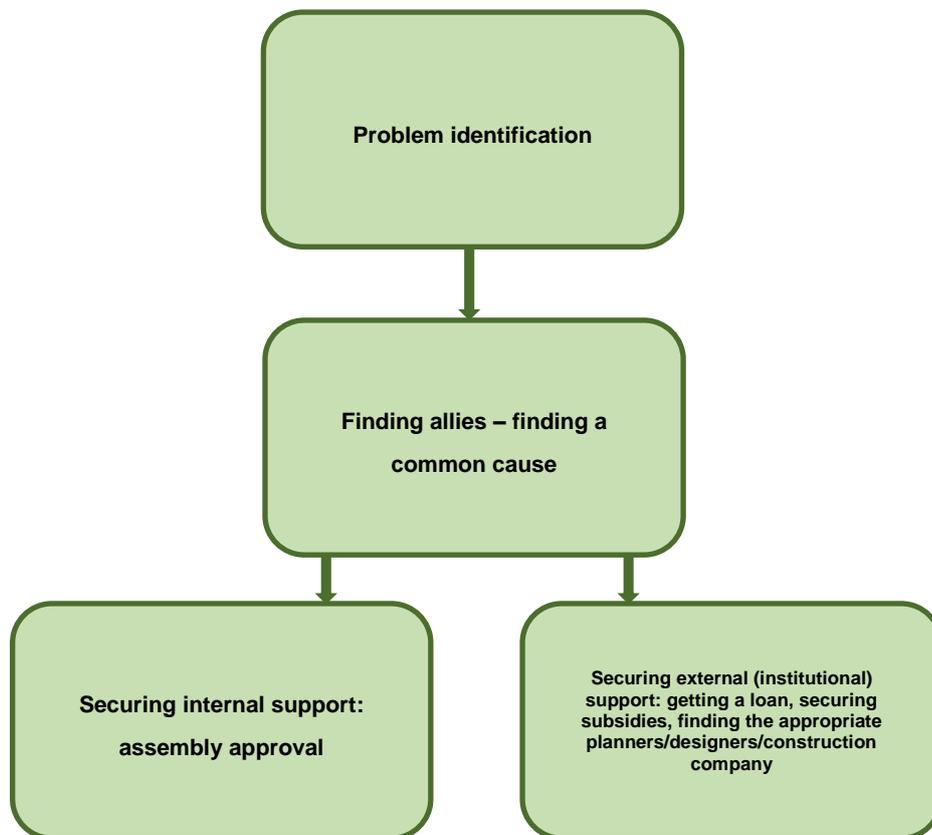


## Step-by-step guide for initiating the end-user-led refurbishment process

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### The three-stage model of end-user-led process initiation

the following steps show the main stages of initiating a refurbishment by end-users – typically owners in a condominium – and lists the most important questions and problems that the initiators should focus on in order to successfully start a refurbishment process.



### 1. Problem identification

**By whom:** The advantage of end-user-led processes is that the initiation can come from any member of the community – typically an active owner in the condominium/cooperative.

**Questions to ask:**

- What are the biggest problems in the building? What bothers me as an owner and what bothers the others?

- How does the physical state of the building compare to the physical state of the other buildings in the neighbourhood? If it is worse, what are the biggest differences?
- Is there any problem that results in excessive spending? Is there a possible area of improvement that would result in saving on expenditures?
- Is there need to improve the outlook of the building?
- Is there a specific type of investment that will likely be supported by the majority of owners?
- Is there state/local funding available for refurbishment aims? Could the home owners association (HOA) qualify for this?

**Expected results:** A (short) list of possible interventions that are presentable to the building manager/elected building officials, and from then on can be discussed further with them

## 2. Finding allies – finding a common cause

**By whom:** Typically a member of the HOA – who can also be an elected official within the HOA – tries to seek out the support of other owners and the support of the building manager/the management company. It is also possible that the manager – in consultation with a few owners – comes up with the idea of refurbishment.

### Questions to ask:

- Is the manager interested in taking up the cause? How can he be made interested? (See the argumentation tools for managers for concrete ideas under the “persuasion” button)
- Which owners could be interested in the refurbishment and why? Is there a forum where they can be reached and talked to? (Anything goes: chats, phone calls, short discussion in the staircase, an organised event, etc.)
- Do most owners have the appropriate resources to finance the refurbishment? What is the possible level of payment raise that could be acceptable to the majority of them?
- According to the manager/management company does the building have sufficient resources to start an intervention?
- Would a complex renovation be feasible? Or can a step-by-step solution be employed, by creating a detailed refurbishment plan and stretching the interventions out over the years?
- Is their one type of investment that can garner the most support?
- Would the investment help the building to: save money/to have a higher comfort level/to look better/to stand out from the neighbouring buildings/to catch up with the neighbouring buildings

**Expected results:** One or two types of interventions that are reasonable to be carried out and can be brought in front of a general assembly, and can be turned into a real refurbishment project. At this point the building manager has to be convinced and be able to prepare basic document about the suggested interventions, with possible costs and pros and cons.

## 3. Securing internal and external support

**By whom:** These parallel processes are best led by the manager/management company of a building. In case of gathering external support often a consultancy company can be good

### Questions to ask:

#### Internal support

- How can the assembly approval be best secured for the selected intervention? (For methods and tools please see the argumentation tools for end-users under the “persuasion” button)
- Has the opinion of the different groups within the building been listened to/incorporated into the plan?
- Have the households with the most decision making influence – ownership share, degree of influence on the opinion of the other residents, organisational capacity – been convinced of the usefulness of the project?

- What are the most important documents that have to be presented in front of the assembly to promote decision making? Have they been appropriately prepared?

**External support**

- Is there a consultancy company that can be hired and would be able to coordinate the entire refurbishment process? Would its costs be acceptable to the owners?
- What types of bank loans are available? Which bank has the best history in supporting refurbishments?
- What types of subsidies are available? What are the conditions? How can the building apply? (For financial guidance about the list of possible financing solutions please check the document under the “project initiation” button)
- What construction companies are known in the field? Which offer has the best price-value ratio? Who can deal best with the owners?
- What procurement options are for the refurbishment process? (Please check the documents under the “execution” button about procurement and contract options.)
- What planning companies are available in the field? Which have the best reputation for value-price ratio?

**Expected results:** a document detailing intervention possibilities and offers for loans/construction/consultancy/subsidy application – whichever is appropriate – that can be voted on by the assembly