**Project Name**

Collaborative Benefits Report (CBR)

Example Template

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# Explanatory Note

This template has been set up to support the Welsh Government’s guidance on **Local and Shared Ownership of Energy Projects in Wales** and should be used in conjunction with that document. It may be used by developers and stakeholders to evidence their work supporting local or shared ownership and the collaborative benefits for the local community of their project when submitting their planning application.

It is **not** a statutory requirement to provide a CBR or to use this template to evidence your CBR, it has been produced as an example of what a CBR might include.

When using this template it is expected that all text in *italics* be deleted and replaced with your own content, including the project name in the header section. Any changes to formatting and layout are permissible. Should you use this template, please **delete** this page prior to submission.

For further support and advice when utilising this document template, please consult the guidance document, particularly Chapter 7: Collaborative Benefits Report, as well as utilise the advice and experience of our [Welsh Government Energy Service](https://gov.wales/energy-service-public-sector-and-community-groups).

# Executive Summary / Foreword

*Summarise your journey towards shared ownership. Ideally this should be co-written and signed by the project developer and key stakeholder(s). Add additional signatory lines as appropriate.*

**Signed:**

|  |  |
| --- | --- |
|  |  |
| *Developer* | *Stakeholder 1* |
|  |  |
|  | *Stakeholder 2* |

**Date:**

# Stakeholder Identification

*Give the necessary background on all the stakeholders involved in the outset of this project and how you went about to identify them.*

# Engagement Process

*Provide a timeline of stakeholder engagement activities and key moments on this project’s engagement process.*

# Wider Benefits

*Record any benefits of shared ownership engagement which would not otherwise have been secured, such as:*

* *local delivery of some development tasks*
* *social benefits*
* *ecological benefits*
* *etc.*

# Budget Expenditure

*Detail any costs associated with your project’s journey to shared ownership such as:*

* *Legal costs in agreeing a Memoranda of Understanding*
* *Any stakeholders who may have been contracted to set up and promote suitable investment vehicles*
* *etc.*

# Audit Capability, Capacity & Governance Risk

*Record processes and outcomes of mutual appraisal of deliverability of shared ownership/partner selection*

# Shared Ownership Offer & Negotiations

*Record your offer(s), counteroffer(s), negotiations and agreement (or lack of agreement) for an element of shared ownership to be available for your project.*

*If you have an agreed Memorandum of Understanding, it should be signed by the developer and lead counterparties as well included in the Appendices at the end of this document.*

# Project Benefits Summary

*Detail a summary of the project benefits based on finance projections available at the time of writing:*

* *Shared ownership returns*
* *Wider benefits secured by shared ownership engagement*

*Consider consulting the* [*Welsh Government Energy Service*](https://gov.wales/energy-service-public-sector-and-community-groups) *in particular regarding this section.*

# Appendices

*Include other relevant documentation such as:*

* *Meeting minutes*
* *Press coverage*
* *Photographs*
* *Correspondence*
* *Formal signed agreements such as Memoranda of Understanding*
* *etc*

*Remember to update the table of contents prior to finalising the document.*