|  |  |
| --- | --- |
| Who is this tool for? | Co-owner who wants to create support for retrofitting  Project team  Retrofitting coach |
| What is the purpose of this tool? | This tool will help to ensure that you communicate effectively about the retrofitting project throughout all phases. Cooperation among residents is needed to make the project a success. |
| How to use this tool? | After some general information you will see the important steps to consider for proper communication. Then you can choose which phase you want to look at in detail:   * Before the retrofit * During retrofit * After the retrofit |
| Next steps | Communication is **ongoing** though all phases of a retrofit process, and is vital for a successful voting procedure. |

Communication within the project team, with your fellow residents and with external stakeholders is essential for the success of your retrofitting project. It is of key importance to understand the needs of your fellow residents and to reply to their needs. It is also of key importance to understand which external stakeholders are important to communicate with, and how to communicate with them. A good division of roles should be made within the project team and this should be clearly communicated to your fellow residents. Residents should know who to go to for their questions and project team members should know what their roles are. Ensuring a smooth communication process will build trust among the residents; unclear communication from the project team towards the other residents could result in uncertainty and mistrust. Communication is essential for a successful [voting procedure](#voting)!

A communication plan can be set up following the steps mentioned below. This plan assists the project team throughout the project to ensure effective communication with its fellow residents. The size of your condominium plays an important role. The smaller the condominium the easier the communication is perceived to be, however following these 6 steps is always advised so that you can always fall back on the plan.

1. **Who are the residents**
2. **Determine topics for communication**
3. **Information needs**
4. **Communication methods**
5. **Timing**
6. **Responsibilities**

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[General information about each step](#general_information)

[Communication steps preparing for the retrofit](#before_retrofit)

[Communication steps during the retrofit](#during_retrofit)

[Communication steps after the retrofit](#after_retrofit)

[The top tips](#top_tips)

**General information on each step**

Analyze the composition of your condominium. To ensure effectivity of your communication methods it is necessary to understand the composition of your condominium. When the majority are elderly it is most certainly not a good idea to use an app to communicate.

The timing of communication is important for the engagement of all residents. With this we mean that information should not be provided too early in the process. Residents can become confused by this and this confusion could lead to rejection of the project. Matching the information needs with the appropriate communication methods at the right time will help to assist in increasing the engagement of the residents. Throughout the process things will often change but following these steps, mapping sensitive residents and ensuring their comfort, are important factors in limiting the negative effects for them. Make sure that there is not too much communication, because this could also overwhelm residents and hamper progress.

Divide roles within the project team and communicate these roles to all residents. Residents should know who to address when they have questions. Clearly defined and communicated roles will result in better information distribution and can prevent misunderstanding. The person in charge of a specific topic should be familiar with the information to prevent possible distribution of wrong information.

**Timing**

**Responsibilities**

**Who are the**

**residents**

**Communication methods**

Choosing your method of communication based on the type of residents and their information needs will result in a more suitable fit. Combining two communication methods is most often preferred, however this also depends on the size of the condominium and the wishes of the residents

**Information**

**needs**

Asses the information needs of all residents. Some residents prefer to be updated every few days and others only want to be contacted when necessary. It is important to create an overview of the information needs of each resident and take considered decisions regarding communications based on the wishes of the residents

Before anything is communicated to your fellow residents all topics that are important to inform your fellow residents about, should be determined. New topics can be added throughout the project; a good overview of the relevant topics provides structure and will ensure a complete message to your fellow residents.

**Determine topics for**

**communication**

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Divide roles within the project team and communicate these roles to all residents. Residents should know to whom they have to go with their specific questions. Clearly def and communicated roles will result in better information distribution and can prevent misunderstanding the answers that are provided. The person in charge of a specific topic or all communication efforts with the residents should be familiar with the information to prevent possible distribution of wrong information.

The timing of communication is important for the engagement of all residents. With this we mean that information should not be provided too early in the process. Residents can become confused by this and this confusion could lead into a reluctance towards the project. Making a time plan with all events and the most suitable communication methods will assist in increasing the engagement of the residents. Throughout the process things will often change but following the steps and mapping sensitive residents and ensuring their comfort is an important factor in limiting the negative effects on them. Make sure that there is not too much communication, because this could also overwhelm residents and hamper the amount of work that is done by the project team.

**Responsibilities**

**Timing**

|  |  |
| --- | --- |
| Before the retrofit |  |
| Who are the residents | Create an overview of all residents within the condominium (e.g. age, children, time at home). See [communication/residents inventory](#Inventory). Comfort sensitive residents and make sure to spend extra time to inform these residents. Nuisance (noise, dirt, etc.) is an extra important consideration for these residents to oppose a retrofitting project, therefore extra attention is advised to make sure these residents are comforted. The frequency in which information is provided is important to maintain the attention of all residents (see information needs). |
| Information needs | Create an understanding of the frequency of communication which is preferred by the residents. Present all relevant information in such a way that it is understandable for everybody, but do not oversimplify information as this could be counter-effective. For example: Break down financial information in a simple but still detailed way, such as   * Roof improvement: Labor € 30.000, - * Material € 20.000, -.   In the project plan the financial information should always be provided in a more elaborate way, however this is often irrelevant to residents. Interested residents should always be given the freedom to request more in-depth information. Pay special attention to residents who are reluctant for change and collect their arguments against the project. |
| Determine topics for communication | Before the start of the retrofit a list of important topics should be created. This list will assist the project team in the preparation of the project, ensuring that all important topics are discussed with the residents. [Click here](#_Communication_per_retrofitting) |
| Communication methods | [Choose your method of communication](#_Communication_methods)  Several physical information meetings are most effective for informing all residents and creating an understanding of the views of all residents. These physical meetings can be done in various forms, but most effective is a presentation with a combination of visual information (PowerPoint or posters), and leaflets with the most important information. Experts should be included in the early stages of the project, because this builds trust and more specific questions can immediately be asked to these experts. You will most certainly have to deal with skeptical residents, who will criticize the project. It should always be made clear that their criticism is very important and that these questions should always be made. Next, in treating their questions ensure that unambiguous answers are provided. When you are not sure what to answer, say that you will try to find the answer and provide it later-on. |
| Timing | Before the retrofit is decided it is very important to inform all residents in a very extensive way. Plan extra meetings to pay special attention to reluctant residents. The timing depends on the availability of experts and other relevant stakeholders and of the official timeline related to the decision taken at the General Meeting. |
| Responsibilities | Divide clear roles within the project team, so that everybody has their task throughout the project and communicate this to all residents. |

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|  |  |
| --- | --- |
| During the retrofit |  |
| Who are the residents | Give extra attention to sensitive residents (e.g. elderly, families with small children, limited ability/mobility). These sensitive residents should be monitored closely, so that they are well-informed about the project and they can receive extra help when needed. For example, when some areas of the building are closed for construction and they need assistance in moving around. These residents, the project team, and the project partner should cooperate closely to ensure good accessibility to the building for all residents at any time. Every major event in the construction process should be communicated to all residents in time, this means that everybody should know what will happen in the building at the very least a week prior, but sometimes earlier. Sensitive residents should be informed more in-depth on events that could impact them in any way, such as limiting their accessibility for an x amount of time. Comforting them and making sure they will be able to get for example their groceries is very important. |
| Information needs | It should be clear to residents which person can be contacted to get more elaborate information concerning the project. The information needs to differ from person to person, for example one person can expect or require more explanations than another person. The project team should be flexible in providing information to residents. Requested information should be provided to the residents in a clear and coherent way and transparency should be the guiding principle. In case major issues arise, be prepared to set up a meeting with the builder and the residents. |
| Determine topics for communication | Emerging topics should be discussed within the project team and if necessary, communicated to residents. [Click here](#_Communication_per_retrofitting) |
| Communication methods | [Choose your method of communication](#_Communication_methods)  During the retrofit it is important that all residents are constantly updated. This can be done in various forms. Online information sharing platforms, whatsapp groups, meetings, email or leaflets that are placed in an easily accessible space (e.g. the elevator, next to the mail boxes) are all examples on how residents can be updated. A ‘simple’ WhatsApp group is also an option. Important for this is the preference of the residents and their need for information. The size of the condominium and preference of the residents highly influences the most effective method. Organize a meeting when big constructions are planned to inform all residents and gather concerns from them, so that these concerns can be discussed with the project partner. |
| Timing | Residents need to be updated throughout the retrofitting process to ensure the support in the project and to keep them in the loop. Inform about all potential disturbances during the renovation process (e.g. noise, dirt), but give clear indications about the scope (e.g. noise from the backyard between 7:30 – 18:00 Mon – Fri). Create weekly or bi-weekly newsletters in which all residents are updated on all the progress, even if it is not visible progress. Be transparent throughout the whole process to prevent trust issues or disbelief in the future of the project. |
| Responsibilities | Make sure that everybody knows their roles throughout the retrofit and communicate any changes to the residents. In this way the transparency is guaranteed, and the residents trust the project team. |

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|  |  |
| --- | --- |
| After the retrofit |  |
| Who are the residents | Asses the happiness of the residents concerning the retrofit. Gather complaints and try to fix these in cooperation with the project partner. Try to gather lessons for other retrofitting processes so that the project can also function as a learning experience to others. |
| Information needs | Provide the residents with the final update of the project. Hereby providing information on the overall costs, energy savings, complaints, and future events. It could be beneficial to include the project builder in the final update. The builder could provide practical knowledge on the maintenance of the constructions and in providing an overview of what is done. |
| Determine topics for communication | Important topics which should be discussed after the retrofit should be decided upon. [Click here](#_Communication_per_retrofitting) |
| Communication methods | [Choose your method of communication](#_Communication_methods)  Organize a final meeting in which the project is completed, this could also be the “official” opening of the retrofitted building. Ask the experts to present the final result of the project and any important points of attention. Make sure to have a meeting a year later too that discusses the energy savings and comfort increase. |
| Timing | A final meeting/ feedback meeting should take place after 6 months- 1 year to assess the acceptance of the retrofit, the energy savings and happiness of the residents. |
| Responsibilities | Let every team member debrief the residents about their specific subject, so that everybody gets this information from the person which they trusted throughout the project. |

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TOP TIPS

**Top tip!**

Organize at least two physical information meetings for all residents before the project starts to map the composition of the condominium, the information needs from all residents, and to inform them about the key information (click for communication inventory list).

**Top tip!**

Plan weekly meeting to decide upon the most important topics that should be communicated to the residents.

**Top tip!**

Make an inventory of the residents that need extra attention based on their age, family situation or any other special circumstance.

**Top tip!**

Place an information board on a central location within the condominium, such as the elevator. Update this information board on a regular base, so that residents are always aware of the developments

**Top tip!**

Indicate all project team member and their corresponding roles on the information boards, so that residents always know which team member to contact with their specific questions.

**Top tip!**

Create a weekly or bi-weekly newsletter in which residents are updated and relevant information is shared. This will create set timings of communication to your fellow residents. Make sure that residents know when next newsletter will appear, so that unwanted and uncontrolled communication is prevented.

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# Example of a communication/residents inventory

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Name | Apartment N° | Age (+ small children, special needs) | Time at home | Preferred communication method | Information frequency | Position in retrofit |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |
|  |  | …. Yes/no,.... | All day/evening/other…. |  | Weekly/bi-weekly/monthly | In favor/against/neutral |

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# Communication per retrofitting step

|  |  |  |
| --- | --- | --- |
| **Pre-retrofit** | **During retrofit** | **Post-retrofit** |
| For example: Provide information about the plans of the project and the possible impact it will have…………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………… | For example: Communicate a week prior to important events such as big shutdowns of certain areas of the building……..……………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………… | For example: De-brief all residents about the final result of the project, including costs…..……………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………… |

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# Communication methods

|  |  |  |  |
| --- | --- | --- | --- |
| **Medium** | **Explanation** | **Pro** | **Con** |
| **Physical meeting (essential)** | Meetings in which all residents are gathered and in which a large amount of information is provided or in which a difficult subject is discussed. | Provide immediate feedback from residentsOffers the opportunity to | Time-consuming and require alignment of schedules, so never useable as a sole option |
| **Email** | Email could function as method through which updates to the residents are provided or through which newsletters are distributed | Quick and easy | Might be a problem for older residentsDifficult information could also result in more questionsCan get unstructured |
| **Leaflets** | Leaflets should explain difficult or specific information. On the one hand to convince residents and on the other hand to inform residents about steps in the project. | Can be placed in the mailboxesEasy to provide information in an easy to read format | Not suitable for extensive explanationsNo control over the fact that residents read it.Preparation time |
| **WhatsApp group** | A WhatsApp group can function to provide small updates to residents or within the project team. | Quick and easy | Might be a problem for older residentsCan get unstructured |
| **Personal visits** | Personal visits to residents to offer personal advice or to offer special attention. | Easier to personalize informationDirect feedback | Time consuming |
| **Information board (advised)**[**Example, click here**](#_Example_information_board) | An information board on a central location provides all relevant information and updates on the project’s progression. In the early stages it could provide best practice materials and explanations about the savings that can be achieved. | Easy to provide information which is accessible to everybody | No control in who reads itNo direct feedback |
| **Newsletter**[**Example, click here**](#Newsletter) | A newsletter provides an update on the progress of the project and is most relevant throughout the retrofitting process. | Easy to update residents on upcoming meetings or special activities | Preparation timeOnly to update about progression, so not suitable for extensive explanations |

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# Example information board



# Source: <http://www.wmep.org/wp-content/uploads/2015/01/Chuck.jpg>

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# Example Newsletter:

# Click on image for free templates.

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**VOTING PROCEDURE, to be found at:**

# 