Deep energy retrofit journey chart

Use this chart to assess how to assist residents through each phase of the retrofit journey.

Stage	Key activities	Resident viewpoint and engagement
Phase 1: Identify energy-saving opportunities	The housing provider conducts inspections and surveys to identify underperforming assets and define project goals, desired energy savings and solution options.	Residents can assist in the process of understanding performance issues and be involved through small-group engagements in order to have lived, on-site experience inform project scoping and priorities.
Phase 2: Build a team	The housing provider engages professionals to address the technical aspects of the retrofit project, define construction approaches, select materials and identify equipment and system options.	Resident and staff insights into operational and lived experience can meaningfully influence design decisions, reduce unintended impacts and improve constructability and resident experience outcomes.
Phase 3: Hire contractors	The housing provider chooses a general contractor to manage sub-trades, assemble teams and carry out the retrofit work, with encouragement to consider contractors with experience working in occupied suites and offerings of community benefits through social procurement.	Residents are usually not involved in the contractor selection phase. However, they can be continuously informed through meetings and updates. In co-operative housing, residents may have the opportunity to help evaluate or select contractors.
Phase 4: Implement project	The retrofit work is actively carried out, which includes in-suite construction activities that can create scheduling conflicts, access challenges and increased pressure on interest-holder interactions.	Residents face high disruption that can be reduced through clear and reliable construction schedules, pilots to test complex systems, frequent and transparent updates and a dedicated on-site contact.
Phase 5: Verify performance	Construction is complete, new equipment and systems are fully operational and normal building operations resume while the housing provider supports the residents' transition and monitors system performance over time.	As residents adapt to the new in-suite technologies and equipment, ongoing engagement, demonstrations, user guides, troubleshooting support, follow-up communications and periodic check-ins may be needed to encourage behaviour change and improve system functionality.