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RESIDENT ENGAGEMENT TOOLKIT

for deep energy retrofits

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We are also grateful to the many housing providers, technical experts, engagement practitioners and residents who contributed their time and insights throughout the development process. Through interviews, working sessions and a resident reference group, contributors shared real-world experience from retrofit projects across Canada. This input from interested parties helped ensure the toolkit reflects the operational realities of delivering deep energy retrofits in occupied residential buildings, while centring resident experience alongside technical performance.

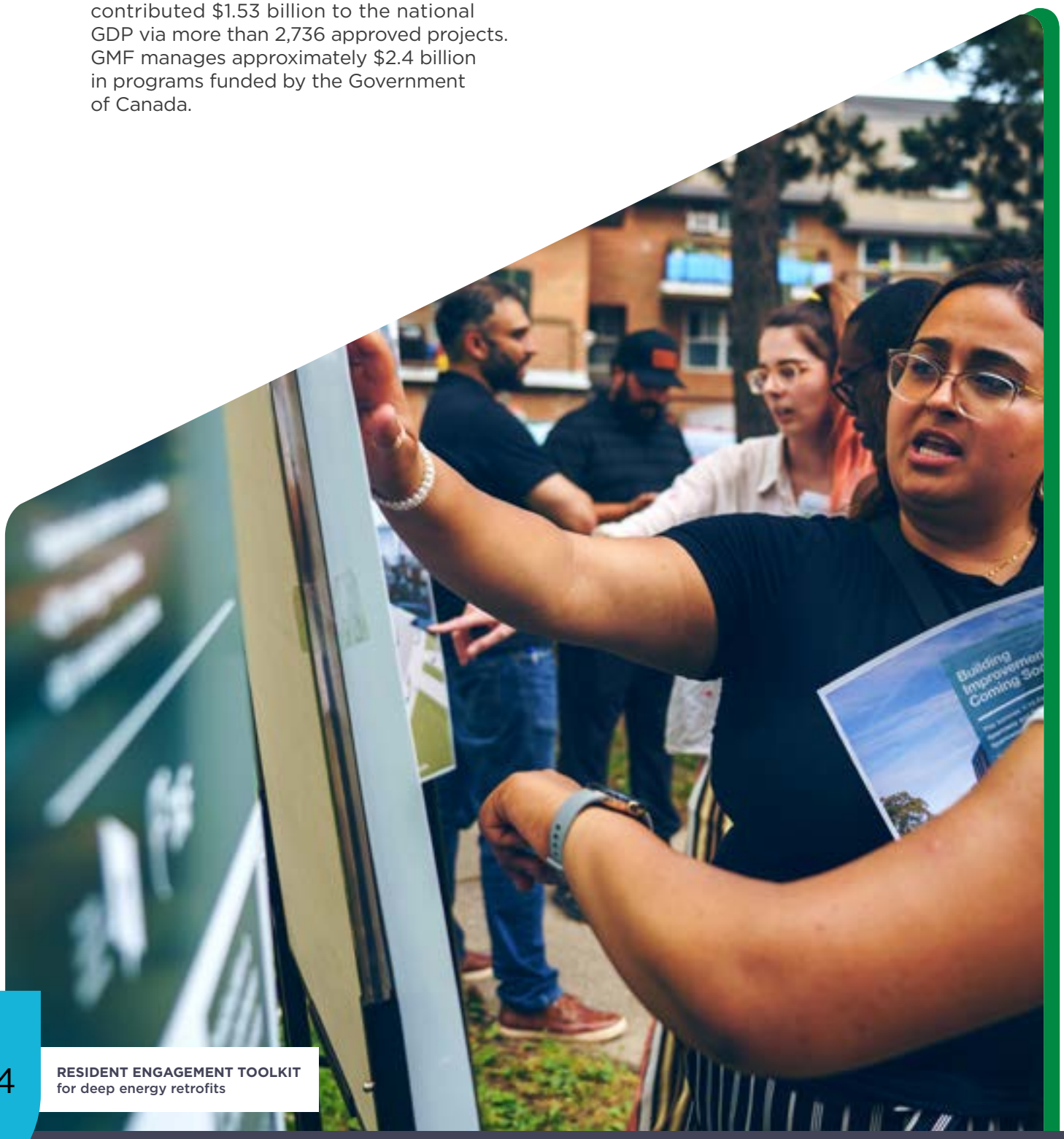
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Housing and community housing partners	Technical, construction and design partners	Resident reference group
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Developed in partnership with TAF

FCM's Green Municipal Fund (GMF) is a globally unique organization that provides funding and education to municipalities to help them both reach net-zero and build resilient communities while delivering economic and social benefits such as jobs, housing and infrastructure. Since its inception in 2000, GMF has helped reduce greenhouse gas emissions by 2.98 million tonnes, funded more than 16,000 person-years of employment and contributed $1.53 billion to the national GDP via more than 2,736 approved projects. GMF manages approximately $2.4 billion in programs funded by the Government of Canada.

GMF's Sustainable Affordable Housing (SAH) initiative enables affordable housing providers and municipalities to implement energy-efficient retrofits. The projects SAH supports aim to improve residents' quality of life by making their homes more comfortable and cost effective while reducing energy use and greenhouse gas emissions.





Section 1:
About the toolkit

This toolkit is intended for housing providers across Canada as well as the property managers, contractors, government staff and funders they work with.

Residential buildings play a significant role in Canada's transition to a low-carbon future. Many community and public housing buildings were constructed prior to 1994 and now require upgrades to remain comfortable, affordable and resilient. Deep energy retrofits such as improving building envelopes, modernizing mechanical systems and electrifying heating and hot water can reduce emissions, lower operating costs, extend asset life and improve resident comfort.

Delivering retrofit projects in occupied residential buildings can be complex. In-suite work, system upgrades and construction disruptions affect residents' daily lives and require careful coordination.

Resident engagement is a critical consideration when delivering retrofits in occupied homes. This toolkit focuses on practical approaches to engaging residents throughout retrofit projects, recognizing the unique realities of working in occupied buildings.

Ultimately, this toolkit supports housing providers and partners in delivering retrofit projects that are technically successful, financially sustainable and community centred.

The toolkit offers **practical guidance, case studies** and **tools** to help project teams:

- **Engage residents meaningfully at every stage of retrofit projects.**
- **Reduce dissatisfaction and improve the construction experience.**
- **Prioritize retrofit solutions that deliver environmental, financial and social benefits.**
- **Support behaviour change that helps sustain long-term energy savings.**



Support from GMF

Housing providers do not need to navigate retrofit planning alone. The Sustainable Affordable Housing (SAH) initiative offers pre-construction retrofit grants to support early planning and project readiness. SAH also provides capacity development supports including the Regional Energy Coach (REC) program, a free service available to affordable housing providers across Canada.

Regional Energy Coaches provide one-on-one support to help boards and staff:

- Identify project goals, priorities and energy saving targets.
- Understand retrofit options and feasibility.
- Explore funding opportunities and early stage planning supports.
- Build internal knowledge and confidence before moving into design or construction.

Approach

This toolkit was developed through a combination of background research and sector engagement to ensure it reflects the realities of delivering retrofit projects in occupied residential buildings.

The development process included:

- A review of approximately 30 existing reports, toolkits and guidelines on retrofit delivery and resident engagement.
- Focus groups and interviews with housing providers, technical experts, condominium representatives and engagement practitioners.
- A resident reference group representing diverse regions and housing contexts.
- Input gathered through a workshop delivered at FCM's 2026 Sustainable Affordable Housing Learning Forum in Ottawa.

Input from housing providers, practitioners and residents helped ensure the guidance is practical, inclusive and grounded in lived experience.





Section 2:

Foundation of resident engagement

Successful retrofit projects require more than just technical expertise. They also depend on a shared understanding of how to approach resident engagement, of what is enabled by effective engagement and of the realities of delivering work in occupied homes.

This section outlines the foundational principles that guide resident engagement, the benefits this engagement delivers and the risks of not engaging residents as well as key considerations related to working in residents' homes and understanding different tenancy contexts. Together, these foundations help housing providers plan engagement approaches that are realistic, respectful and responsive to community needs.

Core engagement principles

Effective resident engagement will depend on the community context, but it should be guided by a consistent set of principles. These principles shape how engagement is planned and delivered regardless of project size, housing type or retrofit phase.

This toolkit is grounded in **three core engagement principles** that can be applied throughout the retrofit lifecycle:

- **1 - Open and honest communication**
- **2 - Informed by the community**
- **3 - Inclusive collaboration**



1 - Open and honest communication

Clear, transparent communication is essential throughout a retrofit project, well before construction begins and long after it ends.

Effective communication means:

- Sharing information early, not just during active construction.
- Explaining the purpose, timeline and expected impacts of the work.
- Providing regular updates and opportunities for questions and feedback.

Consistent, proactive communication helps manage expectations, reduce uncertainty and frustration, and support constructive working relationships throughout the project.

In practice: At **Sundance Housing Co-operative**, early and transparent communication about costs, timelines and disruption helped members understand trade-offs and support key retrofit decisions.

2 - Informed by the community

Residents have first-hand knowledge of how buildings function day-to-day. Their input is just as important as technical assessments when planning a project.

Community-informed engagement means:

- Seeking resident input early to understand comfort issues, daily use patterns and access challenges.
- Using resident insights to inform project scope, sequencing and design choices.
- Recognizing that lived experience can surface issues not visible through technical analysis alone.

When engagement is informed by the community, retrofit solutions are more likely to work in practice and align with residents' needs.

In practice: At **Carver Place**, resident feedback during early assessments helped surface comfort issues that informed retrofit priorities and sequencing.



3 - Inclusive collaboration

Retrofit projects often involve many different players, including property staff, project managers, contractors and residents. Inclusive collaboration helps align these groups around shared goals.

Inclusive collaboration means:

- Designing engagement opportunities that reflect the diversity of the community.
- Removing barriers to participation (e.g., language, timing, accessibility).
- Creating multiple ways for residents to be involved, especially those who are less likely to participate through traditional channels.

Housing providers play a key role in setting the tone for collaboration and ensuring resident voices are meaningfully included.

In practice: Sundance's use of member working groups and advisory committees supported informed decision-making and alignment with co-op values.

Benefits of resident engagement

When resident engagement is done well, it delivers practical benefits that support project delivery, performance and long-term outcomes.

Smoother project delivery

Strong resident engagement helps retrofit projects run more smoothly by:

- Improving coordination around unit access and scheduling.
- Reducing complaints, delays and disruptions during construction.
- Freeing up staff time otherwise spent resolving avoidable issues.

These efficiencies can help projects stay on schedule and on budget.

Better-informed project decisions

Resident engagement brings lived experience into planning and delivery. Resident input can:

- Surface comfort issues, operational concerns or access challenges not captured through technical assessments.
- Highlight how buildings are used day-to-day, across seasons and household types.

This insight supports better sequencing, fewer unintended impacts and retrofit solutions that work in practice.

Stronger co-operation during construction

When residents understand the project and feel included, they are more likely to:

- Co-operate with in-suite work and access requirements.
- Share information with neighbours.
- Help identify issues early before they escalate.

This co-operation helps manage the realities of working in occupied buildings.

Improved system performance and energy outcomes

Resident engagement plays a critical role in achieving intended energy savings and greenhouse gas reductions. New systems such as heat pumps, ventilation systems and smart controls only perform as designed when residents understand how to use them.

Effective engagement supports:

- Proper operation of new equipment.
- Access for commissioning and follow-up.
- Behaviour changes that sustain long-term performance.

Without this support, even high-efficiency systems may underperform.

Risks of not engaging residents

When residents are not engaged, retrofit projects face avoidable risks that can affect timelines, costs and performance, particularly in occupied buildings.

Key risks include:

- Access and scheduling issues, leading to delays, repeated site visits and higher administrative burden.
- Increased complaints and conflicts, requiring additional staff time to resolve.
- Lower co-operation during construction, making in-suite work harder to coordinate.
- Underperforming systems, when residents are not prepared to use new equipment as intended.

Without strong engagement, retrofit projects risk becoming purely technical upgrades, missing opportunities to improve resident comfort, support long-term behaviour change and achieve full environmental performance targets.

Common challenges during retrofit projects

Past retrofit projects show that limited resident engagement increases project risks, particularly when new and complex systems are introduced.

Common challenges include:

- Operational issues that only become apparent once residents begin using new systems.
- Quality control issues discovered post occupancy, requiring disruptive follow-up work.
- Steep learning curves for staff and residents when system training is insufficient.
- Repeated in suite access during the warranty periods due to incomplete testing or unclear expectations.
- Challenges collecting performance data when expectations around unit access, surveys or data sharing were not clearly communicated in advance.

Early engagement, clear expectations and ongoing resident education can significantly reduce these challenges and support smoother project delivery.

Working in residents' homes

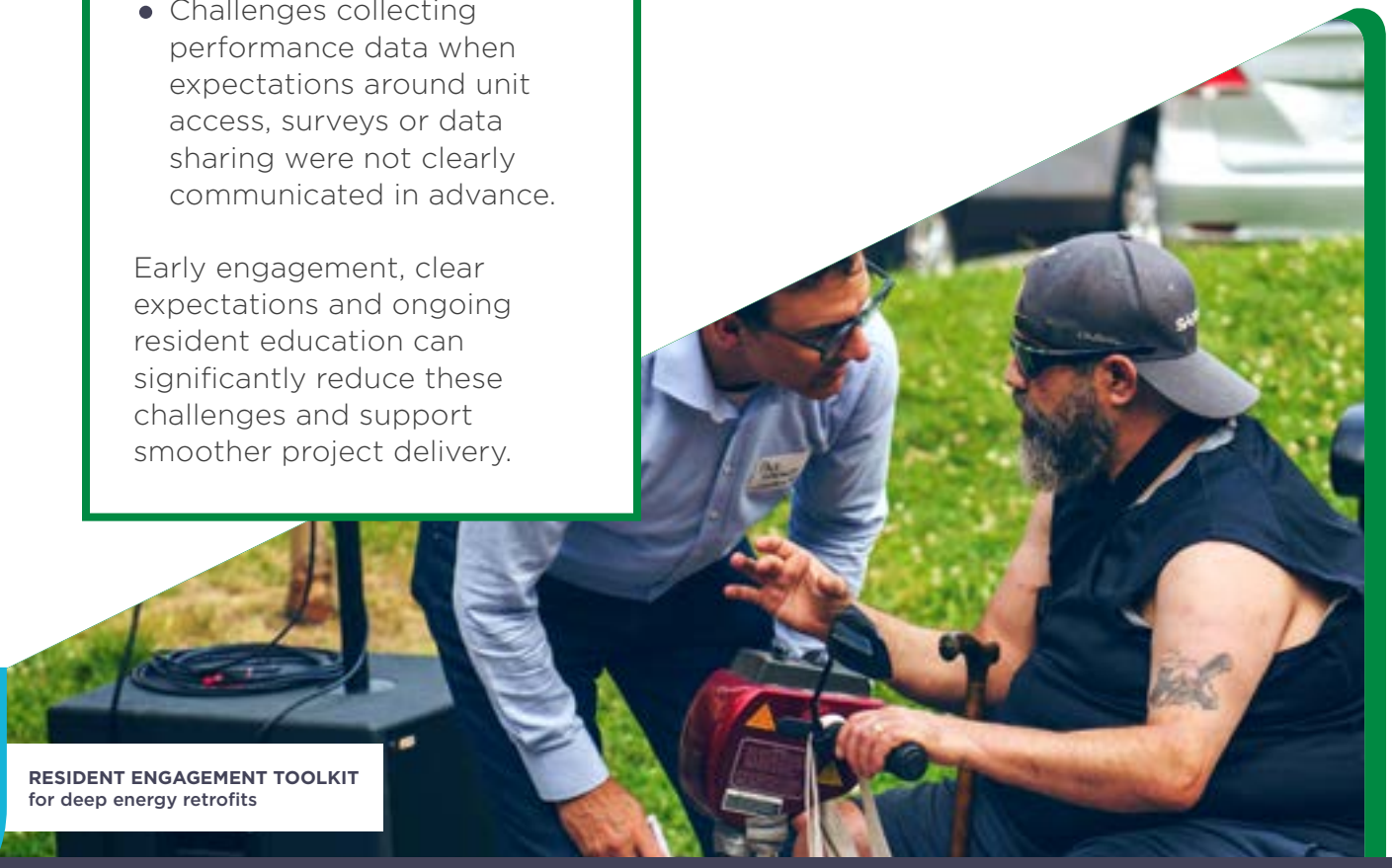
Many aspects of deep energy retrofits, such as window replacement, plumbing upgrades or HVAC installation, require in-suite work.

In-suite work can be challenging for residents due to:

- Repeated access to their homes.
- Disruptions to daily routines.
- Health, mobility or accessibility needs.
- Environmental hazards such as pests or asbestos.

Clear coordination and advance notice are essential. Engagement supports safe and respectful access by helping residents understand when workers will be in their homes and what protective measures will be used. This may include the use of personal protective equipment (PPE) such as shoe covers and masks or other precautions to protect resident health and belongings.

Planning retrofits with residents' needs in mind helps prepare them for short-term disruption, supports adjustment to operational changes and helps work proceed as planned.



Understanding resident and tenancy composition

Effective resident engagement depends on understanding who lives in the building and how they use their homes and shared spaces. While many engagement strategies can be standardized, a one-size-fits-all approach is rarely effective in retrofit projects.

When planning engagement, housing providers should consider:

- Household composition.
- Housing type (transitional, supportive, community housing, market housing).
- Cultural and language diversity.
- Accessibility needs.
- How residents interact with building systems and services.

These factors influence how residents prefer to receive information, their ability to participate in engagement activities and how retrofit work affects their daily lives.

The section below highlights common resident and tenancy contexts and the implications for engagement planning.

Newcomer and immigrant communities

Many non-profit housing communities, particularly in urban areas, are home to newcomer and recent immigrant populations.

To improve accessibility and participation, housing providers can:

- Plan for interpretation and translation services where English or French may not be the residents' first language.
- Learn about key cultural, religious and national holidays that may affect availability or participation.

Building cultural awareness into engagement planning helps reduce barriers to participation and supports stronger relationship-building.

Families, seniors, children and youth

Resident age and life stage often align with housing type and affect how people engage.

Common considerations include:

- Families and youth may have limited availability due to school and caregiving schedules.
- Seniors may have mobility considerations or prefer in person, low tech communication.

Engagement approaches should reflect these differences. Additional supports may be needed in senior oriented communities.

Accessibility

All residential communities include residents with visible and invisible accessibility needs. Mobility, sensory, cognitive or health-related considerations can affect how residents participate in engagement activities.

Inclusive engagement may include:

- Accessible meeting spaces.
- Flexible participation options.
- Targeted outreach where needs are higher.

Accounting for accessibility at an early stage helps ensure that engagement efforts reach all residents and not just those most able to participate.



Section 3:

Applying resident engagement across the retrofit lifecycle

How to use engagement tactics

Engagement tactics are the practical tools housing providers use to communicate with residents, gather input and support participation throughout a retrofit project. Most projects use a combination of approaches, adapted to the project phase, the level of disruption and the needs of the community.

The sections that follow outline how engagement tactics can be applied across the retrofit lifecycle and how they may need to be adjusted for different contexts.

Engagement across retrofit project phases

Energy retrofit projects typically move through five stages, from ideation to post-construction. At each stage, resident engagement plays a different role in supporting project success, managing disruption and realizing long-term benefits.

The **five phases below** provide a practical guide that housing providers can adapt to suit their community and project context.

- **Phase 1: Identify energy-saving opportunities**
- **Phase 2: Build a team**
- **Phase 3: Hire contractors**
- **Phase 4: Implement project**
- **Phase 5: Verify performance**



The Retrofit Journey: Engagement across all five phases

Phase 1: Identify energy-saving opportunities	Phase 2: Build a team	Phase 3: Hire contractors	Phase 4: Implement project	Phase 5: Verify performance
Resident perspective	**Resident perspective**	**Resident perspective**	**Resident perspective**	**Resident perspective**
"What problems are we trying to solve?"	"Are my concerns being considered?"	"Who is entering my home?"	"How will construction affect my daily life?"	"What has changed and what do I need to know?"
Engagement Focus	**Engagement Focus**	**Engagement Focus**	**Engagement Focus**	**Engagement Focus**
Early communication and listening to residents	Resident and staff input into project design	Transparency and setting expectations	Frequent updates, resident support	Training, behaviour change and ongoing support

A breakdown of the key activities, resident viewpoint and engagement needed is available in Appendix B: Toolkit Resources.



Phase 1: Identify energy-saving opportunities

This phase focuses on understanding building performance and resident experience and defining project targets and goals.

Key activities:

- Inspect the building to identify underperforming or end-of-life assets.
- Identify comfort issues and performance gaps.
- Define high-level retrofit goals and energy-saving targets.

Engagement focus:

- Use a pre-retrofit survey or engage a small group of residents early to surface lived-experience insights (e.g., comfort and/or seasonal issues or daily use patterns).
- Use resident input to help inform project scope and priorities.

> In housing co-operatives, resident engagement begins early. Members typically vote on major financial, governance and operational decisions, so information sessions and member meetings should be held early to support informed decision making.
>
> In non-profit housing, information sessions and meetings may occur later in the process, once funding and project direction are clearer.

Phase 2: Build a team

Once the decision to proceed is made, housing providers assemble a team of professionals, such as a project manager and technical experts.

Key activities:

- Engage architects, engineers, energy specialists and planners.
- Define construction approaches and sequencing.
- Select materials and equipment.

Engagement focus:

- Use small working groups or resident liaison committees to test assumptions and reduce unintended impacts.
- Validate how proposed solutions will affect daily routines and comfort through targeted feedback sessions.
- Where direct resident engagement is limited, draw on property management, operations staff and front-line service providers to better understand resident needs and past challenges.

Phase 3: Hire contractors

This phase involves selecting a general contractor to manage trades and deliver the retrofit work.

Key activities:

- Select general contractor and coordinate sub-trades.
- Finalize construction methods, schedules and site logistics.

Engagement focus:

- Keep residents informed through meetings, newsletters and project updates.
- Prioritize contractors with experience working in occupied suites and strong communication practices.
- Consider opportunities to deliver additional benefits to the community through contractor selection, a practice often referred to as social procurement.

Social procurement is an approach to intentionally contract with social enterprises, social contractors and diverse-owned businesses, resulting in co-created benefits for the local community. In retrofit projects, this can mean working with contractors who hire locally, offering training or apprenticeships to people facing employment barriers, or creating other community benefits alongside the construction work.

For more, explore TAF's Social Contracting Guide

Phase 4: Implement project

This is the most disruptive phase for residents and requires strong coordination and communication.

Key activities:

- Carry out retrofit work, including in-suite construction.
- Coordinate schedules, access and quality control.
- Introduce pilots to test more-complex systems before full rollout, where feasible.

Engagement focus:

- Use resident input to optimize schedules and access arrangements, especially in buildings with accessibility considerations.
- Assign a dedicated on-site contact to coordinate unit access, respond to questions and address concerns in real time.
- Share clear and reliable construction schedules.
- Provide frequent, transparent updates to reduce delays and missed appointments.
- Introduce residents to new equipment and technologies that will be installed as part of the retrofit at this stage.

Case study example: At **Carver Place**, piloting the retrofit in one occupied and one unoccupied unit helped residents understand what to expect and built momentum ahead of full construction.

Phase 5: Verify performance

After construction, engagement focuses on helping residents adapt to new systems and supporting long-term performance.

Key activities:

- Complete construction and return to normal operations.
- Monitor building performance.
- Address warranty issues and fine-tune.

Engagement focus:

- Help residents understand how new systems function and why certain behaviours matter.
- Reinforce key behaviours through emails, newsletters and on-site resources.
- Provide system demonstrations, plain-language user guides and troubleshooting support.
- Conduct periodic check-ins to identify issues early and support long-term performance.

Case study example:
Follow up education and Q&A sessions at **Sundance Housing Co-operative** supported resident adjustment to new systems and reinforced energy saving behaviours.

Engagement tactics menu

Housing providers can draw from a range of tactics when planning resident engagement activities. The list below provides an overview of commonly used approaches. Tactics are most effective when combined and adapted to suit the community and project stage.

Common engagement tactics include:

- Community meetings: Group sessions to share information and explain upcoming work.
- Door-to-door visits: Direct outreach to share information and identify concerns.
- Flyers, posters and noticeboards: Printed materials for updates in common areas.
- Lobby intercepts: Informal conversations with residents in shared spaces.
- Surveys (paper or digital): Structured tools to gather resident feedback.
- Digital communications: Emails, websites or newsletters for timely updates.

Use the templated worksheet in Appendix B: Toolkit Resources to support planning and mapping of the various engagement activities.

Resident liaison roles

Some retrofit projects benefit from assigning a resident liaison to support communication and coordination between residents, housing providers and construction teams. This role is particularly valuable during project implementation.

Resident liaisons may be resident volunteers, residents hired into a temporary project role, housing provider staff or contractor supported positions. Typical responsibilities may include sharing project updates, supporting unit access scheduling and helping to address questions or concerns as they arise.

Some funding programs may allow resident liaison wages or honoraria as eligible project costs, which can help strengthen engagement while keeping costs manageable.

Case study example: Dedicated engagement supports played a key role in supporting communication and coordination during retrofit implementation at **Field and Tree Sparroway**.



Insights for condominiums: What's different

Condominium retrofit projects are shaped by owner governance, board decision making and formal financial approvals. In this context, resident engagement is less about managing day to day disruption and more about supporting informed decision making, clear communication and long term buy in.

Key engagement considerations in condominiums:

- Engagement is primarily with boards and unit owners, often through formal decision points.
- Financial impacts, reserve funds and fee implications strongly influence owner support.
- Early technical and financial clarity is critical in building confidence and momentum.

Across the retrofit lifecycle, engagement should focus on building a shared understanding of options, costs and trade offs early in the process; maintaining consistent, owner facing communication through established property management channels during implementation; and supporting post construction system use through simple guidance and long term reference materials.

Takeaway: Successful condominium retrofits depend on aligning technical solutions with board leadership, transparent communication and sustained owner confidence.





Conclusion

With the right supports in place, housing providers can plan, communicate and implement retrofit projects with greater confidence. The **Sustainable Affordable Housing (SAH)** initiative offers funding and capacity development to help housing providers at the early stages of their retrofit projects. **SAH's pre-construction retrofit funding** can support planning activities including the development of **resident engagement strategies** and project readiness work.



Housing providers are encouraged to explore SAH's resources, which are designed to **support retrofit projects at every stage of the journey**. They include:

- **The Sustainable Affordable Housing resource library**, a curated collection of guides, case studies and tools to support retrofit and new build planning and delivery
- **Understanding energy efficiency: A guide for housing providers**, to build foundational knowledge and internal alignment
- **Making the case for energy efficiency to your board and funders**, a practical factsheet to support decision making and buy in
- **The Sustainable Affordable Housing funders list**, a curated and regularly updated list of funding opportunities from across Canada
- **The Regional Energy Coach program**, which provides free one on one coaching to housing providers throughout the lifecycle of a retrofit project

Appendix A:

Case Studies

Toronto Community Housing Corporation's Field and Tree Sparroway (Ontario)

Project overview

Field and Tree Sparroway is a community housing townhouse complex in north Toronto serving approximately 175 families. Toronto Community Housing Corporation led a multi measure deep energy retrofit in partnership with The Atmospheric Fund (TAF) and Turner Construction Company.

Engagement approach

- Conducted a pre retrofit resident survey to understand comfort issues and establish a baseline.
- Used community events and informal gatherings to share plans and build awareness.
- Provided regular project updates through notices, schedules and direct outreach.
- Coordinated in suite work with added on site support to increase resident comfort.
- Delivered post retrofit education on new systems and energy saving practices.

Key outcomes

- High levels of resident satisfaction with construction and repairs.
- Strong understanding of retrofit benefits among residents.
- Positive feedback on contractor conduct during in suite work.

What others can learn

Early surveys and consistent communication helped align retrofit delivery with resident needs and supported cooperation during construction in an occupied community.



Multifaith Housing Initiative's Carver Place (Ontario)

Project overview

Carver Place is a townhouse community in Ottawa providing rent geared to income housing for 63 families. Multifaith Housing Initiative led a deep energy retrofit in partnership with EnviroCentre.

Engagement approach

- Began engagement early in planning, with ongoing communication throughout the project.
- Used a pilot retrofit in one occupied and one unoccupied unit to show residents what to expect.
- Created opportunities for residents to ask questions and share feedback before full rollout.
- Continued communication during construction to support access and coordination.

Key outcomes

- Increased resident understanding of retrofit impacts and benefits.
- Reduced uncertainty and improved readiness ahead of full construction.
- Reliable heating and cooling, lower energy use and improved comfort.

What others can learn

Piloting retrofit work in a small number of units can build trust, help residents visualize changes and support smoother implementation at scale.

Sundance Housing Co-operative's retrofit (Alberta)

Project overview

Sundance Housing Co-operative is a townhouse community in Edmonton. The co-operative completed a comprehensive deep energy retrofit of its 59 original units to improve building performance and transition away from fossil fuels.

Engagement approach

- Held early resident information sessions to explain retrofit goals and options.
- Used member working groups and advisory committees to support decision making.
- Shared information transparently about costs, timelines and disruption.
- Provided regular updates during construction and clear points of contact.
- Delivered post construction education and follow up on new systems.

Key outcomes

- Strong resident understanding and support for major retrofit decisions
- Smoother coordination during construction in an occupied co-op setting
- Improved comfort and long term building performance

What others can learn

In co-operative housing, early and ongoing engagement supports informed voting, shared ownership of decisions and successful delivery of complex retrofit projects.

Appendix B: Toolkit resources

Resident engagement planning worksheet

An effective resident engagement approach uses a mix of tactics tailored to the specific community, recognizing that residents differ in demographics, needs, preferences and familiarity with retrofit projects.

Use the Resident Engagement Planning Worksheet to plan resident engagement approaches across different project phases.

Use the Engagement Tactics Menu and definitions as a resource of options that can be combined and adapted for the most effective engagement effort for the community.

Resident engagement planning worksheet: Energy retrofit projects

Stage	Engagement tactic	When will this happen?	Who is responsible?	What does success look like?
Phase 1: Identify energy-saving opportunities	Please select one or multiple from the engagement tactics menu			
Phase 2: Build a team	Please select one or multiple from the engagement tactics menu			
Phase 3: Hire contractors	Please select one or multiple from the engagement tactics menu			
Phase 4: Implement project	Please select one or multiple from the engagement tactics menu			
Phase 5: Verify performance	Please select one or multiple from the engagement tactics menu			

Engagement tactics menu: Community celebrations or milestones; Community champions/peer leaders; Community meetings; Construction leads on committee; Door-to-door unit visits; Flyers, posters, noticeboards; Focus groups or discussion circles; Kickoff events; Lobby intercepts; One-on-one support for vulnerable residents; Project website or updates page; Resident liaison (project-based role); Social media or messaging groups; Surveys (paper or digital)

Table 1: Engagement tactic menu and definitions

Engagement tactic	Description	Example
Community meetings	Sessions held within the project building or a neighbouring space to share updates, explain upcoming work and gather resident feedback.	Monthly meetings in a common room to walk through retrofit timelines and answer questions.
Community celebrations for milestones	Events that recognize key project achievements in order to build trust, maintain momentum and create a positive shared experience.	A small event that brings members of the community together after completion of major upgrades.
Community champions/ peer leaders	Trusted residents who help share information, answer questions and encourage participation.	Two to three residents identified per building to support outreach efforts.
Construction leads on committees	Including construction or project team representatives on resident committees, helping to improve transparency.	A contractor attends resident meetings to provide updates.
Door-to-door unit visits	Direct outreach to residents to share information and identify concerns.	Staff visiting units ahead of construction.
Flyers, posters and noticeboards	Printed materials placed in high-traffic areas for updates.	Posting updates in elevators and lobbies.
Focus groups or discussion circles	Small group conversations that allow for deeper feedback.	Facilitated session on heating system comfort.
Kickoff events	Celebration and information-sharing event introducing or starting the project.	Hosting a launch event with the project interest holders.
Lobby intercepts	Informal conversations in common areas.	Staff speaking with residents in the lobby of the building.
One-on-one support for vulnerable residents	Tailored support for residents with barriers.	Providing translation or individualized walk-throughs.
Project website or updates page	Centralized online space for updates.	A web page with timelines and FAQs.
Resident liaison (project-based role)	A temporary role that supports communication and coordination between residents, housing providers and construction teams during a retrofit project.	A resident or staff member is hired and/or assigned to share project updates, support unit access scheduling and help address resident questions or concerns during construction.
Social media or messaging groups	Digital channels for quick updates.	WhatsApp group for residents.
Surveys (paper or digital)	Tool used to gather structured feedback.	Short survey on satisfaction with upgrades.

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.

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 ◯

Pre- and post-retrofit survey

This survey helps housing providers understand residents' experiences in their homes, including comfort issues, operational challenges and other day-to day concerns. It can be used before a retrofit to identify priorities and inform planning, and after a retrofit to understand what has changed and where additional support may be needed. The survey can be adapted to suit local needs, with questions added or removed as appropriate.

Download the Pre- and post-retrofit survey from the Resident engagement toolkit webpage