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.