

National Energy & Environment Data Specification

D. Engagement

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Version 001

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Term	Description
DNO	Distribution Network Operator
ITT	Invitation to Tender
NEEDS	National Energy Environment Data Specification
UPRN	Unique Property Reference Number

Stakeholder Engagement

Unless a purely desk-based plan is commissioned, stakeholder engagement is often considered a key and critical element of any planning development. Consideration should be given to the following items:

- The need to bring local stakeholders on the journey for buy in to the planning process
- Credible sources of local knowledge, data, and pipeline information
- Prospective investors for pipeline
- Internal stakeholders to consult on the benefits of the plan to the local authority.

Often in practice the expectation on stakeholder engagement, how it is to be implemented and which party owns the process is lacking in commissions. This leads to ambiguity and can then lead to issues of quality, delays, and cost. It is therefore important to be clear on these requirements from the outset. In support of this an engagement plan is recommended.

Forming a Stakeholder Engagement Strategy

The following aspects of stakeholder engagement are linked back to the NEEDS process steps¹:

1. **Objective:** frame the study to bring in priorities from stakeholders, supporting buy-in from the outset
2. **Modelling requirements:** integrate relevant stakeholders local knowledge to the analysis, improving relevance and credibility
3. **Data outputs:** define outputs, type, and format of insights that stakeholders should act on
4. **Reporting and dissemination:** be clear on how findings are to be communicated and used, ensuring the study drives informed decision and continued engagement.

Considering the Type of Engagement, Data Required and Setting Expectations

Engagement is important to shaping a meaningful and relevant study but can come with **significant cost implications**. Consideration should be given to the method, timing and volume of activities including:

- **Number of and duration of workshops** (and how these will be facilitated)
- **Calls to stakeholders** – how many, ad hoc, focussed, milestone linked, format
- **Management of expectations** – dedicated sessions for communicating to stakeholders during or post process to manage their expectations and secure buy in
- **Data collection** – obtaining data and information to bring into the planning process and improve accuracy
- **Integration and play-back of results** - disseminating outputs during the process and afterwards with a consideration on format and method.

How much ownership of this process is the responsibility under the local authority and how much is expected from the delivery party should be made clear with a specific reference to the budgetary allocation where possible. When framing engagement and expectations within an ITT it is important to consider **format and frequency of engagement**.

¹ NEEDS specification setup

Items to consider include:

- Where one-to-one meetings are preferred, it is important determine when these should occur, including with internal departments and the timing of these so as not to inhibit the planning process
- In person tends to be most suitable with target stakeholders and at key strategic points. This can include at the end of a project, a major midpoint data and results review
- Surveys are rarely included in ITTs; however, these can be powerful tools depending on the nature of the project. They can be used to target a broader group and obtain information with minimal engagement
- Workshops can be very effective to work with groups but must be well managed and carefully planned with diaries. Online tools e.g. electronic white boards can now help ensure these can be virtual if needed, otherwise travelling costs and other factors should be considered.

In terms of frequency of engagement, it is important to consider:

- Engagement fatigue for active contribution such as a survey or other data gathering generally means only one round of engagement is suitable for most stakeholders
- Any other events that should be linked to stakeholder engagement (e.g. a local climate week, alignment with the Local Plan team, use of community venues)
- If stakeholders are being engaged, it is important to consider the influence stakeholders are expecting to have compared to the impact they will have. An example which is frequently communicated from LAEPs is that community groups do not feel properly considered in the process.

Figure 1 summarises how the cost can vary depending on level of engagement needed, considering both depth and breadth of engagement as well as project maturity.

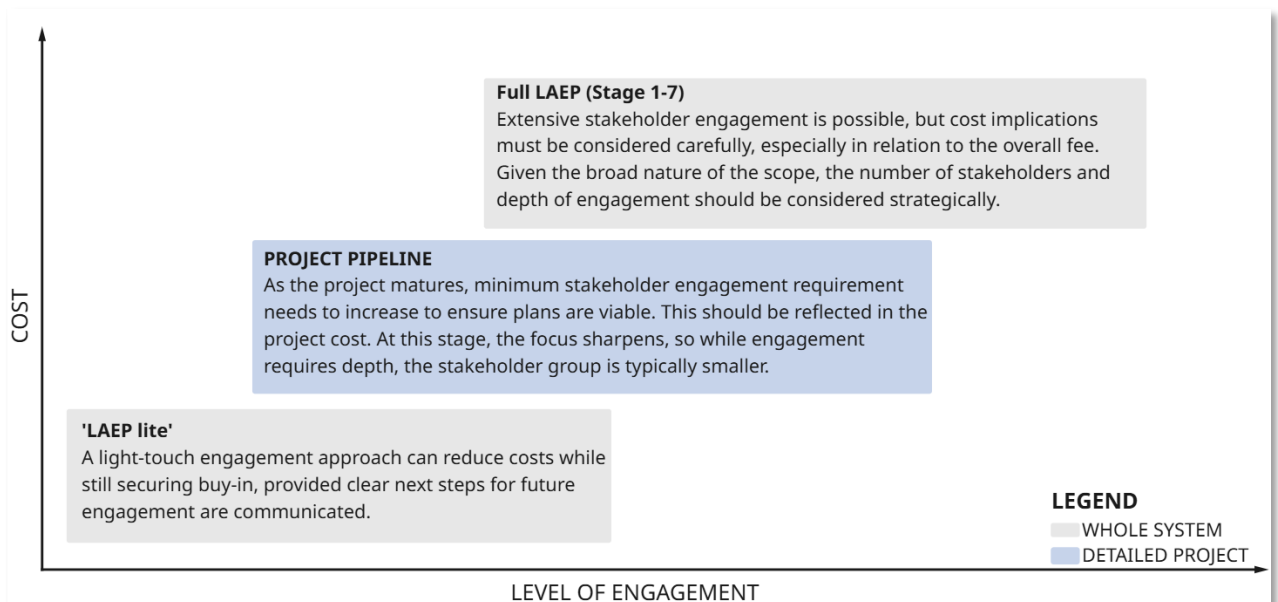


FIGURE 1: EXAMPLE OF COST DEPENDING ON LEVEL OF ENGAGEMENT AND MATURITY OF PROJECT.

How the Stakeholder Engagement Process Feeds into the Different Planning Stages and Considerations

The level of engagement, duration and ownership should form the basis of the Stakeholder Engagement Plan and Strategy. This should be clearly articulated. Figure 2 describes some typical stages of this plan in line with the planning stages.

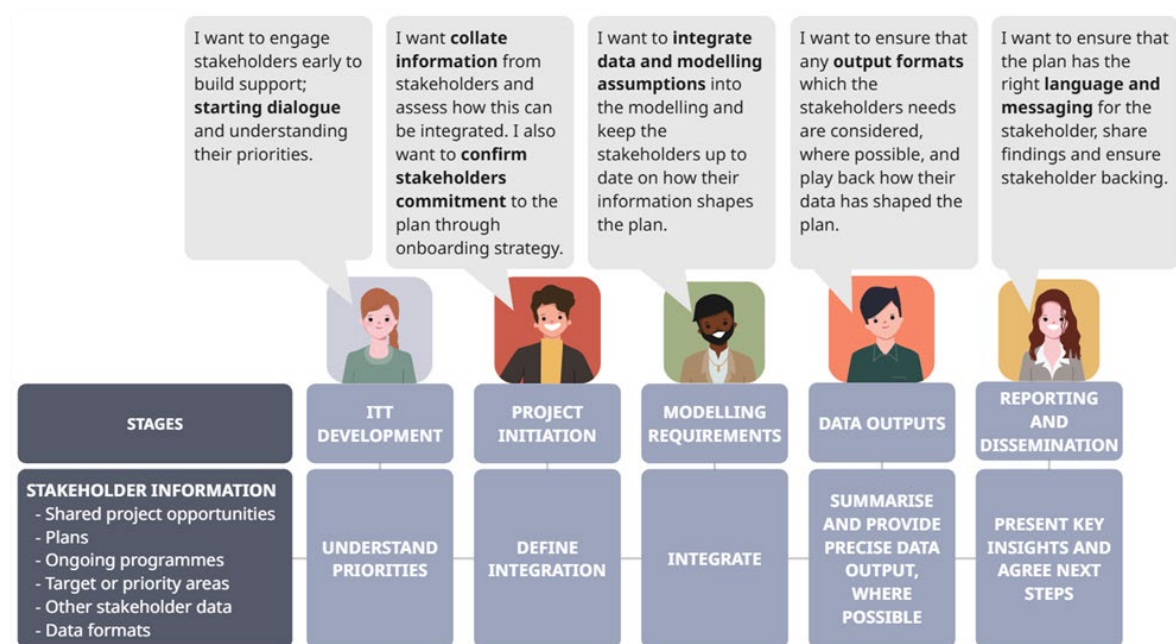


FIGURE 2 LEVEL OF ENGAGEMENT FOR THE DIFFERENT STAGES OF THE PLAN

ITT development: set out clearly in the ITT any current perspective key stakeholders, the level of engagement expected, formats of engagement to be used, and how often engagement occurs.

Project initiation: clearly communicate any considerations in collecting data from stakeholders, specific communication requirements, and ownership of the process.

Modelling requirements: outline the expected process for stakeholder engagement during the modelling process including setting expectations, onboarding key stakeholder members, forming of groups, communication of outputs and tailoring stages for approval and/or wider dissemination.

Data outputs: it is important to understand whether stakeholders require outputs in a certain format and resolution, as described in previous guidance². Consideration should be given to how outputs will be delivered, communicated, visualised and managed. Any strategy should consider onward licensing, any specific software tools preferred and any formats required by third parties e.g. NESO and DNOs have specific requirements. See guidance³ for further detail.

Reporting and dissemination: Consideration should be given early on as to the format of any reports and how this should be tailored for communication to both internal and external stakeholders, including messaging, language, visualisation, and structure. *E.g. some authorities may consider a lighter report for external issue but an internal version with detailed appendices containing the background information.*

² B_Data resolution, data accuracy, data type guidance

³ C_Governance guidance

Examples of how Stakeholder Engagement Enhances the Plan

The receipt of stakeholder information can add considerable local context to the plan and the onboarding of stakeholders early on can ensure buy in to the outputs including raising the profile of planned outputs for consideration in investing and making the plan happen. Table 1 summarises some examples of information that could typically be expected during a LAEP process.

TABLE 1: EXAMPLES OF STAKEHOLDER INFORMATION ITEMS

Stakeholder information	Examples
Shared project opportunities	Planned road works which could influence the routing of a heat network, upcoming boilers replacements, planned retrofit budget allocation.
Plans	Infrastructure developments (e.g. planned heat networks), energy strategies, net zero commitments, Local Plan.
Ongoing programmes	Retrofit initiatives (e.g. warm homes), decarbonisation projects (e.g. solar schools), environmental projects (e.g. tree planting).
Target or priority areas	Geographic areas where stakeholders are focusing their efforts (e.g. Heat Network Zones, conservation area, areas of high deprivation)
Other stakeholder data	Any stakeholder datasets which could inform the project (e.g. industrial energy consumption, existing studies, measures already implemented)
Data format	Existing data formats, data structures, spatial identifiers. Note: This relates to all data shared (refer to guidance ⁴ for further information which can support stakeholder discussions).

In summary:

- Consider stakeholder engagement early on and its significance to the planning process
- Segment and categorise the stakeholders, their needs and their value
- Determine both inputs and outputs of the planning process
- Consider the costs and effort for different methods of engagement and how the timing needs to align with the planning process
- Ensure any specific formats and requirements for outputs by third parties are factored in
- Clearly outline expectations and ownership of the process to potential delivery parties in the ITT.

Please also refer to *Commissioning Considerations* which suggests some key stakeholders should be identified whilst setting up the specification.

⁴ B_Data resolution, data accuracy, data type guidance

Case examples

In-person workshop cost indication

As with all items the onus is on the response to the ITT to define the engagement strategy, however, it is important that suitable space within the response document and budget is assigned. As an indication of **cost associated with running a 3 hr in-person workshop**, the 3 hrs of the workshop would tend to be a maximum of 25% of the total costs associated with the workshop (due to travel to and from the workshop, material preparation, coordination, documentation of outcomes). With most consultant rates and at least three consultants attending this can be in the order of ~£5,000.

Engagement in ITT for Westminster, Local Area Energy Plan stage 1-7

The ITT outlined the following requirements:

- **Use case and requirements document:** developed together with the council and any steering group, to guide how energy mapping and scenarios would be used and ensure stakeholders needs were met post-project
- **Engagement plan:** creation of engagement plan with key stakeholders
- **Stakeholder list:** indicative list of approximately 40 stakeholders was provided in ITT, broken down into internal teams, other public bodies, other large landowners, energy distribution, and community groups
- **Clarity surrounding expectations:** preparation of materials to support stakeholder engagement, attending stakeholder engagement meetings, present engagement outputs to council.