



## Introduction

Developing decarbonisation projects in the public sector is a challenging task. Multiple internal and external stakeholders are required to secure the momentum and successful delivery of any project, whether it be an energy efficiency measures project or a large-scale renewables project.

This guidance note seeks to provide useful case studies and examples on how to engage with the right stakeholders at the right time, to maintain engagement from inception through delivery, into monitoring.

The Welsh Government ambitions for the public sector to reach Net Zero by 2030 is currently set against a backdrop of a cost-of-living crisis, huge holes in Local Government budgets and stretched resources with competing priorities. The Welsh Government Energy Service aims to help provide capability and capacity to the public sector in meeting these ambitious aims and we can help you in a variety of ways, so please do get in touch.



## Key considerations - project lifecycle

Considering where you are within your project lifecycle will help you determine what type of stakeholder engagement you need to do. If you have not started stakeholder engagement in any meaningful way yet but are part way through, that does not matter at all. Below we will look at some real case studies and review steps taken based on where in the project lifecycle they were.

At the early stage you might just have an idea, or a strategy against which you are working. From this early stage you will want to ensure you have understood who your key stakeholders are e.g., members, senior leaders, heads of service and you will want to make sure you have enough information to enable them to make a considered decision at the appropriate time. Consider carefully what you want from each person in terms of project delivery and how to engage with them at various stages.

### 1.1.1. Start a project

- **Who should be involved in your project right now?**
- **What are the key roles you will need to deliver your project? Do you have these internally?**
- **Who are the key decision makers for a project like this within your organisation?**
- **Is anyone else nearby doing anything similar?**

You will also start thinking about your governance route, the types of papers you need to prepare and how this might affect your delivery timescale.

Are there skills you think you need that you do not readily have available? If so, can you



buy these or are there funded options available like the Energy Service? It is important at this stage to absorb as much external intelligence as you can from neighbours, again this is something the Energy Service can help with by facilitating knowledge sharing amongst peers.

### Case Study: University of Wales, Trinity St Davids (UWTSD)

UWTSD began investigating some renewables projects in 2022. The team is small and focussed whilst the sites are reviewed, and the outcomes considered. A dedicated group meets monthly to refine the site list. The Energy Service provided a detailed feasibility and technical report for them to consider next steps in terms of project delivery. At this point the information and team are small – there is not an actual project yet, just some ideas and whilst those are being refined it is useful to keep the group agile and focussed. Your “inner circle” might include Sustainability / Energy Lead, Finance Business Partner and someone with technical / electrical background.

You may be providing regular updates to a wider group on an infrequent basis at perhaps Director level, this will enable a smooth transition from concept to feasibility and through to delivery, and ideally there will be a strategic framework in place under which you are able to undertake this exploratory work. This wider, informed network

might include the key decision makers, project delivery team, procurement (if not included as part of the smaller team) and any key staff or services areas likely to be impacted.

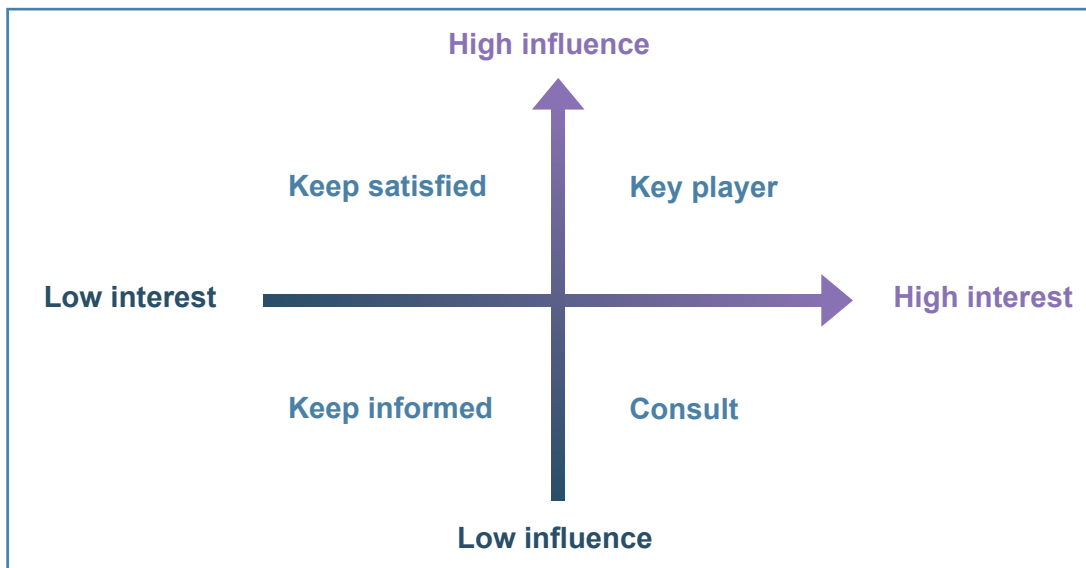
*“The idea of consolidating a long list of options to then have high level analysis on to be whittled down was a really helpful approach for us. We found there were buildings near the top of our list that weren’t suitable and ones we hadn’t really considered that were.”*

**Dan Priddy, Finance & Business Performance Manager, University of Wales Trinity St. David.**

### 1.1.2. Maintaining Momentum

This can often be the most challenging time for a project, they have a great start and then struggle to maintain momentum and, sometimes, this might be as a result of stakeholder engagement.

- *Do you have a full list of all your stakeholders?*
- *Have you considered the difference between interest and influence amongst your stakeholders? Classify your stakeholder group into manageable categories.*





- *Have you identified who are the key players, who do you need to keep satisfied, who needs to be consulted, and who just needs to be informed? It is important to understand who are the deal makers/ brakers for your project.*
- *Draft, review and use your communications plan.*
- *Go wide with the list of stakeholders, and then wider still.*

### Case study: Caerphilly County Borough Council

#### An example of going wide, early, and often with stakeholder engagement which set them apart and helped maintain momentum

Caerphilly Council have been working on a renewables project for more than three years and are hoping to submit a planning application this year. They followed the same pattern as UWSTD, having a small, dedicated, focused team which then grew following internal sign offs on early feasibility reports, to incorporate other internal stakeholders: procurement, finance, legal, planners, and energy teams.

Whilst there might not be a “Gate Zero” sign off during this phase, you will need to get corporate sign off to progress. The Energy Service project brief can help provide all the information you might need to draft the initial business case. Following this sign off you might want to consider a mobilisation meeting to review key risks to delivery, identify key roles and responsibilities, and agree on a high level timeline. Again, this is part of the support offered by the Energy Service.

It is then helpful for the core project group to meet

on a regular basis to maintain momentum, while providing frequent scheduled reporting to your leadership or Senior Responsible Officer. This approach worked very well in Caerphilly to ensure all parties understood their role in the project and were kept up-to-date with relevant progress.

An important step during this maintaining momentum phase is to incorporate stakeholder engagement with both key decision makers, and also significant interested parties.

At Caerphilly, this included the Corporate Management team, Cabinet Member and all the ward members. They were provided with monthly or quarterly updates, and/or short updates when significant milestones were achieved. Keeping this group of stakeholders informed and aware of the project enabled oversight and comfort with the key decision makers as to how the project was progressing. Importantly, including ward members at this point helped focus and refine communications plans and stakeholder events.

Caerphilly also engaged widely with the local community; early correspondence included awareness letters and notifications, house visits to residents, pop up stakeholder events, as well as the statutory consultation required.

As part of the statutory consultation Caerphilly utilised some innovative techniques such as a virtual room. This is an online space where members of the public can access key documents in relation to the project, submit questions and interact with the project team on an ongoing basis. Caerphilly also held follow up online engagement events and visited local schools as part of the statutory consultation process and awareness raising for the project.



## Virtual stakeholder room



## In-person stakeholder events





The Energy Service supported this project from its initial phases and while maintaining momentum: helping refine the strategy, sharing learnings from similar projects, and providing technical support to the project team, which was identified as a key gap from within the council.

### 1.1.3. Crossing the finish line

Finally, the end is in sight and you have managed a project through to its conclusion. You may be ready to hand over operational control, or you may be keeping this with your team. This is a really important step in every project. Below we look at some questions and a case study of how to manage this phase.

- ***Have you got an internal and external communications plan celebrating the project?***
- ***Have you considered how to wind down activities and importantly thank those who have been involved along the way?***
- ***Have you started engaging with any ongoing contractors/ teams who need handover support?***
- ***Have your stakeholders identified key outcomes/ deliverables and are you clear on how to monitor and report on these, and on what frequency?***

### Case Study: Swansea Bay University Health Board



Swansea Bay UHB successfully commissioned a 4 MW solar farm directly connected to Morriston Hospital in 2021. The Health Board used the news page of their website to provide updates on the project's development and announce its successful commissioning. The then Minister for Climate Change, Julie James, was invited to visit the project, increasing the awareness of the project's success. Numerous news outlets reported on the project and its success including the BBC, the Independent newspaper, local news outlets and trade news outlets (e.g. Solar Power Portal). Following completion the team at Swansea Bay UHB have been proactive in sharing information about their successes directly with other health boards, public sector organisations and community energy enterprises, helping to both inform and inspire other organisations.

**You can contact the Energy Service using any of the methods below:**

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