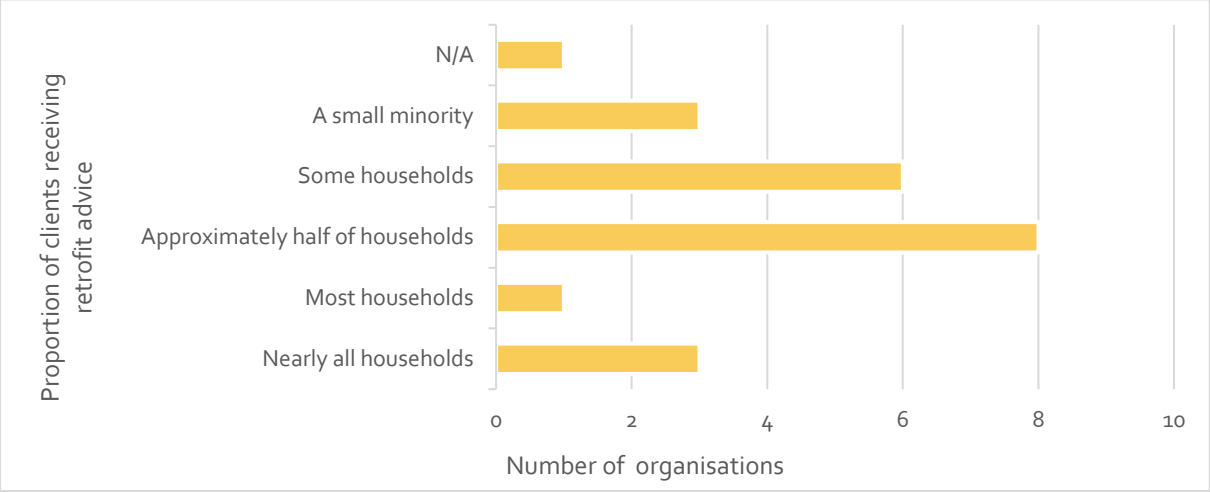
4.3 Overview of practices

A range of services are available in practice across the South West retrofit advice providers, including telephone advice, surveys and various assessments (including: whole house retrofit surveys, heat pump assessments, solar design, thermal imaging, heat loss surveys, ventilation checks, insulation surveys, U value measurement, damp and mould reports, DEAs and EPCs).

A large number of the (mainly smaller) organisations only provide services which are free to customers (organisational costs are covered through grants, other funding or services are delivered by volunteers). Most organisations offer a mixture of free and paid services to clients, with several having either a sliding scale on price or on the level of provision which can be accessed at no cost to the customer. The availability of funding through local and national schemes has a significant impact on the range and cost of retrofit advice provision available to customers.

Most of the organisations engaged through this research provide retrofit advice alongside other energy advice provision, and reported that clients move smoothly between different aspects of their service provision dependent on individual needs. 14 out of the 22 organisations surveyed provide retrofit advice for approximately half of their clients. Four organisations are primarily retrofit focused (Bath and West Community Energy; Burnham and Weston CIC; People Powered Retrofit and Tamar Energy Community).

Proportion of organisation's clients receiving retrofit advice



Methodologies being used

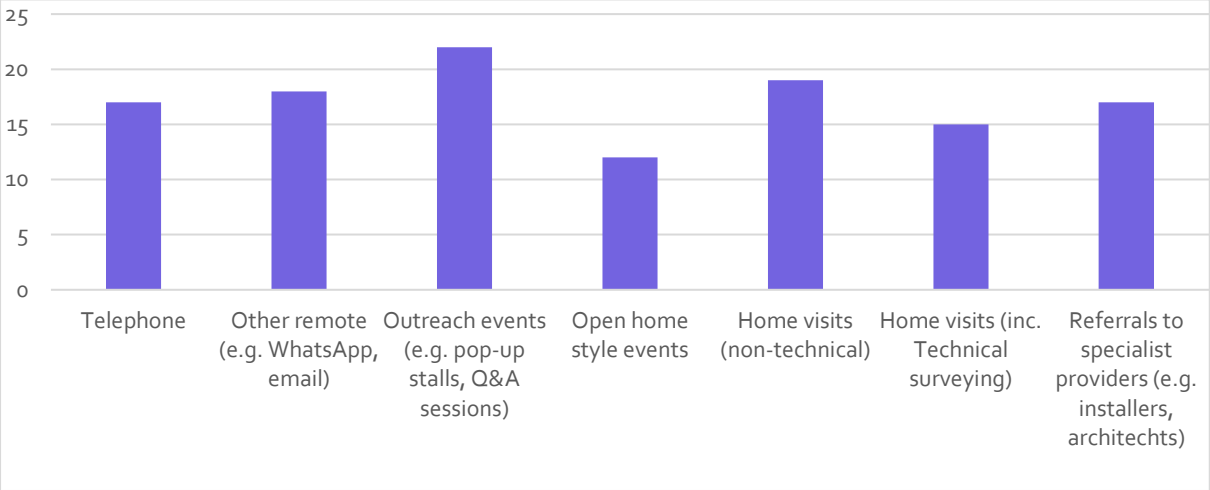
Retrofit advice is provided on a variety of topics to different levels of depth. Advice may be delivered across a range of methodologies/approaches, and a client may have multiple 'touchpoints' with an advice provider across their retrofit journey. Most of the methodologies for advice delivery are used by most organisations, although they use them for different proportions of their customers and have unique set ups.

Every organisation surveyed runs outreach events. Home visits, remote support, telephone advice and referrals are deployed extensively. Non-technical home visits are especially significant, with one fifth of organisations reaching more than 75% of their retrofit advice clients this way.

Telephone and remote support services offer opportunities for scale and cost efficiency, but home visits and open homes provide deeper engagement, trust building and support for retrofit decision making. Several remote advice methodologies are being trailed by different advice providers and have good potential to be explored and incorporated further in future.

The least frequently deployed approaches (i.e. not provided by the organisation, or only reaching <25% of their clients) are Open Home events, remote support, and home visits. More than a third of organisations (10 and 7 out of 22 respectively) do not do Open Home events or home visits. Five organisations do not provide a telephone advice service because of capacity limitations.

Number of organisations using different advice methodologies



While frequency of approach by advice providers is important, it does not account for the unique set up and service offerings of providers. Few organisations evenly deliver advice via all methodologies, and no organisations are evenly balanced in their client reach by methodology. Instead, organisations tend to specialise or deliver the majority of their provision in a particular area, for example home visits and technical surveying (Target CO2, People Powered Retrofit) or telephone support (Centre for Sustainable Energy, Severn Wye Energy Agency, and the Environment Centre).

Depth of provision

For simplicity, for a measure of the depth of advice provision our survey used simple categories: light touch advice, detailed advice, and detailed technical advice. There was a spread of delivery, with most organisations providing different levels. A few organisations however concentrate their support either on in depth advice (PPR and Target CO2), or only on very light touch provision (e.g. Burnham and Weston Energy and Stoke Climsland Parish Council).

The depth of provision is intrinsically linked to the length of time spent with a customer. The question of how long it takes to give retrofit advice in the community advice sector has been discussed, but given the range of provision it's very difficult to give an average customer contact time which represents the sector. Our survey included the question "On average, over their total customer journey, what amount of time is spent providing retrofit advice to a 'typical client'?" and twenty organisations responded. Seven organisations (35%) said more than 3 hours on average; ten (50%) indicated advice at between 1 and 3 hours, and three (15%) organisations indicated 30-60 minutes. These three were Target CO2, who are more exclusively a surveying organisation than an advice organisation, Avalon Community Energy whose support is focussed on funding for measures rather than advice provision, and Stoke Climsland Parish Council where provision is solely light touch advice. Note, the assumption is that this is contact time with the customer and does not include travel time, pre or post session administration or time spent writing up reports.

4.4 The customer journey

There is an overlap between retrofit and broader energy advice, with at least 70% of organisations engaged in this research having a parallel service offer (or established referral route) supporting clients with traditional energy advice (e.g. debt, supplier engagement). The pathways for supporting clients can go from the organisations retrofit services to energy advice services or vice versa dependent on client need and entry point.

Organisations taking part in the workshop produced example customer journey maps representing a typical customer journey through their retrofit service. Notably, every one was different, and every organisation noted that the customer journey varied depending on a number of factors (including but not limited to the customer's needs, access to finance or funding, time of year, access to tools and data, availability of installers, quality of installation). Some customer journeys loop between different aspects of retrofit advice provision (often with multiple interventions and follow ups), and some are quite stop-start. Just as there is not a one-size-fits-all advice methodology, there is also not a standardised customer journey, either within individual organisations, or across the sector.

However, it is possible to identify key touch points which feature in the typical retrofit journey:



This journey of advice is echoed by findings from the WoE LEAD project evaluation, which showed that multi-stage advice builds trust and confidence, nudges behaviour and overcomes barriers over time. There may be multiple stages of advice or different methodologies within any of the key touch points, for example both non-technical and technical support at planning stage, or post-install follow-up activities which cover satisfaction, planning for next steps, or efficiently using new technologies.

5. Methodologies used in retrofit advice

Seven key methodologies were identified as being used across the South West for community led retrofit advice. Outlines of each methodology are presented in this section. The methodologies are:

- Telephone advice
- Other remote advice
- Outreach events
- Open Home Events
- Home visits (non-technical)
- Technical home visits
- Community retrofit hubs / shopfronts

There are also a range of tools, models and diagnostic equipment used to support retrofit advice provision, with applications across multiple methodologies (outlined at the end of this section). Fuller discussion of the advantages, limitations, variations and best practice considerations of these methodologies is captured in *Appendix 5: Retrofit advice methodologies*.

Appendix 6: Comparing retrofit advice methodologies presents high level comparisons of the different methodologies, reinforcing that no single scalable (or low cost) approach delivers everything, and that customer journeys tend to be non-linear.

Telephone advice

Overview

Advice service provided by telephone. Typically used as an entry point into services, with multiple contact points through a client's journey. It can include triage, casework, follow-up support and referrals, and is commonly supported by desk-based tools and data sets (e.g. EPC; Solar feasibility software).

Typical time per client	5-60 mins (average 15 mins)
Advice depth	 Low-Medium
Reach	 Very high
Relative cost	**£**
Scalability	 High
Retrofit relevance	 Medium
Trust building	 Medium
Technical complexity	 Low
Advantages	Accessible; low cost and scalable; integration with systems and referral routes; ongoing support. Vulnerable consumers (older, infirm or digitally excluded) may be better served by home visits.
Limitations	Diverse enquiries mean advice, triage and sales boundaries can blur; limited understanding of property/circumstances; Difficult to verify information and paperwork.

Severy Wye Energy Agency (SWEA) Phone line funding to embed accessibility

Clients who access SWEA's retrofit support normally do so through the wider Warm & Well service, which acts as a trusted entry point for households in or at risk of fuel poverty.

Engagement often begins via SWEA's Adviceline, which takes referrals from partners such as the NHS, local authorities, and community organisations, as well as through outreach sessions in community settings.

From there, clients receive tailored energy advice and debt resolution support, and where appropriate, they go on to receive support through a more in-depth retrofit journey. That can include home visits, property-specific assessments, and referrals into grant-funded schemes.

This 'turnkey' service means clients move seamlessly between services, for example, from crisis support or advocacy into longer-term retrofit planning, ensuring that immediate needs are addressed while also enabling sustainable, energy efficient improvements to the home. Post installation support – such as tariff switching – is also provided.

Further reading:

- **severnwye.org.uk/advice-support**

Other remote advice

Overview

Advice delivered and/or data shared through remote channels including email, messaging platforms (e.g. WhatsApp), video calls and image-sharing. May allow for greater accuracy or detail when reviewing property specific information. Commonly supported by desk-based tools and data sets, including to translate images into property insights or reports.

Typical time per client	1-60+ mins (average 20 minutes)
Advice depth	 Low to High
Reach	 High
Relative cost	**£**
Scalability	 High
Retrofit relevance	 Medium-High
Trust building	 Medium-High
Technical complexity	 Medium
Advantages	No travel time; exchange of images/video can improve advice precision and build trust; reaches new audiences; software can aid analysis and reporting.
Limitations	Digital literacy and accessibility limitations; may still miss key detail on property/circumstances; additional expense.

CSE's online retrofit survey

Click to Retrofit is a pilot project currently subsidised by the Energy Industry Redress Scheme. Customers pay £60 for an affordable, high-quality retrofit surveys through an online platform, helping households access tailored home energy efficiency advice without the cost and inconvenience of a traditional in-person survey.

Householders use a smartphone/tablet to complete a guided survey with a qualified assessor. During the virtual walkthrough, images, measurements and information are collected on key features, including insulation, heating and ventilation systems. This enables the production of accurate, tailored retrofit recommendations without the need for a site visit (in most cases).

The service is designed to reduce cost and access barriers that can prevent households from seeking professional retrofit advice, particularly those who are self-funding improvements or living in harder-to-reach areas. Surveys are offered at a lower cost than conventional approaches through the use of remote delivery and streamlined processes. Quality assurance is embedded through a programme of on-site validation visits, while user experience and outcomes are monitored to understand effectiveness.

Click to Retrofit is delivered by CSE and Changeworks and draws on previous experience of lower-cost survey approaches. The pilot explores options for delivering impartial retrofit advice at scale.

Further reading:

www.futureproof.uk.net/service/online-retrofit-survey

Outreach Events

Overview

Energy and retrofit advice delivered in a community setting via events, drop-ins, pop-up stalls, expert talks, workshops or information sessions aimed at raising awareness, building trust and generating engagement with services.

Typical time per client	5-30 mins (+ travel, event set up and follow up administration/reporting time)
Advice depth	Low
Reach	High
Relative cost	**££**
Scalability	Medium
Retrofit relevance	Medium
Trust building	High
Technical complexity	Low
Advantages	High potential reach, including people who may not normally engage; Builds trust and visibility over time (including with partners).
Limitations	Difficult to provide tailored or detailed advice; Can be resource intensive with uncertain reach and impact.

Bath and West Community Energy's Workshops with Long Developed Partnerships

This service is for householders that aren't eligible for government grants, and delivers expert advice, energy assessments and post-assessment support in partnership with Retrofit West. There is a team of 5 experienced built environment professionals (all PAS 2035 qualified).

Householders consistently rank lack of knowledge as the second biggest barrier to retrofit, after lack of funding. In the Bath area there is the added challenge of listed, hard to treat homes.

The main way this service is promoted, and home energy upgrades more generally, is by using networks built up over 15 years to give talks and workshops across the district to groups such as resident's associations, parish councils, professional groups and eco groups.

With very little traditional marketing over 500 home visits have been carried out, with an average of 1.45 measures installed. Bath and West Community Energy's presence in these communities has also helped build support for work on community renewable energy development.

Learnings from this approach are that organising events and preparing presentations for someone else's event takes twice as long as you expect, and capturing interest at events with strong sign-up systems is key. Having a standard slide deck, and consistent presenter, can reduce the time overhead while sign-up postcards left on seats have higher uptake than traditional sign-up sheets.

Further Reading:

www.swnetzerohub.org.uk/wp-content/uploads/2025/03/Method-Community-Outreach.pdf

Open home events

Overview

Visits to real homes where householders share their experiences of retrofit measures, enabling people to see technologies and improvements in a trusted, lived environment.

Typical time per client	Range: 1-60+ minutes. Average: 18 minutes
Advice depth	Low-Medium
Reach	Low-Medium
Relative cost	**££**
Scalability	Medium
Retrofit relevance	High
Trust building	Very High
Technical complexity	Low-Medium
Advantages	Highly engaging and trust building, with strong client action potential; normalises retrofit conversations locally.
Limitations	Significant vetting and coordination required; insurance and safeguarding considerations.

Plymouth Energy Community – Green Open Homes

In 2025, Plymouth Green Open Homes invited residents to step inside retrofitted homes and see energy efficiency in action. It ran on a single Sunday, when twelve homes opened their doors to thirty visitors, from flats and terraced houses to pre-war and modern builds. Visiting other people's homes sparked conversation, built confidence and showed that almost any property can be retrofitted. Hosts were on hand to signpost anyone interested in retrofit to Plymouth Energy Community's retrofit services, helping visitors turn inspiration into action.

Driven by local campaign group Climate Action Plymouth, the idea grew out of the consultation on the city's Net Zero Action Plan, which had inspired residents to take action. It was led by Plymouth Practical Retrofit Exchange, a volunteer group of retrofit enthusiasts, in partnership with Climate Connections, Plymouth City Council and Plymouth Energy Community. The organisers drew inspiration from similar events in Bristol and Totnes.

A key learning has been to collaborate with groups and people willing to share their retrofit journey. The projects consistent partnership work with has been a real success, and has built into 2026 with this year's event running over two days, as part of Eco Open Homes Devon.

Further reading:

- climateconnectionsplymouth.co.uk/event/plymouth-green-open-homes/
- www.energysavingdevon.org.uk/open-eco-homes-devon/
- swnetzerohub.org.uk/wp-content/uploads/2025/03/Method-Not-Yet-Green-Open-Homes.pdf

Home visits (non-technical)

Overview

Home-based advice delivered without advanced surveying or diagnostic equipment. Advisors typically assess the home through observation, discussion with occupants, review of bills and heating systems, and identify practical energy-saving, maintenance and retrofit opportunities.

Typical time per client	30-60+ minutes (average c.61 minutes), plus travel time, follow up administration, reporting, referrals and casework.
Advice depth	Moderate to High
Reach	 Low-Medium
Relative cost	**£££**
Scalability	 Low-Medium
Retrofit relevance	 High
Trust building potential	 Very High
Technical complexity	 Low-Medium
Advantages	High trust building potential; Fuller insight into clients' property and circumstances, and wider support needs; can support 'quick-wins' (e.g. optimising heating controls; installing small measures).
Limitations	Travel is resource intensive; limitations for advising complex/large properties; limited access to organisational support systems; additional insurance and safeguarding risks.

CSE's Smart Energy Action Plans (SMEAPs)

CSE's qualified advisors offer Smart Energy Action Plans (SMEAPs) via telephone and home visits, providing tailored advice to help vulnerable customers understand the transitioning energy system, and their options. The SMEAPs idea grew from Smart & Fair research, which identified core "capabilities" customers require to navigate the energy system. SMEAPs provide comprehensive advice on technologies, tariffs and digital skills. For example, introducing smart plugs and phone apps for less mobile customers to control inaccessible devices.

Visits consistently support clients to make the most of technologies newly installed through funding schemes – notably optimising heat pump controls, and supporting those lacking digital skills to apply for the Smart Export Guarantee and gain confidence in monitoring their systems. SMEAPs advice also builds greater awareness of the smart energy market, allowing clients to think strategically about their energy use, validating decisions about home energy changes and increasing consideration of future home improvements such as batteries. 75% of clients surveyed said they plan to action at least one SMEAP recommendation.

Project learnings include: the need to provide simplified technical information, highly visual plans, extended post-visit support and guidance on regulations involved in the retrofit process.

Further reading:

- **www.cse.org.uk/news/helping-people-get-smarter-with-energy-smeaps/**
- **www.swnetzerohub.org.uk/wp-content/uploads/2025/03/Method-Home-Visits.pdf**

Technical home visits

Overview

Property visits using specialist surveying techniques, measurement equipment, diagnostic tools and modelling processes to provide technical information on building performance and retrofit options. Helpful for providing detailed evidence and technical confidence before significant retrofit investment. Especially important for 'complex properties'.

Typical time per client	30-60+ mins, plus travel time and follow up.
Advice depth	 High
Relative cost	**££££**
Scalability	 Low
Retrofit relevance	 Very High
Trust building potential	 High
Technical complexity	 Very High
Advantages	In-depth, accurate information for decision making; potential for overlap with installers and wider retrofit ecosystem.
Limitations	Specialist and expensive; can be overwhelming for clients; risk of inappropriate use of tools; risk of duplication with installer actions; other limitations of non technical home visits (above)

Green Isle of Wight, heat loss assessments and the Boiler Upgrade Scheme

One of Green IOW's services involves completing the heat-loss calculations necessary to accurately size a heat pump. Heat-loss calculations are considered part of the wider total cost of having a heat pump installed and are therefore eligible costs under the government's Boiler Upgrade Scheme. In most retrofit scenarios calculations are completed in-house by installers, however, Green IOW's have developed strong relationships with local installers who trust them to complete the calculations. Charging £300 (+VAT) for this service enables Green IOW to provide a financially sustainable service, with surplus revenue supporting its fuel poverty work.

Close working partnerships means Green IOW's advice clients are connected to installers, and installers' clients are connected to Green IOW. Residents can ask Green IOW's team questions and understand how heating, insulation and ventilation work together, with Green IOW completing modelling work at no extra cost, showing how other measures can reduce their heat loss and the size of heat pump needed. The installer advisor partnership addresses a common gap between advice and the technical information needed to practically plan work.

A key learning has been to allow sufficient time for on-site surveys and technical reports, and account for hidden costs such as software licence fees and staff accreditation. Green IOW recommends that other community organisations establish clear responsibilities with installer partners, explain the scope of each visit and provide accessible follow-up advice.

Further reading:

- **www.retrofit.coop/blog/taking-a-look-at-the-retrofit-assessments-landscape**

Community retrofit hubs / shopfronts

Overview

A permanent or semi-permanent physical location where residents can access energy advice and retrofit support. Beyond direct advice provision, hubs have the potential for wider community activities and workshops, fitting into and advancing the wider retrofit support ecosystem.

Typical time per client	Varies
Advice depth	Variable
Relative cost	**£££**
Scalability	 Medium
Retrofit relevance	 Medium-High
Trust building	 Very High
Technical complexity	Variable
Advantages	Accessible, trust building presence; high potential reach; ease of checking paperwork; opportunities for co-benefits such as storage, hosting events and training, partner collaboration.
Limitations	Significant running costs; location can limit reach/audience; requires long-term funding; likely more suited to grant-funded clients.

National Energy Action's (NEA) Community Retrofit Hubs

Three Hubs in Sheffield, Burnley and Oldham addressed low retrofit awareness, mistrust of schemes and installers, and practical barriers faced by fuel-poor and vulnerable households: residents who found the retrofit journey complex and lacked impartial guidance.

Advisors had small offices based in local community centres which had high footfall and the ability to host larger scale information events. This allowed the delivery of weekly drop-ins and attendance at local events, as well as a base for completing home visits and one-to-one casework whilst remaining available for further support as needed. The teams offered independent retrofit and energy advice, supported access to funding, liaised with installers and provided ongoing support before, during and after retrofit works. Over 2 years, the Hubs supported almost 5,000 households with advice and guidance and helped more than 1,400 households progress retrofit improvements. Residents reported warmer, healthier homes, greater confidence in retrofit technologies and improved energy affordability. The community-based approach, daily presence and visibility generated strong word-of-mouth referrals and long-term trust and relationships.

A key lesson was that trust takes time to build and is most effective when delivered through a consistent local presence and strong community partnerships. While recruitment initially prioritised practical experience in energy efficiency and retrofit, team members later completed Level 5 Retrofit Coordinator qualifications and found this knowledge invaluable. In hindsight, having this level of technical expertise from the outset would have strengthened delivery.

Tools

Whist not a methodology per se, a range of tools (both physical and data based) can be used to improve retrofit advice provision. They can be broadly divided into three categories: diagnostic equipment, modelling software, and single measure feasibility tools. Use of tools and modelling is particularly relevant to the more technical aspects of retrofit advice. The lists below set out the tools mentioned by South West community retrofit advice providers engaged in this research as being actively used for, or having potential to benefit, retrofit advice.

Diagnostic equipment can be used alone or collectively for measurements and monitoring which help inform better recommendations. Where there is a visual output (e.g. thermal imaging displays from heat loss surveys) tools can be used to help explain the cause of problems and benefits of retrofit solutions. More examples of how diagnostic equipment is used to support retrofit advice are outlined in the WoE LEAD project evaluation[2].

Diagnostic equipment	
• Infrared thermometer • Thermal imaging cameras • Heat loss/Heat flux sensors • Air Tightness equipment (Blower door or Pulse testing) • Smoke Pencils • Anemometer	• Borescope • Air quality monitors • Hygrometer/Thermo-hygrometer (Humidity meters) • Moisture meter • Laser measure
Modelling, plan and report generation	
• Online self-assessment plan builder (e.g. Centre for Energy Equalities' Fairer Warmth; Centre for Sustainable Energy's Energy Choices Tool)	
• Automated/AI driven property survey reports (e.g. Survey Sphere)	
• Detailed whole house modelling and options appraisal software (e.g. People Powered Retrofit's Home Retrofit Planner)	
Single measure feasibility	
• Solar feasibility software (e.g. Solar Wizard; Easy PV)	
• Heat pump design software (e.g. Spruce; Heat Punk; John Cantor's Calculators & simulators)	
• Specification library for common measures	
Other tools	
• Transcription tools (e.g. for recording telephone advice calls, with the potential to incorporate AI for reporting) • Online postcode look ups, satellite imagery, EPC register • AI 'Chatbots' to assist advisors with system and topic navigation, and triage.	

[2] www.swnetzerohub.org.uk/wp-content/uploads/2025/03/Method-Visual-and-Data-Tools.pdf

Various assessment and modelling tools are being used across the sector to good effect. These include People Powered Retrofit's Home Retrofit Planner and Centre for Sustainable Energy's Energy Choices Tool. Workshop participants noted however that additional checks, input or exploration is often needed for a fuller understanding of the building (and therefore better advice on improvements). That can include use of single measure feasibility software for assessments of specific improvements and their suitability in a given property. Some models generate outputs remotely based on data inputted by the user (i.e. without the need to be on site), but the more detailed models are used as part of a home visit. For greater accuracy data they may also use - or be combined with - collected at the property (using diagnostic equipment).

Other more generic tools are also being used to support retrofit advice, such as transcription tools and chatbots for triage, which can improve efficiency and have potential for improving services for vulnerable customers.

6. Learnings on ensuring 'effective' retrofit advice

The methodologies discussed in the previous section and the more detailed descriptions in Appendix 5 contain considerations for best practice specific for each approach. However, as part of the research, general principles and factors which ensure retrofit advice is 'effective' and achieves its aims were considered. Our survey asked:

"In your own words, please share what 'effective' retrofit advice means to you? This could be a selection of key words, or a sentence. If you use any existing impact measurement metrics, this would be helpful to include."

The answers reflected 'effectiveness' from both a method of advice delivery perspective (e.g. clear communication, accuracy, use of appropriate tools) and an outcome perspective. Outcomes were both pragmatic (e.g. measures installed; bills reduced) and personal (e.g. confidence built; smooth journey).

6.1 Effective methods of advice delivery

Survey respondents fed back that advice should be accurate, up-to-date, detailed and technically informed (to an appropriate level of detail), while being tailored to the householder, using clear communication and busting myths. Advice must recognise that people are at different starting points and take into account the full picture of the home and client's circumstances, including their motivations, health and other potential co-benefits. Recommendations should be realistic and achievable. Advisors need to be able to build trust, be independent have a good level of experience, and it helps if they have local links. If appropriate advice should include installer liaison and financial support. Tools and measurement should be used appropriately to enhance advice.

Effectiveness involves being available and approachable for multiple interactions along a customer's journey, ideally with the same advisor for continuity. Effective advice delivery often needs 'wrap around support' or 'hand holding', (e.g. to support behaviour change, or understanding newly installed technologies), ideally until a problem is resolved and with clear and quick referral routes.

"Effective retrofit advice is person-centred, whole-house and genuinely usable for the client, meaning it starts with an understanding of the household's needs and circumstances and translates technical information into clear, practical steps they can act on. *It combines a robust assessment of the property with guidance that is safe, well-sequenced and aligned with standards such as PAS 2035, while also helping clients understand risks and what not to do. Critically, it is delivered in a way that builds trust through independence, enabling people to make informed decisions with confidence and supporting smooth delivery with installers." Severn Wye Energy Agency*

6.2 Outcomes of effective advice

a) Pragmatic/'Hard' outcomes

Answers which explored practical, more measurable, outcomes mentioned number and type of measures installed, an overall improved energy performance and reduced costs, a healthier more comfortable home with better air quality, with less damp, and mould removed. Co-benefits e.g. related to a client's health were also included.

*"**Advice that provides the right level of information for the context and person receiving it and enables them to take action on retrofit in their home and achieve their desired outcomes** (whilst protecting occupant and building health and, where appropriate and possible, reducing carbon emissions). This can be anything from forming a plan that is implemented piecemeal over years, to feeling confident enough to proceed with a heat pump or PV panels, to doing some DIY draughtproofing, to carrying out a big whole house retrofit." People Powered Retrofit*

b) Personal/'soft' outcomes

Answers which explored personal, less measurable, outcomes of advice mentioned that clients would be well informed and better educated on energy usage and measures. Clients would be aware of their choices and ultimately have an improved overall confidence, an informed plan and ability to take action/next steps in the right order. This would include an awareness of the risks of different actions, actions not to take, the role of behaviour change and the ability use new technologies/measures.

"Effective retrofit advice is often not just about individual interventions, but understanding how measures interact" Target CO_2

6.3 Tracking outcomes

Retrofit is often a multi year journey, and funding does not generally provide for post-advice monitoring work, therefore tracking of certain outcomes is generally seen as a challenge, and varies across organisations. Unless on a clear pathway, such as grant scheme, it is difficult to track the impact of advice on a client's actions/circumstances.

That said, respondents indicated various metrics which they use or would like to use, for tracking outcomes. These are shown in the table below. The case study (below) on Frome Town Council's Multi-Year Evaluation of Retrofit Support describes a pilot project to carry out follow up tracking and offer additional support two years after initial retrofit advice provision. It demonstrates that retrofit outcomes often do take several years to realise, and that follow on support is beneficial to the majority (in this case, 72%) of customers.

Table grouping types of retrofit outcomes

Pragmatic / hard outcomes	Personal / soft outcomes	Other aspects
• Modelled financial savings • Modelled bill savings • Modelled carbon reduction • Number and type of measures installed • Progression rates from advice into retrofit • Funding secured for households • Grant schemes accessed • Referral sources/referral pathways (including to local companies) • Engagement figures • Number of home visits • PAS 2035 quality and compliance indicators	• Self-reported outcomes (e.g. thermal comfort, damp reduction, wellbeing, confidence) • Households attempting retrofit – and if alone or with support • Measures decided against • Perceived barriers • Clients' experiences of their retrofitting journeys	• Recommendations of local contractors/installers • Health-related outcomes • How measures were funded (e.g. different grants; loans; self-funded) • Measures investigated/planned (not yet completed, or dismissed) • Why advice was not progressed

6.4 Importance of skills and training

Delivering effective retrofit advice requires a combination of technical expertise, interpersonal skills and local knowledge.

Advisors need to understand energy efficiency measures and emerging technologies, alongside building performance, damp and mould, and fuel poverty. They need an awareness of local conditions (e.g. weather, building types and materials) and local provision (installers, partnerships, sources of support). At the same time, they also need the 'soft skills' to be able to communicate clearly, build trust, and understand how best to support households with diverse needs and vulnerabilities. And, as retrofit policy, technologies and funding schemes continue to evolve, advisors must keep pace with changing grant and finance schemes, regulations, products and local delivery contexts.

The research found that organisations place a strong emphasis on communication skills, energy efficiency knowledge, and understanding fuel poverty, vulnerability, damp and mould. However, expectations vary significantly between organisations, reflecting the absence of a consistent definition of advisor competence across the sector. While a wide range of accredited qualifications and training courses exist, no single qualification or training provision provides all the knowledge and skills required for high-quality retrofit advice.

Stakeholders consistently highlighted the importance of ongoing learning and support beyond formal retrofit qualifications. There is recognition of the value of combining accredited retrofit

training with additional training, mentoring, supervised practice, peer learning, communities of practice and continuous professional development (CPD). When advisers can draw on wider organisational expertise it improves their practice, recognising that no individual can maintain specialist knowledge across every aspect of retrofit, building performance and customer support.

The research identified gaps in the current training landscape, explored more fully in Annex A. If advisors are poorly trained or do not have a full enough understanding on which to base recommendations, they may inadvertently give poor or inappropriate advice, which can lead to negative consequences of retrofit actions. Existing retrofit qualifications often focus on assessment methodologies rather than practical understanding of buildings, retrofit risks, customer decision-making and communication. Important topics such as building physics, traditional buildings, moisture and ventilation, smart energy systems, climate resilience and fuel poverty are not covered consistently. This creates risks that advice can become overly simplified, outdated or influenced by individual areas of expertise. Strengthening sector-wide competency standards, supporting multidisciplinary learning, and ensuring access to ongoing CPD and specialist support would help improve advice quality and reduce these risks.

The sector would benefit from competency frameworks that clearly set out (and identify routes to) technical knowledge requirements, customer support skills and continual professional development needs. Strengthening training (in particular more robust entry level training) and standardising expectations, while recognising and promoting access to more specialist expertise and peer learning would help ensure households receive more effective, consistent and high-quality retrofit advice.

6.5 CPD Case Studies

CSE's onboarding of Energy Advisors
At CSE newly recruited energy advisors will be a 'trainee energy advisor' for the first 6 months in role. They will have approximately 30 blocks of 3 hours to shadow calls by experienced advisors and will discuss their learning with a mentor and a line manager. This is alongside completion of their initial City & Guilds qualification. Monthly knowledge share sessions are also hosted as 'deep dives' for the whole team, delivered by an experienced advisor on a particular topic of need, as flagged in whole team conversations. Experienced advisors who show an interest in smart energy topics are moved into a dedicated team which supports clients with Smart Energy Action Plans, where they receive tailored 'deep dives' on smart energy topics.

Peer learning opportunities
The South West Energy Advice Providers Forum (SWEAF) operates to share learnings and shape delivery on a strategic level. Other peer learning opportunities are more focused on supporting advisors, such as a South West Energy Advisors and Caseworker Forum (hosted by CSE, 1st Friday of the month); the national Energy Advisors Support Network (hosted by CSE, twice monthly); People Powered Retrofit's Community of Practice which is more owner-occupier focused; and regional AECB members host occasional meet ups to discuss retrofit implementation and also host a directory of members.

6.6 Case study: evaluation of retrofit support

Frome Town Council's Multi-Year Evaluation of Retrofit Support

The 3 year Healthy Homes: Retrofit programme, developed as part of Green and Healthy Frome was delivered by Frome Town Council (FTC) in partnership with the Centre for Sustainable Energy (CSE) and Community Energy England (CEE).

Homeowners (mostly self-funded) were initially offered a whole-house retrofit assessment, to identify potential measures and their estimated impacts on energy use, costs, carbon, warmth and comfort. As the programme developed, it was clear that receiving a report was not always enough to enable action, and sometimes seen as too complicated. To address this, additional householder support beyond the point of receiving advice was brought in: shorter, easy to understand reports, short-term follow-up advice, and longer-term support.

Knowing that retrofit journeys can take years and are affected by cost, confidence, disruption, planning constraints and access to trusted contractors. FTC aimed to understand whether advice was helping people make informed decisions and take action. Households were contacted around two years after their initial retrofit report. A structured monitoring process was developed to capture outcomes. Before each follow up, information from the original retrofit assessment was pre-populated into a Microsoft Form. During the visit, staff updated this, recording which measures had been completed, were underway, needed support, or had been declined, plus measures undertaken independently, barriers encountered, contractors used, and grants accessed.

This information was transferred into a monitoring spreadsheet to analyse across households, identify common themes and develop case studies. Households received in-depth notes, advice and suggested next steps, and contractor information was added to a signposting database. Households were also invited to join a WhatsApp group, solar/ASHP newsletter, create a CEE Fairer Warmth account and become Neighbourhood Retrofit Ambassadors.

In a study of 36 households contacted after 2 yrs, 72% wanted continued support. Of the 26 households receiving ongoing support, 273 measures were recommended, 17% of recommended measures had been completed, 49% were in progress, 36% of recommended measures needed more support. Another 40 extra measures were being worked on that hadn't been included in the original home energy plan. The estimated average annual saving so far was £414 per household, with an estimated average annual carbon saving of 0.66 tonnes CO_2e per household.

The project demonstrated that effective retrofit advice is a journey rather than a single intervention. The follow ups provided an opportunity to understand what advice had translated into action and what barriers remained. Recording measures undertaken independently was also important, as households sometimes make progress without direct project support. The ongoing project currently under the FTC Resilience Team aims to track outcomes and offer support over even longer periods, improve the evaluation of the data, and build a stronger evidence base on the longer-term impact of retrofit advice.

Further Reading:

- https://greenhealthyfrome.org/our-learnings/
- https://greenhealthyfrome.org/download/8869/?tmstv=1779964380

7. Added value of community sector provision

In survey results, workshop sessions and follow up discussions, a wide range of benefits of working with the community sector for retrofit advice have been flagged. They include:

Impartiality

The impartiality of community retrofit advice means clients are more likely to trust recommendations, knowing that advice is from a non profit organisation, not someone on commission. Trust and impartiality were consistently named in our research as the foundation for providing effective retrofit advice.

"Households need advice that is trusted and not shaped by commercial incentives, product sales or installer preferences. That independence is a major strength of the sector and something local authorities should recognise and protect." Bath and West Community Energy

Trust

Beyond the intrinsic trust gained by having non-profit status, when those providing advice are frequently also residents or representatives of a community (often working from already trusted venues), it makes them more approachable and helps develop rapport with customers.

The benefits of the trusted local relationship are hard to quantify, but have an influence on the whole retrofit journey, from higher engagement and feeling they have received balanced advice for their needs, through to taking up recommendations, and having confidence in transparency quality assurance processes.

"For local authorities, the key message is that retrofit is not just a technical exercise, it is a people-led process. Programmes are most effective when they are rooted in trusted local delivery, with strong advice services acting as the front door and ongoing support throughout the journey." Severn Wye Energy Agency

Local links and knowledge

Community sector retrofit advice providers embedded in their local area are knowledgeable about their area's needs (for both property and people) and are embedded in wider community partnerships. Being locally based enhances the quality of advice provided, as the deep knowledge of local context helps address the needs of person (e.g. cultural context) and property (e.g. building ages and types, areas of subsidence, exposure zones climate, people, planning context, conservation areas).

Normalising retrofit

Community energy organisations are often better able to put their finger on the pulse with the right narratives, messaging and messengers for the area they operate, to stimulate conversations which gradually build trust in new technologies. Advice from trusted bodies helps to reinforce central government's wider initiatives. And trusted local voices can help to overcome instances of previous scheme or individual property failures, and to build a positive image.

Personalised advice

Retrofitting properties is complex, and clients have a need to navigate vast, broad and potentially confusing energy efficiency options. A focus on whole house planning that fits with the client's needs and objectives, not just single measure delivery targets is necessary. Community energy organisations give advice which is personalised to the needs of the individual person and property, not driven by single measure roll out, or schemes focussed on the highest margins. Ultimately that means better planned, more successful installations with fewer unintended consequences.

Ongoing support

Importantly, CEOs commonly offer multiple services and advice provision methodologies, meaning that clients might engage multiple times and move through a 'retrofit journey'. Returning to an organisation for various stages of advice. For example, from awareness raising, to measure planning, to troubleshooting usage of new technologies, or setting up new tariffs. It is a common complaint that commercial installers do not provide sufficient handovers for clients to confidently operate newly equipped technologies.

Having an ability to access ongoing support builds confidence and helps to avoid mistakes and pitfalls in the retrofit journey, ultimately leading to willingness to engage and install measures. For example, giving clients the confidence to navigate grant and contractor landscapes, with clear explanation of quality control processes and guarantees, when there is fear of being taken advantage of.

The need for ongoing support and education is especially apparent after technologies have been installed. Allowing clients to gain the financial benefits of effective operation, smart tariffs, the Smart Export Guarantee.

"Online, call centre, surface level advice helps people to learn about retrofit and might build their interest and knowledge. To invest, people's confidence of outcome needs to be built and that requires advice, and the knowledge that you can access ongoing support during the process." Plymouth Energy Community

Meeting local needs

There is variation in audiences for retrofit advice, and different audiences have different motivations and capacity to engage. Community Energy Organisations, especially those with a fuel poverty advice background, are often better able to understand the realities of different budgets or challenges households face (e.g. health conditions, digital exclusion or language barriers).

"Clients may have an interest in fuel poverty, or decarbonisation but rarely both, so it helps to meet the needs of both ends of the scale when you can talk through concerns, offer real solutions and help see them through to completion." Severn Wye Energy Agency

Reaching hard-to-engage households

Community based organisations commonly deliver their services, such as telephone support or home visits, for free to the client. For those not eligible for free service delivery, engagement activities provide freely available advice, signposting or triaging and are often sited at existing community events and venues used by people less likely to actively seek retrofit advice.

In this way, combined with the trust and reputation of being non-profit and locally based, community organisations interact with members of society who may be vulnerable or unlikely to trust, or unfamiliar with, other support services. Topics such as energy bills or cold, damp, mouldy homes are starting points for conversations. Once a client has been engaged around these topics and service delivery initiated it is not uncommon to gain insight into the wider circumstances of a client and opportunities for retrofit improvements to their homes. Advice services can act as the 'front door' for ongoing support.

"Opportunities for retrofit measures / actions are often identified through fuel poverty/energy advice visits" 361 Energy

Enabling cross-referrals

Community energy organisations are well positioned with existing relationships and referral routes between wider local services from local authorities to debt support to age focused organisations. Some community energy organisations have developed data sharing agreements to work in formal partnership with health, housing or planning teams. Where formal partnerships don't exist, the soft relationships are still a great source for promotion of services. Enabling a reach not possible from commercial organisations. Existing links to the local services ecosystem has existing value for customer outcomes, and future potential for better coordination of - and engagement with - area based approaches to retrofit.

Social and public value outcomes

Part of the reason that community energy organisations provide a different service to those driven by commercial interests (ultimately seeking profit) is that their aims are different. They are set up to achieve social and public value outcomes, recognising retrofit co-benefits for consumers (such as stress reduction, comfort and health), the local economy (jobs and skills opportunities), and community resilience (reducing risks of overheating, fuel poverty).

Appendices

Appendix 1	• Summary of participating organisations
Appendix 2	• Delivery partners
Appendix 3	• SWEAF members
Appendix 4	• Research methodology
Appendix 5	• Retrofit advice methodologies (expanded)
Appendix 6	• Comparison of different retrofit advice methodologies

Appendix 1: Organisation summary

This table lists the community based retrofit advice organisations across the South West which provided data, input and feedback through surveys, conversations and workshop participation, and on which this report is based.

Organisation name	Legal structure	Areas covered	Geographic reach	Survey completed	Workshop attendance
361 energy	Charity	Northern Devon	Regional	Y	Y
Avalon Community Energy	Community Benefit Society	Somerset	Local	Y	N
Bath and West Community Energy	Community Benefit Society	Bath and North East Somerset	Local	Y	Y
Burnham and Weston Energy CIC	Community Interest Company	Somerset, North Somerset	Regional	Y	Y
Centre for Sustainable Energy	Charity	National	Multi-regional/National	Y	Y
Community Energy Plus	Charity	Cornwall	Regional	Y	Y
ECOE Advice	Charity	Exeter, Mid Devon, Torbay, East Devon, Teignbridge	Regional	N	Y
Fal Energy Partnership	Registered society	Falmouth (Cornwall)	Hyperlocal	N	Y
Frome Town Council	Town Council	Frome	Hyperlocal	Y	Y
Green IOW	Community Interest Company	Isle of Wight	Local	Y	Y
Low Carbon Hub	Community Interest Company	Not South West	Regional	Y	Y

Nadder Community Energy Warmer at Home	Charity	Nadder Valley (Wiltshire)	Hyperlocal	N	Y
NEA	Community Benefit Society	National	Multi-regional/National	Y	Y
People Powered Retrofit Limited	Charity	Not South West	Multi-regional/National	Y	Y
Plymouth Energy Community	Community Benefit Society	Plymouth	Local	Y	Y
Retrofit Somerset	Collaboration	Somerset	Local	Y	Y
Retrofit West	Community Interest Company	WECA	Regional	Y	N
Ridgewater Energy Limited	Limited Company	Dorset	Regional	N	Y
Severn Wye Energy Agency	Charity	Gloucestershire, South Gloucestershire, Herefordshire, west Wales	Regional	Y	N
South Dartmoor Community Energy	Community Interest Company	South Hams (Devon)	Local	Y	Y
Stoke Climsland Parish Council	Local government	Stoke Climsland (Cornwall)	Local	Y	Y
Tamar Energy Community	Community Benefit Society	West Devon	Regional	Y	N
Target CO_2	Unincorporated	Devon, Cornwall, Somerset	Regional	Y	Y
Teign Energy Communities Ltd.	Community Benefit Society	Teignbridge	Local	Y	Y
The CHEESE Project	Community Interest Company	Bristol	Local	Y	N
the Environment Centre	Charity	Hampshire	Regional	N	Y
The MCS Foundation	Charity	National	Multi-regional/National	Y	Y
National Retrofit Hub	Community Interest Company	National	National	N - Interview	N - Interviewed

Appendix 2: Delivery partners

This project was led by the Centre for Sustainable Energy (CSE). The core project delivery team (Core Team) was a multi partner group incorporating CSE, Severn Wye Energy Agency (SWEA) and Plymouth Energy Community (PEC), the South West Net Zero Hub (SWNZH) and volunteer members of the South West Energy Advisors Forum (SWEAF).

CSE, Severn Wye Energy Agency and Plymouth Energy Community are all members of the SWEAF: a strong diverse group of South West based not for profit / charitable energy advice organisations with decades of combined experience of delivering energy and retrofit advice to their local communities. SWEAF's primary focus is to use the collective knowledge and expertise of members to help inform future publicly funded energy and energy advice and retrofit programmes.

Appendix 3: Membership of South West Energy Advice Providers Forum

- **Bath & West Community Energy** (Bath & North East Somerset and surrounding area)
- **Centre for Sustainable Energy (CSE)** (Bristol, Somerset and Wiltshire)
- **Community Energy Plus** (Cornwall)
- **Plymouth Energy Community** (Plymouth and wider Devon)
- **Ridgewater Energy** (Dorset)
- **Severn Wye Energy Agency** (Gloucestershire and surrounding areas)
- **Sustainable Community Solutions (trading as ECOE Advice)** (Devon)
- **The Environment Centre (tEC)** (Hampshire, Southampton and Portsmouth)
- **Green Isle of Wight** (Green Isle of Wight / Southampton)

The Forum is convened through the **South West Net Zero Hub,** which acts as the secretariat and coordinating body for the network.

Appendix 4: Research Methodology

Overview

The research was carried out using a combination of approaches to explore and analyse current advice methodologies, job roles, training requirements, skills, and standardisation in retrofit advice. The methodology combined:

- Desk based research was undertaken using a combination of human and AI research, based on a CSE model specifically developed to efficiently extract data from specified sources.
- Analysis of data from a survey for South West retrofit advice providers (developed by CSE in conjunction with Plymouth Energy Community, Severn Wye Energy Agency and South West Net Zero Hub and disseminated to relevant stakeholders)
- In person workshop exploring and discussion approaches
- Targeted interviews and gap-filling research

Each stage was planned and delivered with input from South West Net Zero Hub and the project partners (Plymouth Energy Community and Severn Wye Energy Agency).

Scope

This research focussed specifically on provision of domestic retrofit advice by community based organisations in the South West.

There is a distinction to be made between retrofit advice and wider energy advice provision (such as debt resolution, income maximisation and supplier engagement work).

The report does not look at non-domestic advice, generic information provision, fuel poverty advice, train-the-trainer provision, 'advice by proxy' (e.g. via community groups or champions), or approaches to area/street-based retrofit.

Approaches to market segmentation are also not addressed in this study, although it came to light that several organisations (e.g. Bath and West Community Energy and Plymouth Energy Community) use segmentation approaches to help understand the 'readiness to act' and the suitability of different methodologies for different audience types.

A range of customer types were considered in the research, including homeowners, housing association and private tenants, and HMOs. The terms 'Able to pay' and 'Self-funded' are often used interchangeably, in this report we have used 'Self-funded' to describe retrofit advice target audiences who do not qualify for grant funded schemes and in theory have the means to pay directly for making energy efficiency improvements to their homes.

In terms of advisor skills and qualifications, and provision of retrofit training, research was focussed on identifying relevant qualifications, core training needs of advisors, opportunities for sharing best practice, and recommendations for sector wide improvements. The research does not look into specific training providers or assess quality of training provision. Topics for ongoing CPD are explored at a high level, alongside the expectations of organisations for their advisors and the current practices of in-house team development.

The PAS2035 framework, and the associated roles named in this framework are considered as part of the broader discussion on qualifications. PAS2035 is discussed in section 2.1. Wider context.

Framework

Energy advice refers to person-centred, two-way guidance that helps a household improve the energy efficiency, comfort and affordability of their home. There is a wide spectrum from immediate, practical support through to specialist, technical and whole-home retrofit advice, including ongoing support to understand, plan and act on low-carbon technologies.

This research focussed specifically on retrofit advice, using a framework which recognizes that retrofit advice provision is highly context specific, responding to the customer (including their circumstances and readiness to act). Dependent on the client need, property and circumstances, advice can cover a range of topics. For example, grants (availability, eligibility and delivery mechanisms), fabric measures, tariffs, or 'smart technologies'. Each topic can also be covered to varying depths, ranging from a 20 minute conversation through to a full home survey with follow up support and post installation checks. In fact, advice is often provided across numerous occasions. The topics commonly considered part of Retrofit Advice are covered in the 'Context' section of this report.

Recognizing the range of possible advice topics and the depth of support, the research grouped types of retrofit advice using these four headings:

- Light touch (e.g. grant eligibility checking; tailored signposting)
- Detailed - non-technical (i.e. . in depth advice but no technical assessments)
- Detailed - technical (i.e. in depth advice including technical elements such as surveys, design work, ongoing coordination)
- Other support (e.g. enabling works, connections to installers)

These headings were used to help evaluate seven key methodologies used in community based retrofit advice provision. These methodologies, selected by drawing on desk research, including the existing typologies from the WoE LEAD project evaluation, serve as the central anchor for the research. Each methodology is discussed in terms of it's advantages and limitations, the ways they are used across the sector, and considerations for best practice and scalability. As will be shown through the report a key factor in community based retrofit advice is that clients are on a 'retrofit journey' and will commonly engage with multiple, overlapping, methodologies delivered by an organisation (or across organisations).

The 7 methodologies selected were:

- Home visits (non-technical)
- Home visits (inc. technical surveying)
- Telephone
- Other remote (e.g. WhatsApp, email, video calls)
- Outreach events (e.g. Pop-up stalls; Q&A sessions)
- Open home style events
- 'Shop-fronts'/Retrofit Hubs

We anticipated the variety of delivery within these headings would be broad, and this is explicitly explored. Variations considered include time taken per approach, tools and technologies used and staffing considerations.

Exploration of skills and knowledge needed for advice delivery were explored in the context of delivering each of the different advice methodologies, as well as in a dedicated 'Skills and Training' annex to the report.

Stakeholder engagement

In designing the stakeholder engagement for this project we completed desk based research to map regional advice provision. Key stakeholders were then directly invited by CSE, and via partner networks, to complete an online survey and attend an in person workshop. Additional detail on responses was gathered by following up with research participants.

41 individuals from 28 organisations were engaged. 22 organisations were represented in the survey, and 22 organisations at the workshop. 29 individuals responded to the survey and 33 attended the event.

The different organisations are different sizes, operating with different governance and delivery models. Collectively they provide locally rooted energy advice coverage in 33 of the 35 council areas covered by the South West Net Zero Hub (not Council of the Isles of Scilly or Cotswold District Council). Three organisations were engaged who are not South West based but who each have extensive experience and exemplar delivery models.

Organisations were either Non-Profits, Community Interest Companies, Community Benefit Societies, Local Authorities, or incorporated companies with a strong reputation and association of working with community energy advice organisations. Housing Associations, organisations providing basic energy advice as one aspect of a much larger service (such as Citizens Advice), and organisations with limited history of providing retrofit advice were excluded from the research. The focus was on organisations specifically providing retrofit advice (rather than only energy advice) with insights into best practice and scalability.

See Appendix 1 for a full list of organisations engaged, their location and legal structure, and the report section 'Community Retrofit Advice in the South West' for further discussion of services offered and reach of these organisations.

Appendix 5: Retrofit advice methodologies (expanded)

These tables set out the different approaches to retrofit advice provision being used by organisations across the South West. They have been used as the basis for the one page summaries in the full report.

Other remote

Advice delivered, or data gathered, remotely through channels including email, messaging platforms (e.g. WhatsApp), video calls and image-sharing. Allowing for greater accuracy or detail when reviewing property specific information. Commonly supported by desk-based tools and data sets, including to translate images into property insights or reports.

Typical time per client	1-60+ mins
Advice depth	Low-High
Relative cost	£
Scalability	High
Retrofit relevance	Medium-High
Trust building	Medium-High
Technical complexity	Medium

Methodology title	**Other remote**
Areas of common variation	Means to support existing conversations include: - Sharing photos/simple videos to better understand client circumstances and to support initial enquiries or light touch advice (e.g. images of an ASHP to determine model type). - Video meetings post-survey to discuss assessment findings. - Use of customer facing planning software (e.g. Fairer Warmth; CSE's Energy Choices Tool) to help advisors understand circumstances and collaboratively create plans. Means to generate additional data include: - Using advanced tools which map a property (e.g. via AI supported photo analysis; LiDAR scans; heat loss sensors) Potential tools and future possibilities include - Remotely accessing Smart Meter data to understand energy usage. Supporting advice and modelling. - Remotely accessing heating controls or Home Energy Management systems. Supporting optimisation and troubleshooting.
Methodology advantages	- Video calls enable a familiarity and provide the possibility of developing greater client trust. They can also feel more formal or like a professional meeting than a telephone call.

	- Video screen sharing allows for talking through of documents (e.g. surveys) which can be technically complex.
	- Images/videos allow for greater advice precision.
	- Can potentially aid accessibility and reach new audiences – e.g. WhatsApp for reaching a 'younger demographic'.
	- Remote surveying tools can save time via:
	  o a reduced need to travel
	  o integrated site analysis, report generation and administration functions
	- Aids with maintaining a record of a property in detail. Allowing advisors to re-visit properties or pass to colleagues (e.g. Retrofit Coordinators).
	- Remote surveys can be completed with client's existing mobile phone or equipment can be posted.

Methodology limitations	- An advanced remote service may be felt to be thorough, but may still miss key detail in the property or client's lifestyle which would be picked up on a home visit. - AI approaches can mean more work for assessors in spotting errors, reviewing outputs, and generally rewriting text. - Not always suitable for those with limited digital literacy, limited access to equipment or data/connectivity. - Advanced modelling software can include high costs for subscription. - Additional costs can be incurred to store images and video on organisational servers or remote servers. - Data protection and system management complexities may be beyond the reach of smaller organisations. - There can be a risk of damage to equipment in posting/loaning technology to households.
Considerations for scalability/best practice	- Potential to encourage clients as part of enquiry forms, or pre-appointment, to share images. Guiding clients to gain key information and perspectives. - Be clear on when remote perspectives offer uncertainty or indication of complexity and when escalation to home visits are required. - Develop tech FAQ and onboarding documents to assist with use of technology and video calls.

Telephone

Advice service provided by telephone. Typically used as the entry point into services, with multiple contact points through a client's journey. Including triage, casework, follow-up support and referrals. Commonly supported by desk-based tools and data sets (e.g. EPC; Solar feasibility software).

Typical time per client	5-60 mins (average c.15 mins)
Advice depth	Low-Medium
Relative cost	£
Scalability	High
Retrofit relevance	Medium
Trust building	Medium
Technical complexity	Low

Methodology title	**Telephone**
Areas of common variation	- Organisations which reach the majority of their clients via telephone spend the longest time per client for this method. - Not every organisation uses telephone for dedicated advice, but for enquiries, triage, booking and support. - Advice can be light touch, provide detailed discussions on a single measure, or in-depth casework. - Level of advisor qualification for phone advice varies, dependent on if primarily a triage or advice role.
Methodology advantages	- Accessible and serves, for clients and referrers, as a clear entry point at the start of a client journey. - Can reach those who do not want to, or cannot, schedule home visits or attend events. - Accessible for harder to reach clients – such as non-English speakers (via translator) or the digitally excluded. - Can generate trust in the organisation and open people up to other services. - Live use of CRMs enables accurate tracking of advice given. - No travel time, saving on costs and risks of no-shows. - Helpful for 'single measure', initial fact finding or simple enquiries. - Helpful for ongoing 'wrap-around' client support and evaluation through the customer journey. - Important for developing and maintaining referral pathways. Including gaining client consent to working with suppliers.
Methodology limitations	- Triage or sales skill sets are not the same as advisor skill sets. Wise judgement and clear internal processes are required to respond to diverse enquiries. Identifying client suitability for 'retrofit' or 'fuel poverty' support, and whether chargeable services are viable.

	- Primarily 'light-touch' advice which does not consider the full circumstances of a client in their home. Especially notable re: complex buildings or enquiries. - Often only available during office hours. - Supporting services are necessary to take customer enquiries further. Including the ability to check documents for grants and wider eligibility criteria.
Considerations for scalability/best practice	- Ensure the telephone line is free to call. - Have a simple online form which can be used to book call backs. Consider usage of software to synchronise calendars with enquiry forms and clearly show availability. Consider 'out of hours availability'. - Ensure telephone staff are provided with prompts/scripts so key information is gathered and recorded. - Use of Retrofit Assessors is excellent for providing in-depth support and gathering detailed property information. However, is less helpful for supporting with the fuel poverty needs. - Employing local people who know the area allows for ease of conversation and relational trust building. - Address accessibility considerations, e.g. having access to a translation line, having staff/volunteers from relevant communities. - Consider use of call software, and handsfree headsets for more efficient transcription or note taking. - Manage expectations, explaining home visits are needed. - Consider data sets or software to support telephone advice.

Outreach events

Energy and retrofit advice delivered in a community setting via, events, drop-ins, pop-up stalls, expert talks, workshops or information sessions aimed at raising awareness, building trust and generating engagement with other organisational services.

Typical time per client	5-30 mins (plus travel, event set up and follow up administration and reporting time)
Advice depth	Low
Relative cost	££
Scalability	Medium
Retrofit relevance	Medium
Trust building	High
Technical complexity	Low

Methodology title	Outreach Events
Areas of common variation	Format and venue vary across organisations depending on: - The funding currently available - Local partnerships and host organisations - Target audience - Depth of advice intended Events can: - Target informal engagement with passing footfall, drop-in 'clinics', or be via more structured talks or workshops. - Be in an existing advice, or more public/open, space. - Offer light touch signposting, gain contact details for follow up support, or attempt more in-depth advice. - Target the general public or "retrofit-ready" groups. - Be 'standalone' or part of wider activity (e.g. fairs)
Methodology advantages	- A potentially excellent source of lead generation, especially in events with good reach and publicity. - Can engage people who wouldn't normally access formal services, by going to where people are, and by being in trusted spaces (including 'hard to reach' communities). - Presence at an event can ensure a 'captive audience' who may not otherwise consider the topic. - Be a soft entry point into the topic/service. Being the first place clients engage with retrofit concepts. - A consistent presence builds trust and visibility over time. - Supports development of partnerships and brand awareness with referral agencies or services present. - Materials can be adapted to a range of settings. - Once a relationship is built with a host, this ensures presence for multiple ongoing occasions. - Can provide access to community networks which reach beyond event attendees. - Repeated presence at events enables a deepening of support to regular attendees.
Methodology limitations	- Records can be inconsistent. Due to an unwillingness to share details or practical constraints at busy events. - It can be hard to measure impact beyond attendance, anecdotal feedback, or limited follow-up data. - Difficult to provide in-depth or tailored advice in public settings, particularly where privacy is needed. - Can be resource intensive relative to measurable retrofit outcomes and wider service take up. - Staffing events can be challenging at evenings/weekends.

	- Yield of enquiries is uncertain and can fluctuate widely between events but requires similar staff input. Busy events with high footfall (e.g. summer shows) may not convert to meaningful conversations. - Hard to confidently reach a target audience, with staff needing to prepare for general energy and retrofit advice. - Engaged clients may be driven by the need for "crisis support" (e.g. bills, housing issues), meaning limited progression to deeper retrofit discussions at the event. - At return venues there is a risk of 'running out of people'. - Regular drop ins can take 1 year+ to build regular footfall. - Staff may have to contend with apathy or even anger and contempt from the public related to the topic. Safeguarding of staff needs to be considered.
Considerations for scalability/best practice	- Understand expected audience before committing attendance, to enable tailoring of materials. - For talks consider having a minimum number set for registered attendees, and be willing to cancel an event. - Piggybacking on established events improves reach and reduces organisational requirements. Consider embedding in existing community settings (e.g. libraries, GP surgeries, food bank models), where relationships already exist. - Blend support with LA, VCSE, health partnerships - Have clear onward pathways and signposting, which meet diverse client needs and convert interest. - Providing options for more private conversations can improve the quality of advice and data capture - Blending outreach with digital content (e.g. photos) can extend reach beyond in-person events. - Recruit staff who are confident in approaching people - Research and build contacts with particular social groups and meetings for reaching minority communities. - Ensure funding is consistent for ongoing drop-ins.

Open home style events

Visits to real homes where householders share their experiences of retrofitted homes or planned retrofits, enabling people to see measures in a trusted, lived environment.

Typical time per client	Range: 1-60+ minutes Average: c. 18 minutes
Advice depth	Low-Medium
Relative cost	££
Scalability	Medium
Retrofit relevance	High

Trust building	Very High
Technical complexity	Low-Medium

Methodology title	**Open home events**
Areas of common variation	– Traditionally events are 'non-technical' with homeowners talking through home improvements/plans. Giving the local community an opportunity to ask questions. – Dependent upon capacity/staffing/focus, technical iterations are possible, with technical advisors present. – Not-yet-green or damp and mouldy open homes can be useful if someone is technically capable of carrying out a guided building survey and diagnosing disrepair issues. – Can be 'traditional building' specific open home events. – Can be run as one off event, over a period of time, or as a local list of people who would be happy to do more repeat/on-demand sessions. Can be pre-booked or drop-in. – Community buildings, or other public buildings can be used if concerns around using people's homes. – Can be linked to other events such as 'open gardens'. – Heat pump specific open homes are felt to be popular.
Methodology advantages	– Evaluation shows visitors are more likely to install measures – Event attendees are likely actively considering retrofit. Can be especially helpful when not sure how to start a project. – Can serve to start larger community conversations, shifting attitudes and normalising retrofit. A good chance to hear about regional housing stock, similar to one's own home. – Real stories are engaging, relatable and reassuring. Information is trusted and makes retrofit feel achievable and accessible. Events are no-pressure and conversational. – Not-Yet-Green events can help retrofit feel accessible. Removing pressure of 'perfect homes' or complete retrofit. – Can provide a platform to discuss 'easy measures', repair and maintenance, alongside larger measures. – People who are considering measures, e.g. ASHP, can understand both the install and the ongoing living situation. – Once a cohort of willing homes are established, re-running of events can be easier and less resource intensive. – Can be a good source of lead generation for wider service, creating good reach and publicity
Methodology limitations	– Finding, vetting and preparing suitable homes and willing homeowners can take significant time and hand holding. – There may be a need to vet installers associated with the works, as they will likely be referenced by the homeowner.

	– Homes need to be vetted to ensure information shared is good practice, and not promoting maladaptation. – Event staffing and promotion can take significant resource. Usually requiring support from volunteers. – Care needs to be taken with regards to insurance and other risk management and safeguarding assurances.
Considerations for scalability/best practice	– Selecting homes involves many factors, e.g. accessibility, housing type, measures installed, host availability. – It can be helpful to select homes which are typical of local characteristics or experiencing common problems. – Free use greenopenhomes.net and visitaheatpump.com can be used to list information to support local events – Volunteer expenses and insurance costs consideration. – Consider encouraging existing organisation staff/champions/volunteers to be hosts. – Ideally an expert is available to support the homeowner and lead parts of the tour. Especially for Not-Yet-Green events. – Information resources (e.g. measure fact sheets) should be available, for attendees. Including contact details for the local community energy organisation and their service. – Sourcing homes and promotion can be aided by linking with established schemes (e.g. open garden or open art events). – Empty properties (e.g. between tenants) can be great examples. – Consider simultaneous activities in a public location (e.g. village hall) to complement open home visits. This could include stories from those unwilling to open their home, or provide further access to expertise and resources. – Using events to capture case studies and synchronising promo activities can raise awareness beyond the day.

Home visits (non-technical)

A home-based advice service delivered without advanced surveying or diagnostic equipment. However, some home visits can include basic surveying (e.g. thermal imaging camera). Advisors typically assess the home through observation and discussion with occupants. They provide one of the strongest foundations for supporting households through an energy advice or retrofit journey but are resource-intensive.

Typical time per client	30-60+ minutes (average c.61 minutes), plus 20-60 mins travel, follow up administration, referral and reporting activity.
Advice depth	Moderate to High
Relative cost	£££
Scalability	Low-Medium

Retrofit relevance	High
Trust building potential	Very High
Technical complexity	Low-Medium

Methodology title	**Home visits (non-technical)**
Areas of common variation	- Home visits vary by length and detail. - 'Complete' visits will usually aim to complete a full walk around of the property. Although clients may wish for advice on particular areas. - Other retrofit advice visits may focus on a single measure or issue, such as troubleshooting a newly installed technology or setting up tariffs. - Post-visit report formats will vary. From follow-up emails with key points and next step actions, to structured reports.
Methodology advantages	- High potential to create a trusting relationship and rapport between the advisor, and consequently the organisation. - Valuable for reaching some 'hard to reach' or vulnerable clients including those uncomfortable on the phone. - Allows fuller insight into a clients' circumstances, which may not be visible on the phone. Including behaviours, motivations, vulnerabilities, health, or cultural factors. - Allows fuller, more accurate, insight into the property's characteristics and context. Including fabric, heating system, and repair and maintenance aspects. - Allows advisors to complete administrative tasks such as physically seeing bills or grant eligibility criteria. - Can achieve 'quick wins', e.g. help with newly installed tech or instal of measures like TRVs, radiator foil or light bulbs. - By witnessing the reality of a client/property's situation, advisors can pick up issues which need wider support services. The advisor, who has built trust, can gain consent and signpost to wider services if needed.
Methodology limitations	- Travel time, especially in rural areas, is resource intensive. Amplified by the risk of 'no-shows'. - Schemes may limit the time for visits, which affects the provision advice. Especially on larger properties. - Responding to in-visit context means conversations may not be structured to provide full advice or capture all necessary information. Advisors may not have ease of access to organisational support systems, scripts and resources, potentially limiting advice offer. - Additional insurance and safeguarding risks (e.g. dangerous clients or hazardous properties).

Considerations for scalability/best practice	- Staff with practical knowledge of DIY and building repair and maintenance is valuable. Advanced support offers may want surveyor or traditional building experience. - Train staff to understand the common housing stock in the region and common challenges with local buildings. - Develop partnerships and understand the referral requirements to make requests to wider support agencies. - Manage expectations from the client before visit, such as what support can be provided and the expected timeframe. - Gain any supporting materials and client motivations clearly in the triage/pre-visit stage to allow advice preparation and bringing of suitable resources. - Use of thermal imaging can help understand the property better and be a useful conversational aide.

Technical Home Visits

Property visits involving specialist surveying techniques, measurement equipment, diagnostic tools and modelling processes to provide detailed technical information on building performance and retrofit options. Helpful for providing detailed evidence and technical confidence before committing to significant retrofit investment. Especially important for 'complex properties'.

Typical time per client	30-60+ mins plus 20-60 mins travel, follow up administration, referral and reporting activity.
Advice depth	High
Relative cost	~~£~~~~£~~~~£~~~~£~~
Scalability	Low
Retrofit relevance	Very High
Trust building potential	High
Technical complexity	Very High

Methodology title	**Technical Home visits**
Areas of common variation	- Visits can be used to: o Generate holistic plans (e.g. modelling potential measures using SAP data) o Map and assess current property performance (e.g. via Retrofit Assessments, or Heat Loss surveys) o Complete single-issue diagnostic, compliance and surveying (e.g. air tightness testing; ventilation surveys; damp and mould surveys) - Formats within some of the above approaches vary, for example with modelling software/datasets used, or with more precise equipment (e.g. thermal imaging via drone).

	- Technical visits can commonly be completed via sub-contraction or signposting.
Methodology advantages	- Allows for more in-depth and finely tailored advice. - Accurate data on actual energy usage, rather than modelled consumption informs better advice. For example, presenting more accurate saving and payback estimates. - Gathering accurate assessment information of a property can save time for future parts of the retrofit supply chain (e.g. designers, installers). Saving the need for additional property visits and associated costs.
Methodology limitations	- The same potential limitations of other home visits, such as safeguarding. - There is confusion around best practice, and frameworks and approaches to surveying can change. For example, BS4014 as a new Retrofit Assessment standard or modelling software giving different savings and cost estimates, or different COP estimates for ASHPs. - Data sets in modelling software may be incomplete or inaccurate, especially for locally nuanced construction, such as certain stone and traditional buildings. - There is a danger of people using technical equipment/tools without full understanding, experience or qualifications. - The wider ecosystem may not use another organisation's surveying material, risking duplication of cost. - Single measure diagnostics do not consider wider holistic property needs. - Technical advice work may overlook more fundamental advice work, such as discussing heating controls, behaviour change or basic repair and maintenance work. - The skills required by technical surveyors may not align with the soft skills needed for providing person-centred advice. E.g. regarding co-benefits and signposting around health. - Expensive surveying and modelling can be beyond the reach of households, or households may not see them as good value. Take up of property modelling services has been low. - Services can be oversold or unnecessarily detailed for the need, and use language more suited to building professionals which is overwhelming for the client.
Considerations for scalability/best practice	- Ensure triage/sales teams are trained to understand the different services and can match these to the clients' true needs. Without overselling. - Ensure technical surveys are combined with whole-house, client centred advice. Considering factors such as budget, motivations, actual energy usage or digital capabilities.

	- Emphasise 'soft skills' in recruitment and ongoing training of technical surveyors, to support holistic advice. - Consider upskilling non-technical advisors on key language and findings of technical reports, to enable client support. - Manage expectations around technical depth of data gathered and next steps. For example, whether detailed or mearly indicative (e.g. desk based solar assessment). - Build in client appropriately timed post-survey check ins as part to help the interpretation and use of findings. - Understand your position in the ecosystem so that data gathered can be trusted, understood and used on subsequent stages of the customers retrofit journey.

'Shop-fronts'/Hubs

A permanent or semi-permanent physical location where residents can access energy advice and retrofit support. Beyond direct advice provision, hubs have the potential for wider community activities and workshops, fitting into and advancing the wider retrofit support ecosystem.

Typical time per client	Varies
Advice depth	Variable
Relative cost	£££
Scalability	Medium
Retrofit relevance	Medium-High
Trust building	Very High
Technical complexity	Variable

Methodology title	**Community Retrofit Hubs/Shopfronts**
Areas of common variation	- Not usually intended as a dedicated retrofit service, but for meeting the general energy advice needs of a community. - Can be a dedicated shop/hub managed by an organisation, or a regular presence in a rented space such as an existing community centre. - Location can either be in a central location or in a more localised community.
Methodology advantages	- Being locally based means advice is accessible, and the presence builds trust in the community (especially among marginalised, or non-English speaking communities). Also enabling the ability to listen to the community and understand local need. - A consistent presence can lead to a busy service reaching good numbers of clients. - A physical space allows for an ease of checking grant eligibility, or other, paperwork.

	- Respondents found a physical space had been particularly useful for supporting retrofit on government schemes. - Having a physical space allows for running of workshops, classes and events – bringing in different audiences and partners. Also, allowing for potential additional income/funding streams. - Spaces can double up as storage spaces for operational needs such as outreach materials or light-tough measures (e.g. draught excluders) - Spaces can serve as a wider vehicle for retrofit in the region. Bringing together key players and building meaningful relationships with partners. For example, installers, local authorities and health interests.
Methodology limitations	- The cost of running a space, with associated overheads and a consistent staff presence, can be prohibitive. - Significant safeguarding and organisational policies are required. - Depending on location chosen, the hub is likely to only reach a limited section of people. - Respondents felt that to date hub spaces have not been valuable for reaching 'self-funded' retrofit clients. However, this aim has not been their primary driver.
Considerations for scalability/best practice	- Choosing a location is a key consideration. Identifying areas which are likely to serve a distinct community have worked better for respondents than city centre locations. - Consider the needs and expectations of the target audience. For example, including spaces for children accompanying parents to advice appointments. - Soundproof booths can be used to ensure suitable advice spaces are available and maintain confidentiality.

Appendix 6: Comparing retrofit advice methodologies

Overall comparison of methodologies

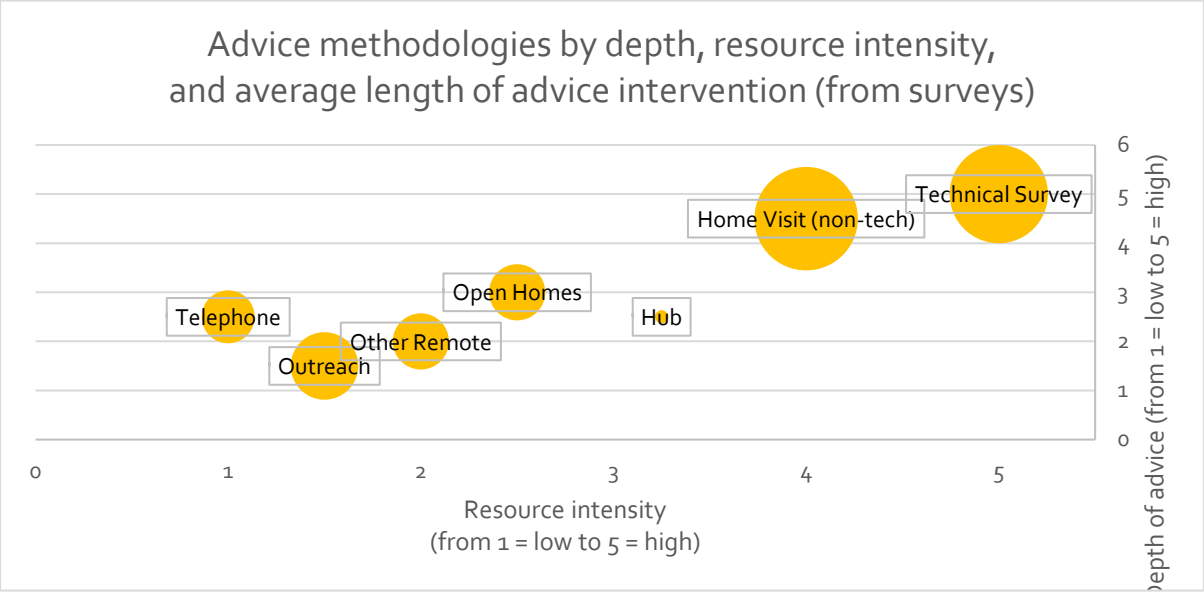
This table gives an overall summary of the different methodologies explored in the research, and their relative benefits for these key factors:

Reach: ability to engage large numbers of people
Advice Depth: ability to provide tailored support
Trust Building: ability to establish relationships
Retrofit Relevance: contribution to retrofit decision-making and delivery
Scalability: ease of expanding delivery
Cost Efficiency: households reached relative to resources required
Technical Complexity: level of technical knowledge needed by delivery staff

Method	Reach	Advice Depth	Trust Building	Retrofit Relevance	Scalability	Cost Efficiency	Technical Complexity
Telephone	5	2	3	3	5	5	2
Other Remote	4	3	3	4	5	4	3
Outreach Events	4	1	4	2	3	3	2
Open Homes	2	3	5	5	2	3	3
Home Visits (Non-Technical)	2	4	5	5	2	2	3
Technical Home Visits	1	5	4	5	1	1	5
Hubs / Shopfronts	3	3	5	4	3	2	2

Scores are given from 1-5 (where 1 = low and 5 = high).

Advice depth and resource intensity



This chart shows the relative depth of advice and resource intensity of the different methodologies. The size of the bubble gives an indication of the average length of advice delivery for each methodology (based on survey results). (There is insufficient data to give an average session length for the Hub approach.)

Note, there is variability across methodologies in the depth (and breadth) of advice and resource intensity, depending on circumstances (e.g. the funding provision, the advice organisation, the advisor and the person receiving advice). Taking Green Open Homes as an example, one visitor might spend a significant amount of time at an event, potentially speaking in depth to multiple householders who have installed improvements, and installers, builders, surveyors or other experts supporting the event. Another might drop in briefly to a small number of homes and have shorter interactions. Similarly, the event itself may be huge, taking months of planning and organising with large time commitments from paid staff, home owners and volunteers, or it could be a short, small, very local event arranged on a low budget with fewer contributors.

Customer journey mapping

This chart shows where the different methodologies tend to sit on the customer journey (noting that it is not necessarily a linear process hitting all the touchpoints). Based on survey results and sessions at the in-person event.

Method	Awareness	Engagement	Planning	Installation	Follow-up
Telephone	●●●	●●●	●	○	●●●
Other Remote	●●	●●●	●●	●	●●●
Outreach Events	●●●	●●	○	○	○

Open Homes	●●●	●●●	●●	○	○
Home Visits (non-technical)	●	●●●	●●●	●	●●
Technical Home Visits	○	●	●●●	●●●	●
Hubs / Shopfronts	●●●	●●●	●●	●	●●

Legend: ○ = Limited role ● = Moderate role ●● = Significant role ●●● = Primary role

Suitability of advice methodologies

The table is intended to summarise – broadly – the suitability of different advice methodologies based on the funding/delivery priorities, whether those are keeping costs low, engaging vulnerable households, generating leads, supporting customers with retrofit decisions, giving advice specific to a given property, or a combination of these.

Method	Typical Cost	Suitable for Vulnerable Households	Generates Retrofit Leads	Supports Retrofit Decisions	Technical Evidence Utilised
Telephone	£	High	Medium	Low-Medium	Low
Other Remote	£-££	Medium	Medium	Medium	Low-Medium
Outreach Events	££	High	High	Low	Low
Open Homes	££	Medium	High	High	Low
Home Visits (Non-Technical)	£££	Very High	High	High	Medium
Technical Home Visits	££££	Medium	Medium	Very High	Very High
Hubs / Shopfronts	£££	Very High	Medium	Medium	Low

Skills and Training in Community Led Retrofit Advice Provision

This annex to the report "**South West Retrofit Advice Provision in the Community Sector"** concentrates on skills and training within this sector. It draws on input from the same stakeholders as the main report, namely those operating in the sector across the South West.

Key themes which emerged were:

- the breadth of skills required for good retrofit advice
- variation in organisational expectations
- importance of CPD and organisational support
- gaps in current qualifications and training provision

A. Breadth of skills needed

The range of topics which can be covered under retrofit advice is broad, and within each topic advice depth varies greatly and needs to understand the local context, be that weather conditions, housing types, local grants, or the planning and policy context. Foundational non-topic specific knowledge include areas such as Safeguarding and GDPR. Topics such as tariff availability, local grant schemes and technological advances often subject to constant change.

At present, there are not clear definitions of the different advisory roles, or competency frameworks to deliver them effectively, but it is agreed that the industry has rapidly evolved in recent years. Several contributors to this research suggested that 'basic' retrofit advice no longer exists. Topics which used to be considered specialist technical knowledge are now part of the baseline of advice (e.g. heat pump technologies). This means that advisors, even for shorter interactions with customers, need a broad grounding and a level of technical expertise.

Beyond topic specific knowledge, skills in action planning, risk management, the tailoring of communication, and trust building are all essential for advice delivery. With interpersonal skills being especially important in a community context which can involve working with people with vulnerabilities, language barriers or other needs and challenges.

Considering the above, organisations can find it hard to understand how to equip an advisor, or advice team, with the skills needed to give the best advice. It is acknowledged that no single training course can cover everything that is needed and no individual advisor can know everything. Continuous learning by advisors and a culture of team working and access to peer support are essential.

"Advisors are supported to hold, or work towards, relevant industry-recognised qualifications to ensure high-quality, consistent advice. This includes NEA Level 3 in Energy Awareness for Energy Advisors and Retrofit Assessor qualifications, and Retrofit Advisor training to support effective client engagement.

Where required, the team also draws on specialist expertise within the organisation, including PAS 2035 Retrofit Coordinators and Energy Assessors, to ensure technical compliance and oversight. Advisors are further supported through ongoing CPD delivered by the technical team, including training on traditional and hard-to-treat buildings, moisture and ventilation, and vulnerability and safeguarding, ensuring advice is both technically robust and tailored to the needs of the households we support." Severn Wye Energy Agency

B. Organisational expectations

In the research survey we asked *"What skills/knowledge areas does your organisation expect your advisors to have?".* Organisations described their organisational expectations against 10 topic areas, with response options being *"All advisors require this", "Encouraged for advisor CPD", "Reviewing organisational requirements", "Not required", "Unsure".*

Responses indicated that strong communication skills are expected across all organisations. Tailoring advice and operating in line with policies were also expected by the large majority. Knowledge of energy efficiency measures, damp and mould, and fuel poverty and vulnerability are broadly required. Although common, fewer organisations require advisors to have technical knowledge of domestic renewable technologies and smart tariffs. Knowledge of historical/traditional buildings and PAS2035 is expected by only a third of organisations surveyed. These findings were supported with text responses, where respondents expanded on specific qualifications their advisors held.

Responses indicated that different organisations may expect different qualifications for similar roles, for example, 361 Energy use qualified Retrofit Assessors on their telephone support service where CSE used internally upskilled energy advisors.

C. Existing advisor training

In 2024 The National Retrofit Hub completed a mapping exercise of accredited retrofit related courses. It listed 164 courses. 63 of which covered fuel poverty or retrofit advice related topics. This reflects the fragmented context of the training market.

The below tables list accredited courses and wider non-accredited courses which have been shared by research participants as being part of their advisor training. It is clear that there are some core accredited training options being taken up, and that these are bolstered by a wide range of non accredited continuous professional development opportunities.

Research participants also named a wide range of training relating to wider professional practice and compliance. This including topics such as Asbestos awareness, Health and Safety Risk Assessments, Manual Handling, Data Protection and GDPR, Safeguarding, Lone working, Home visit safety and security.

Topic Area	Examples of accredited training	Non-accredited topics
Energy and Fuel Poverty Fundamentals	• Energy literacy and Energy Advice • Identifying Vulnerable Customers, Fuel Poverty and Energy Debt	• Accessing Fuel Banks and Crisis Support • <1 day introductory sessions (E.g. CSE's Energy Essentials training; Community Energy Pathways' Energy Champion training) • Carbon Monoxide awareness • Financial wellness • Using/optimising heating controls • Private rental sector training – inc. Renter's rights • Scams and Fraud awareness
Retrofit and Building Performance - Foundational	• Retrofit (introductory knowledge) • Renewables (introductory) • Retrofit Advice • Renewables and measure-specific learning	• <1 day introductory sessions (e.g. CSE's Retrofit and Smart Energy Essentials; PEC's Retrofit for All) • Climate literacy • Understanding EPCs and MEES regulations • Damp and mould awareness
Retrofit and Building Performance - Enhanced	• Historical and traditional buildings courses • Damp and Mould awareness • Retrofit Coordinator • Retrofit Designer	• CSE's Smart energy market review webinar (re: tariff landscape) • Smart meter trouble shooting • Specific heating upgrade, PV and battery technology deep dive sessions • Smart heating controls and Home Energy Management systems deep dive session
Energy/Building Assessment	• Domestic Energy Assessor (DEA) • Retrofit Assessor	• Training on bespoke tools (often licensed)
Surveying and Specialist Technical	• Heat Loss Assessment • Heat Pump Sizing/Design • Air Tightness/ Pulse testing • Thermal Imaging courses • Draught and Ventilation surveys/Background Ventilation Testing • Borescope • Solar assessment (desk based) • U-Value assessment • Whole house plan	• Specific modelling software familiarisation • Spruce software • Heat Punk software • Build Test Solutions Pulse training • Coordination and retrofit assessment training • Solar Wizard • Google Maps Satellite imager • Build Test Solutions hardware and software • PPR (People Powered Retrofit) software onboarding and support

	• Minor Electrical Installation Works	
Basic energy advice and Customer Service	• Information, advice and guidance	• Handling difficult calls, conflict resolution and de-escalation • Customer service and complaints handling • Empathy and trust building • Behaviour change support
Vulnerable clients, Accessibility and Wellbeing	• Suicide prevention and awareness • Mental health awareness • Dementia awareness • Working with vulnerable households • Domestic Abuse Awareness • Trauma informed practice	• Cultural and language awareness • Unconscious bias • Refugee awareness • Neurodiversity awareness • Carers/young carer awareness • Gambling harm awareness • Resilience and self-care training (advisor focused)

The range of non-accredited topics listed reinforces the extent to which organisations and individuals maintain and enhance their skills and knowledge. Non-accredited upskilling can take the form of in person and online courses, webinars, conferences, industry events, self-directed learning and reading. The full list put forward by organisations participating in the research is shown below.

a. In house training courses/programmes (in topic areas named above)
b. Shadowing colleagues or others assessor
c. Supervision, buddying, 'handholding' and mentoring
d. The use of competency frameworks
e. Attendance of communities of practice (internal or external)
f. Self-directed learning and research
g. Access to senior caseworkers
h. Structured internal resource banks
i. Retrofit Advice forums

For many advisors this is part of their induction to the job role, for many it's integrated with their work practice as Continuous Professional Development (CPD).

It should be noted that to maintain compliance with PAS 2035 and accreditation bodies for roles such as Retrofit Assessors and Retrofit Coordinators, there is a CPD requirement which can range from 20 to 40 hours a year and can include both technical and non-technical topics.

D. Gaps in the current training landscape

In this section we review some of the content of the above accredited courses, and discuss where gaps in content, issues with format or an overreliance on qualifications can lead to risks in advice

delivery. The 'detailed comparison of retrofit course content' table below sets out the core retrofit courses (Levels 3-5) against topic/skill areas. Observations around gaps in provision shared here are related to courses and curriculum, not providers. Feedback from stakeholders on the format of training and assessment has been captured as generalised points. The focus is mainly on Level 3 and 4 qualifications, which are the main qualifications held by advisors.

Entry criteria, training format and assessment methods

The length of study time required for both the Level 3 Introduction to Retrofit and Retrofit Advisor courses is approximately 2-3 days, and final assessments are multiple choice tests. Level 3 Domestic Energy Assessor (DEA) courses take approximately 3-5 days of study time and are assessed using a portfolio of evidence demonstrating use of practical property surveying software. There are usually no entry criteria for these courses.

Level 4 Retrofit Assessor courses require an existing DEA qualification, are completed in approximately 8-10 days of study time, and are assessed using a portfolio of evidence demonstrating practical surveying.

For all the above courses, while classroom options are available, the majority of are taught online with no practical in-situ building elements.

There were concerns raised by research participants that the absence of a requirement for existing knowledge, the proliferation of online learning, and the assessment processes lacking robustness may result in advisors unable to give the best standard of retrofit advice in the real world. It was noted that qualified Retrofit Assessors and Domestic Energy Assessors are often considered as 'experts' or having 'specialist skills', but compared to Retrofit Coordinators or Building Surveyors they are actually 'entry level' roles.

Content

The focus of DEA and Retrofit Assessor courses leans toward data collection rather than giving advice, meaning that the training pathway leads to people being able to carry out technical assessments but not necessarily equipped with strong advice and communication skills, and rarely with strong understanding and knowledge of broader energy advice, fuel poverty and support for vulnerable customers. DEAs and Retrofit Assessors may be encouraged to complete Retrofit Advisor courses, but in practice this is not common.

In terms of the technical content of courses, the focus of DEA and Retrofit Assessor courses on providing assessments means that individuals can come out of this training with poor understanding of buildings and construction as a whole, including the impact that measures will have on a building. Many participants shared the viewpoint that real world experience of different housing types and measures are essential. This is especially the case for older or 'traditional' buildings.

"Teaching people that the average homes losses X amount of heat though their walls is nonsense and untrue and advising people to do draft proofing without understanding why ventilation is important doesn't help keep anyone healthy. Telling people heat pumps don't work in old buildings or that you

need to cover all our building with polystyrene before you can fit a heat pump has not helped us. Pushing smart controls that are not smart also doesn't help." Research participant

Some of the areas which are not routinely covered in the accredited retrofit course include:

- The potential faults with the EPC system as a measurement for properties and energy efficiency compared to real world performance.
- A focus on energy efficiency 'measures' in isolation without understanding buildings, and foundational principles of building physics. Courses don't consider how existing buildings were built, what issues they may face, the practicalities of basic repair and maintenance and moisture in buildings.
- Ventilation considerations and damp, mould after failed insulation are not covered in DEA courses. Fabric, moisture and ventilation are significant theoretical aspects of Retrofit Assessor courses, but without greater foundational knowledge of buildings, understanding of the implications and unexpected consequences of installations will be limited.
- Foundational knowledge of buildings, which is especially important for traditional buildings which require different understandings. Approximately 20–25% of UK homes are traditional construction.
- Practical integration and day-to-day operation of energy and heating measures. For example, understanding Air Source Heat Pumps optimal settings, knowledge of configuring 'smart' heating controls, how solar panels and batteries can be integrated with heating systems, the importance and practicality of balancing radiators, Smart Meters and Smart Meter issues, guidance on appropriate tariffs.
- Fuel poverty related courses include discussion of energy debt, and the role and limitations of the advisor. However, this is not be covered in retrofit courses. Advisors need frameworks to be confident how to advise, or not advise, on the financial implications of technologies.
- The context of the construction industry and legal considerations are not covered. This includes Building Regulations, the Building Safety Act, Construction Design and Management Regulations. In some locations there is a need to consider Radon, and the role of ventilation.
- Whole life carbon considerations (including embodied carbon of existing buildings), is not taught and routinely considered in Level 3 and 4 courses. There is some consideration in Traditional Buildings courses.
- Courses do not provide an understanding of the local area, it's buildings, weather and population.
- Insufficient attention is given to the impacts of climate change, likely future scenarios and how this should be informing planning (for example, the forecast extremes of heat and rainfall). Buildings need to be retrofitted to account for overheating and rainwater management.

Changing landscape

Retrofit context and understanding is constantly changing. Below are some examples of areas which are not considered in qualifications or if they were covered may now be outdated.

- Regarding changing regulations, people trained in PAS2030/35 pre-2025 are not trained in the latest Retrofit Assessment legal standard: BS40104:2025. This standard includes additional

material and requirements of a retrofit assessment which previously trained assessors may not be aware of.

- Regarding policy changes it is expected that there will be an increase in financial products relating to retrofit as a result of the Warm Homes Plan.
- Regarding technological changes, plug in solar has been recently approved in the UK. This will not have been considered in previous courses and is not considered in EPCs or Retrofit Assessments.
- Other technologies will continues to advance, such as software developments and integrated whole house systems. Advisors will increasingly be at risk of trying advise on systems and controls they can't explain or amend.

Risks

The concern is that when advice is given based on insufficient levels of knowledge and understanding it can lead to poor decisions or installation of inappropriate measures, potentially causing damage or harm.

It is well documented that retrofit gone wrong can have dramatic consequences on properties and the people who occupy them. That can be severe damp and mould problems as a result of insulation without adequate ventilation, overheating because of insufficient consideration of ventilation or heat demand, or very high energy bills due to incorrectly fitted (or operated), heating systems. If training courses do not adequately cover topics needed for good retrofit advice (e.g. excluding detailed information on building or measure performance) risks of negative consequences are higher.

As an example, training often focusses on installation of new measures, but with greater understanding, optimising what is already in place instead of unnecessarily replacing systems with new measures may have better results and reduced client costs.

"I've found a few cases where ASHP have replaced storage heating and the tariff has stayed on E7 - which is inappropriate and expensive." Chris, Nadder Community Energy

Similarly, with training which does not cover understanding of local contexts can mean assumptions being applied ubiquitously, increasing risk of harm or damage where specific conditions should be taken into account. For example, the South West is an area highly exposed to wind driven rain. That means when considering wall insulation, weather exposure needs factoring in as an additional risk.

Theoretical risks of measures may be touched on in some courses, but risk mitigation is not considered in courses in a holistic structured way which helps with advice and decision making.

Where such large risk factors exist, it is problematic that courses have low entry levels and there is no ongoing guarantee of support from those with more knowledge and experience. It can be common to perceive Retrofit Assessors and Domestic Energy Assessors as being 'experts' or having 'specialist skills', but they may be practicing with relatively low levels of knowledge compared to Retrofit Coordinators or Building Surveyors.

"The sector remains quite fragmented. Different organisations and advisors often focus on different measures, sometimes reflecting their own training or areas of confidence rather than the full range of

options available to the household. For example, some may focus more on insulation, others on heat pumps." Research participant

Where knowledge/experience is not sufficient, risks are also enhanced by people not having sufficient *awareness* of the limitations of their knowledge. Advisors are most likely acting with good intentions, a desire to help clients and to do a professional job. However, they may be oversimplifying or skewing their advice based on the areas they are feel confident in and an unawareness of the full complexity.

Those with technical knowledge not being adept at communicating effectively with the necessary audiences, and vice versa, can impact the suitability and effectiveness of advice for the audience.

Detailed comparison of retrofit course content

The below tables comparing different retrofit courses, their content, length and their entry requirements should be treated as exploratory and indicative. The were generated by an experienced Retrofit Coordinator working at CSE in Summer 2026 through a combination of desk research and conversations with retrofit colleagues (both newly qualified and with older qualifications).

	EPC production (RdSAP)	Retrofit assessment (PAS2035)	Customer advice skills	Fuel poverty & vulnerability	Smart meters & tarrifs	Technical building knowladge	Renewables	Low carbon heating	Improvements to existng heating systems	Individual fabric measures	Whole house retrofit	Moisture management & ventilation	Compliance / standards	Building types and defects	Historic/traditional building advice	Embodied carbon	Sustainability (broad)	Fire safety	Climate adaptation (overheating, flooding, etc)	Building regulations compliance	CDM awarenes s	Industry context (Hackitt review, etc.)
Level 3 DEA	Y	N	Limited	N	N	Basic	N	N	N	Introduction	N	N	Basic - EPC	N	N	N	N	N	N	N - EPCs only	N	N
Level 3 Retrofit Assessor	Y	Y	Limited	N	N	Basic	Basic Intro	Basic	Basic	Y	Partial	Basic	PAS 2035	Basic	N	N	Limited	Basic awarenes s	Limited	PAS2035	N	Intro - PAS2035 context
Level 3 Energy awarenes s	N	N	Y	Y	Y	Basic	N	N	Behaviour al only	N	N	N	N	N	N	N	Behaviour at	N	Behaviour at	N	N	Intro - PAS2035 context
Level 3/4 Retrofit advisor	Some	Some	Y	Y	Moderate	Moderate	Moderate	Basic	Some	Moderate	Partial	Moderate	Some	Moderate	Basic	Intro	Basic	Basic awarenes s	Intro	Some	N	Intro - PAS2035 context
Level 3 Repair and maintena nce of traditional buildings	N	N	N	N	N	Y	N	N	Fabric focused	Y	N	Y - Strong	N	Y - Strong	Y - Strong	Intro	Traditiona l methods	Some	Moderate	N	N	Intro - PAS2035 context
Level 3 Energy efficiency in traditional buildings	N	Contextua l	N	N	N	Y	Moderate	Some	Indirect	Y	Moderate	Y - Strong	Some - Heritage	Y - Strong	Y - Strong	Limited	Y	Some	Y	Some	N	Intro - PAS2035 context
Level 4 Retrofit assessor	Y	Advanced	N	N	N	Y	Moderate	Basic	Some	Y	Partial	Y	Y	Y	Basic	Limited	Moderate	Basic awarenes s	Limited	Y	Basic awarenes s	Intro - PAS2035 context
Level 5 Retrofit coordinat or	N	Oversight	Some	N	Limited	Y	Y	Y	Y	Y	Y	Y	Y - Strong	Y	Some	Moderate	Y	Y	Moderate	Y - Strong	Moderate	Intro - PAS2035 context
Level 5 Retrifit designer	N	Limited	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y - Strong	Y	Some	Moderate	Y	Y	Moderate	Y - Strong	Moderate	Intro - PAS2035 context

Table comparing retrofit training courses

Qualification / Role	Taught duration (typical)	Time to complete qualification (typical)	Typical time to workplace competence (with support)	Assessment type	Assessment rigour (indicative)
Level 3 Energy Awareness / Intro retrofit	2–5 days	2–4 weeks	N/A (intro only)	MCQ test	Low
Level 3 DEA (Domestic Energy Assessor)	3–5 days	2–6 weeks	3–6 months	MCQ test + portfolio	Low–Moderate
Level 4 Retrofit Assessor	3–5 days + DEA pre-req	4–8 weeks	3–6 months	Portfolio + knowledge test	Moderate
Level 3 Retrofit Advisor	10–20 days (spread)	2–4 months	6–12 months	Portfolio + case study + knowledge test	Moderate
Level 4 Retrofit Coordinator	15–30 days (spread/part-time)	3–9 months	12–24 months	Portfolio + professional judgement + knowledge test	Moderate–High
Level 5 Retrofit Coordinator (advanced route)	Extended practice-based learning	6–12 months	18–36 months	Portfolio + professional judgement	High
Level 5 Retrofit Designer	20–40 days (spread)	4–12 months	18–36 months	Portfolio + design assessment + professional judgement	High

E. Skills and Training Recommendations

Considering the challenges of an ever-changing context with inherent risks, below are some recommendations which have emerged to support organisations to develop their teams.

Recruitment

a. Thinking about the complex skill set covering 'hard', 'soft' and 'procedural' areas, community organisations indicated that the most important skill is the ability to talk to people, read them and adjust content to enable the client to understand and engage. All skills can be learnt.
b. Recognizing the amount to learn and the constant learning journey, look to recruit people who have a clear personal interest in the topic and are self-directed learners.
c. Think about your target audience and, if appropriate, recruit specifically for existing trusted relationships, lived knowledge, or spoken languages.
d. For more technical roles, it is important to recognise that holding a qualification does not automatically equal competence or good advice. Do not have an overreliance on qualifications but hire with experience in mind (e.g. of different building types, or lived reality of measures). Asking for a portfolio may be a helpful part of recruitment.
e. Even when advisors have the same qualifications some advisors will have specialist topics.
f. Where someone is inexperienced, or moving into a more technical role, provide a strong mentoring/support programme.

Roles and Team Structure

a. Organisations need to think about clients' journeys through their service, and the different roles in their team. For example, an advisor role could be divided to account for formal assessment needs (DEA, Retrofit Assessors), support with grant access, support with tariffs, support with detailed measure considerations. One advisor is unlikely to have complete knowledge of all advice areas.
b. Awareness of roles and specialisms will help manage expectations and develop CPD pathways.
c. Organisations should map the customer journey beyond their service, noting where, when and how to access specialist knowledge providers (e.g. for listed buildings).

Learning and CPD format

Organisations need to join, or establish, structures which support ongoing learning. These can be internal or external. Factors for organisations to consider include:

a. Establish a developmental pathway from core competencies to topic specialism. Ensuring all advisors complete minimum/basic training in core competencies but that there is sufficient investment (time, money, and effort) available to enhance this knowledge. Deep dive topic training/briefings can be developed to respond to local context and the changing landscape.
b. Use of competency frameworks and regular skills gap assessments help advisors to flag their strengths and knowledge gaps in a practical way. Include consideration of confidence and experience, as well as knowledge. Frameworks can contain sections tailored to different expected client or property scenarios.

c. Frameworks can work alongside shadowing, mentoring and other support activities. Beyond structured training, advisors should know where to get support on topics and do not feel they are working in isolation.
d. Aim to create a safe space for reflection and a culture where advisors know the limits of their own knowledge and pursue further learning.
e. Consideration of development pathways and competency frameworks could be co-developed across local organisations to enhance opportunities for peer learning and support.

Learning and CPD topics

Below are suggestions regarding 'technical knowledge' areas which have been suggested are gaps in current qualifications:

a. Greater understanding of existing (local) buildings and their issues.
b. Practical understanding of maintenance and repair tasks.
c. Greater understanding of how lower-cost measures may be beneficial.
d. Topics relating to helping people in homes that have been poorly retrofitted., such as how to rectify failed Cavity Wall Insulation, or configuring an oversized heat pump.
e. Greater understanding of climate impacts, resilience and adaptation measures.
f. Topic deep dives named included, specific renewable technologies, heating controls and optimisation, or tariff options.
g. Potential training on technical tools, or software, which can complement existing advice delivery. For example, heat loss calculation software, or desktop solar assessments.

Wider governance

a. To enable maintenance of a strong advice team, it is recommended that in funding bids include an allowance for training. Explicitly naming the changing advice context and need for CPD, as well as the need to spend money to keep people registered and accredited.
b. Funding bodies and procurement of services need to recognize the importance of consistent funding which allows organisations to maintain teams. Short term contracts/funding results in loosing skilled people and having to train new people.