Engagement planning checklist

Use this checklist to ensure each phase of the retrofit has engagement strategies planned and implemented. This planning checklist was inspired by and includes sections from ACORN Canada's Tenant Engagement Report.

Deep energy retrofit engagement planning checklist

Project phases	Yes/No
Engagement planning (Phase 1: Identifying energy saving opportunities; Phase 2: Build a team; Phase 3: Hire contractors)	
Do your planned engagement efforts follow the outlined principles?	Yes ◯ No ◯
Have you developed and completed the Resident Engagement Planning Worksheet and is it ready to provide to residents and other interest holders?	Yes ◯ No ◯
Have you given residents the opportunity to discuss performance issues and/or issues they experience, and/or to identify co-benefits they hope to achieve through the retrofit?	Yes ◯ No ◯
Have you considered the languages and culturally significant holidays of the community in which work is taking place?	Yes ◯ No ◯
Have you included moments at which to celebrate important milestones with residents, such as completion of the retrofit work?	Yes ◯ No ◯
Have you developed a pre-retrofit survey?	Yes ◯ No ◯
Engagement execution (Phase 4: Implement project)	
Is there a resident liaison or engagement team in place to address any concerns residents have?	Yes ◯ No ◯
Are residents being informed about the project's progress?	Yes ◯ No ◯
Have you reached out to all residents using some or all of the engagement tactics listed in Section 3?	Yes ◯ No ◯
Post-construction engagement (Phase 5: Verify performance)	
Have you developed a resident education/training plan on the new equipment and how their behaviours can impact energy savings?	Yes ◯ No ◯
Have you developed a plan post-retrofit to share data on energy use in the building to reinforce effective resident behaviours that contribute to energy savings?	Yes ◯ No ◯
Have you developed a post-retrofit survey that allows the housing provider to compare the differences from the pre-retrofit survey used?	Yes ◯ No ◯