SPARKING CHANGE

Working with communities to deliver a low carbon future



involve MAYOR OF LONDON

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01

INTRODUCTION TO THE PLAYBOOK

1.1 PURPOSE OF THE PLAYBOOK

This playbook supports local authority officers and partners, working across a range of functions, to embed meaningful community involvement into energy planning and decarbonisation delivery. If you are working on area based decarbonisation and need to create meaningful engagement and support with local communities, this is for you.

Across London, boroughs and strategic partners are developing Local Area Energy Plans (LAEPs), climate strategies, retrofit programmes, heat network projects, transport, and wider area-based decarbonisation initiatives. These area based decarbonisation interventions depend on people, places, and communities. Projects require public support, participation, behaviour change, local legitimacy, or coordination across multiple local actors.

This creates a need for engagement that moves beyond one-off consultation exercises and instead supports delivery throughout the lifecycle of projects and programmes.

The guidance is designed to be practical and realistic. It recognises that authorities are operating within constraints relating to time, funding, staffing, procurement processes, political priorities, and technical feasibility. The aim is not to prescribe a single model of “best practice,” but to help officers make informed and proportionate decisions about how engagement can support better outcomes in their own context. Through applying practical, realistic solutions as a core part of delivery infrastructure, officers can unlock the pace and scale of delivery by working with communities.



It is intended to help authorities:

- design engagement that is more meaningful, inclusive, and connected to decisions
- strengthen the quality and legitimacy of decarbonisation planning and delivery
- reduce implementation risks and improve deliverability
- support more coordinated and joined-up engagement across programmes
- build stronger relationships and trust with communities over time
- embed engagement into delivery systems, rather than treating it as a standalone activity

The playbook can support:

- strategic planning and governance
- development of engagement strategies and approaches
- commissioning and procurement of engagement activities
- project and programme development
- delivery-stage engagement and communications
- partnership working and coordination
- internal business case development and organisational buy-in



HOW TO USE THE PLAYBOOK

The playbook is structured around this idea that meaningful engagement requires more than selecting individual methods or running isolated consultations. Effective engagement depends on understanding why engagement matters, how it should be designed and organised, and how it changes across different stages of planning and delivery.

It is intended to be used flexibly rather than read from start to finish.

PLAYBOOK STRUCTURE AT A GLANCE

Section One



INTRODUCTION TO THE PLAYBOOK

Introduction, how to use the playbook, and glossary of terms

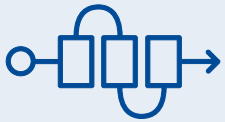
Section Two



MAKING THE CASE FOR COMMUNITY ENGAGEMENT

The spectrum of engagement, and the purpose they serve

Section Three



ENGAGEMENT ACROSS THE DELIVERY JOURNEY

Community involvement at stages of the delivery journey

Section Four



WHAT THIS LOOKS LIKE IN PRACTICE

How engagement may work for the different projects

Section Five



PRACTICALITIES OF MAKING IT HAPPEN

Required resources, structures, skills, and internal coordination

- If you are developing your strategy for your decarbonisation projects - go to section 2.3 on developing your engagement strategy
- If you need to build support for engagement on your project - go to section 2.2 on making the case
- If you are delivering your LAEP, or an overall climate strategy - check section 2.2 and 4.1
- If you are design or commissioning a specific engagement process - go to section 2.4
- If you are already delivering a project and want to increase engagement - go to section 3 and find the stage that you are at. Also have a look at the worked examples in section 4.
- If you are working on a heat network, community solar, EV charging roll out go to section 4.2 to 4.6

IN YOUR TOOLBOX

The accompanying toolbox also includes a number of practical tools, templates, prompts, and frameworks that can be adapted and used in different organisational contexts.



Click to view

1.2 GLOSSARY OF TERMS

Co-design -"a participatory approach to designing solutions, in which community members are treated as equal collaborators in the design process" — Sunlight Foundation.

Deliberation - a structured process where people learn, reflect and discuss issues in depth and come to a set of conclusions or recommendations. It is an approach to decision making that encourages reflection, promotes equality of contribution and is non-coercive. It is a form of collective reasoning. In public deliberation, those involved consider relevant, balanced and unbiased information and experiences from different points of view, to engage with trade-offs collectively and form a shared conclusion or recommendation on what to do next.

Engagement - the practice of involving the public in the agenda setting, decision making, and policy forming activities of organisations and institutions, when that involvement is initiated by the organisation or institution.

Key actors and interested parties - people or groups who are affected by, or have influence over, a decision. For example, residents, local businesses, schools, transport providers, environmental groups.

Lived or living experience - someone who has been impacted by the issue.

Minoritised voices - the voices of those who do not belong to a majority.

Participation - the ways that members of the public engage with structures and institutions of democracy, including when that engagement is led by the public.

Power - the ability to influence an outcome.

Sortition - referred to as a civic lottery or democratic lottery, is the selection of a certain population based on demographics (like age, gender, education level and/or ethnicity), geography and/or attitudes to a certain topic.



ORGANISATIONAL INFORMATION AND ACKNOWLEDGEMENTS

The Greater London Authority (GLA) is London's strategic regional authority, comprising the Mayor of London and the London Assembly. The GLA provides strategic leadership across London, preparing the Mayor's statutory strategies, including the London Plan, and working with partners to support sustainable growth, economic development, environmental improvement, climate action, community engagement, and the delivery of infrastructure and public services.

Involve is the UK's leading public participation charity. We work to make public participation and deliberation an integral, everyday part of democracy, to help solve the challenges of the 21st century. Since 2003, we have been working with governments, parliaments, civil society, academics and the public to realise new forms of public participation that revitalise democracy and improve how decisions are made.

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With thanks to core team Jem Mc Kenna-Percy, Phil Smith and Zoe Wilkins from GLA and Phil Miller, Carly Walker Dawson, Kelly McBride and Adam Mendum from Involve. The whole team is incredibly grateful to the local authority officers from various London Boroughs who help shape and test this work.

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02

MAKING THE CASE AND CREATING YOUR ENGAGEMENT APPROACH

2.1 PRINCIPLES FOR GOOD ENGAGEMENT

Engagement refers to how local authorities and delivery partners interact with communities, key actors, and wider publics in the development and delivery of policies, plans and projects. Engagement exists on a spectrum, ranging from informative, one-way approaches to more participatory and shared forms of decision making (see Figure 2.1).

Each form of engagement serves a different purpose, requires different levels of resource and commitment, and is appropriate in different contexts. For example, informing and consulting may be appropriate where decisions are largely constrained or technical, while more participatory approaches may be needed where local knowledge, values, and trade offs are central to the decision.

Effective engagement requires a shift away from seeing community involvement as a single consultation exercise and toward seeing it as part of how energy planning and decarbonisation are developed and delivered. Engagement should be purposeful, proportionate, clear about influence, and linked to real decisions. It should not sit apart from the delivery process — it should help shape, test, support, and improve it. This means being clear from the outset about why engagement is happening and how it fits within an overall strategy.

Engagement can be used to understand local priorities, test assumptions, shape options, build legitimacy, support uptake, or maintain accountability. These are different purposes that require different approaches.



FIGURE 2.1

THE IAP2 SPECTRUM OF ENGAGEMENT, FROM ONE-WAY COMMUNICATION TO SHARED DECISION MAKING AND COMMUNITY-LED ACTION.

INFORM



Provide information to rise awareness or improves understanding of changes

Examples

- Websites and fact sheets
- Public information
- Newsletters and updates
- Social media and alerts

CONSULT



Ask communities for their views on proposals or options to help inform decisions

Examples

- Surveys and questionaires
- Public meetings
- Online consultations
- Feedback forms

INVOLVE



Work directly with communities to understand issues, explore options and ensure their views are considered.

Examples

- Workshops and focus groups
- Participatory mapping
- Deliberative discussions
- Stakeholder panels

COLLABORATE



Partner with communities to co-develop solutions and incorporate ideas and feedback into decision making.

Examples

- Co-design workshops
- Citizen's juries
- Participatory decision making

EMPOWER



Support communities to take the lead, make decisions and drive action and delivery.

Examples

- Community-led projects
- Co-production of services
- Community ownership and governance
- Supporting local action and initiatives

← **INFORMATIVE AND ONE-WAY APPROACHES** — **PARTICIPATORY AND SHARED DECISION MAKING** →

FRAMEWORK 2.1

PRINCIPLES FOR AREA BASED ENGAGEMENT ON DECARBONISATION

Purposeful

Designed around a clear understanding of what it is trying to achieve. Being clear about purpose helps ensure that engagement is proportionate, appropriately designed, and connected to decision making.

Connected to delivery

Integrated into wider delivery processes rather than treated as a separate or parallel activity. Where engagement is treated as an afterthought, it is much harder for it to influence outcomes. Where it is built into the system, it can become a practical tool for improving delivery, strengthening trust, and supporting a fairer transition.

Understood as a journey

Communities may be involved at multiple points throughout the lifecycle of a project or programme, with different roles at different stages. Engagement should therefore be considered as a connected and evolving process rather than a series of isolated activities.

Accountability built in

It is important that the Council shares the results of any engagement and provides feedback on what happens as a result. This may need to be ongoing and longer term and ensuring that there is a feedback loop back to participants and interested parties is critical in building trust.

Transparent about influence and constraints

Participants should understand what is open to influence, what decisions have already been made, and how their input will be used. In many cases, projects are shaped by technical, financial, or regulatory constraints. Being honest about these constraints makes the process more credible. Wider transparency on the engagements that are happening shows the wider public can see what is happening.

Inclusive by design, and go beyond self-selecting groups

You should include activities designed to reflect the needs of local population and reach diverse groups and perspectives. Inclusion should be considered from the outset rather than treated as an additional requirement later in the process. Officers need to think carefully about who is affected, who is missing, and what barriers may prevent participation. Inclusion is not only about fairness — it improves the quality of decisions and helps avoid reinforcing existing inequalities.

Proportionate, with sufficient time and resources

Not all projects or decisions require the same depth or intensity of engagement. The scale and type of engagement should reflect the significance of the decision, the level of potential impact, and the degree of influence that can realistically be offered.

Support learning and adaptation

Effective engagement processes create opportunities for reflection, feedback, and adaptation over time, particularly in complex or evolving delivery contexts. Inputs need to be balanced to reflect a range of perspectives that enables full participation.

These principles are based on Involve's core principles, and reflect learning from a range of engagements on decarbonisation.



2.2 MAKING THE CASE FOR ENGAGEMENT

Decarbonisation projects are generally place based. They are often infrastructure intensive, visible, disruptive and closely connected to everyday life. As such they require insight and support from the communities affected by the transition. Engagement helps ground technical plans in local reality and lived experience. Through a better understanding of local priorities and constraints it leads to more grounded and feasible plans and improved design of interventions and delivery approaches.

For decarbonisation projects, engagement needs to be reframed as a core delivery function (and not a nice to have). This is particularly important for projects that are politically sensitive; technically complex; dependent on public support or uptake; and/or likely to affect local places or households directly. Engagement is not just about ticking the consultation box, but about improving implementation and outcomes.

TABLE 2.1

BENEFITS OF ENGAGEMENT

RISKS OF ABSENT OR POOR ENGAGEMENT

- project delays
- resistance or backlash
- failed uptake
- low trust
- poor project design
- missed local knowledge
- reputational damage
- costs of treating engagement as an afterthought

BENEFITS OF EARLY AND WELL-DESIGNED ENGAGEMENT

- project quality
- social legitimacy
- smoother delivery
- stronger local alignment



Internal and political buy-in shapes the depth, quality and legitimacy of engagement. Where leadership understands engagement as a tool for managing risk, improving decision making, and strengthening public mandate, it is more likely to be embedded meaningfully across the project lifecycle.

Political buy-in is especially important in creating the conditions for effective engagement and ensuring that the response to residents' views is proactive and positive in a way that builds trust. Recent work with local authorities through the Net Zero Living Programme, showed that demonstrating a clear leadership commitment increased public trust that their recommendations would be delivered.

You will need to use your understanding of how your organisation works to bring the right people on side. The critical thing is to tailor your message to your audience, based on understanding what their priorities or drivers are. We recommend you create different ways to make your case depending on your audience and what is important to them - from a five minute 'elevator pitch' to a fully costed business case.

CASE STUDY

Southampton City Council ran a Transport Assembly in 2024. They made the case for this based on the need to avoid expensive mistakes when making major transport infrastructure decisions and also respond to citizen concerns. Transport was recognised as a source of frustration by residents. 29% of Southampton's emissions come from transport and there were upcoming decisions, such as on the Local Transport Plan, that the assembly aimed to influence. They partnered with Southampton University who provided funding, expertise and resources.

Together with the university, officers worked with a supportive politician - someone who recognised the need and was able to make the case to others. Throughout the process various elected officials observed the process and support built as members saw the value of considered public judgement. The Council Leader kicked off the process and heard the final results. The report from the assembly can be found here.



TABLE 2.2

KEY INGREDIENTS FOR MAKING THE CASE FOR ENGAGEMENT INTERNALLY

SUGGESTED FRAMING	KEY INTERNAL ACTORS	CONNECTING TO WIDER PRIORITIES	KEY CONSIDERATIONS
Shift engagement from a 'nice to have' to a core delivery function framed as: • **A risk mitigation strategy** reducing opposition, delays, and redesign costs • **A delivery enabler** supporting uptake, behaviour change, and coordination • **A legitimacy mechanism** strengthening democratic mandate • **A design input** improving feasibility and relevance of interventions *Find more detail on these frames and evidence to support them in the toolbox*	• Elected members (cabinet members, portfolio leads) and their advocates • Senior council leadership (Chief Executive, Directors) • Climate and energy teams • Communications and engagement teams • Finance and commissioning teams • Legal and governance teams • Planning, housing and regeneration	Look for opportunities to connect to wider council priorities and take a more joined up and strategic approach. For example: • Fairness • Cost of living • Health and comfort • Local economic development • Social value • Trust in local institutions For political buy-in connect to the manifesto and other political commitments. Also focus on risk and the financial and reputational cost when engagement doesn't happen. See the Cost of not engaging report for example	**Framing matters** Engagement should be positioned as enabling delivery, not slowing it down. **Clarity on influence** Be explicit about what communities will and will not be able to influence. **Political risk versus delivery risk** Engagement often reduces long-term risk, even if it introduces short-term complexity. **Resourcing must be agreed early** Engagement cannot be retrofitted without cost or capacity. **Consistency** Alignment across departments is critical to avoid mixed messages.

IN YOUR TOOLBOX

Find the following in the toolbox to support you making the case:

- ☑ A step-by-step checklist to making the case
- ☑ 'Benefits of engagement' table, providing a range of arguments and evidence that you can use
- ☑ Arguments to overcome common challenges
- ☑ Engagement approaches that can be used to make the case
- Cost of not Engaging report

2.3 CREATING YOUR ENGAGEMENT STRATEGY

People often jump too quickly to 'doing engagement'. Once you are clear why engagement is important and have the budget allocated (or sometimes as part of making the case) we recommend outlining an engagement strategy.

This sets out what you want to achieve overall and how different forms of engagement connect to decisions, delivery and outcomes. Taking a strategic approach helps organisations move away from one-off consultation exercises and toward a more connected and purposeful model of community involvement.

This more joined-up approach helps ensure that engagement activities are connected rather than fragmented. It creates stronger continuity between conversations, reduces duplication, and helps organisations build longer-term relationships rather than relying on repeated one-off engagement exercises.



CHECKLIST 2.1

WHAT TO THINK ABOUT WHEN DESIGNING YOUR ENGAGEMENT STRATEGY

- ☑ What are **your objectives** for climate change and net zero? What are the key decisions that need to be made? Where is engagement needed?
- ☑ What do you want/ need to **achieve** through engagement overall (engagement objectives)?
- ☑ **How does this connect** to the Council's wider strategies and priorities?
- ☑ **What else is happening** in the climate and clean energy space locally?
- ☑ What else is the Council **currently engaging** residents on?
- ☑ What is the **portfolio of engagement** that you need (see spectrum of participation above)? Where do you need to engage in depth? Where might you need other forms of engagement?
- ☑ What do you need to do to **prepare to use and respond** to any engagement? Who might you need to partner with (see below)?
- ☑ What can you learn from **what has been done already**?
- ☑ What is your **engagement journey**? What's the long term plan to embed public engagement across your projects and decision making?
- ☑ How will you know you have been **successful**?

CASE STUDY

In 2025, Cardiff Council developed an engagement strategy for its proposed retrofit programme, which aims to deliver warmer homes, lower bills, improved health outcomes and wider economic benefits, while supporting a just transition to net zero. The Council recognised that technical planning and economic modelling alone would not guarantee success. Building trust, ensuring uptake, and supporting residents before, during and after installation are equally critical. While the Council had strong strategic evidence (including co-benefit analysis and health impact assessment), there remained significant uncertainty about the how of delivery, particularly around trust, uptake, contractor quality and reaching those most in need.

The project focused on designing an engagement framework that would reduce implementation risk, improve resident experience, strengthen cross-sector coordination, and embed learning for long-term climate action. It combined strategic workshops, internal capacity building through public engagement training, and an Affordable Warmth Partnership Roundtable to build on existing work. This new strategy supported Cardiff Council to make public engagement a core part of their retrofit programme. It included a plan to embed engagement across the full programme lifecycle, recommendations to include engagement requirements in procurement, prioritise aftercare, invest in tailored approaches, strengthen partnerships through standing steering groups, and protect minimum engagement standards even under funding pressure.

Further information on this case study.

2.4 CREATING A STRATEGIC APPROACH TO ENGAGEMENT

1. Thinking beyond one off engagement and aligning different forms of engagement to thew delivery journey

Engagement should not be a single activity or isolated consultation exercise. In many cases, communities may be involved at multiple points across planning, development, delivery, and implementation, with different forms of participation serving different purposes over time. This might be for one project, or multiple projects.

For example:

- early engagement may focus on understanding priorities, setting strategy, local context, or lived experience
- later engagement may focus on testing assumptions, refining delivery approaches, or supporting participation and uptake
- ongoing engagement during delivery may focus on communication, feedback, accountability, or continuous improvement

This is a core part of your engagement strategy and is particularly important in the context of decarbonisation, where there may be several projects working in parallel that often involve long delivery timelines, evolving projects, and ongoing relationships with communities, delivery partners, and key actors.

See Chapter 3 for more detailed guidance on how engagement approaches may vary across different stages of the delivery journey.

2. Connecting engagement to decisions and delivery

Engagement is most effective when it is clearly connected to decision-making and delivery processes.

For each engagement, participants need to understand:

- why engagement is taking place
- how their input will be used
- where influence sits
- what will happen next

Without this clarity, engagement can feel extractive or disconnected from outcomes. Providing clear and accessible updates about what was heard, what changed, and how decisions were made helps reinforce the value of participation and supports longer-term trust and credibility.

3. Planning engagement proportionately

Not all projects require the same level or intensity of engagement. The most appropriate approach will depend on factors such as:

- the scale and visibility of the project
- the level of impact on communities
- the extent to which behaviour change or participation is required
- the complexity or sensitivity of the issue
- the level of influence available
- available resources, time, and organisational capacity

Trying to apply the same engagement model in all situations can lead to unnecessary complexity, disengagement, or inefficient use of resources. Instead, engagement should be proportionate to the context and focused on where it is likely to add most value.

Chapter 4 provides additional guidance on how engagement approaches may vary depending on the type of project or intervention being delivered.

4. Ensuring that all the different engagement happening adds up

One of the most common challenges in engagement is fragmentation. Different teams, programmes, or delivery partners may run separate engagement activities with overlapping audiences, similar questions, or inconsistent messaging. This can:

- create confusion for participants
- contribute to engagement fatigue
- reduce trust and willingness to participate
- make it harder to build coherent insight across programmes

Your engagement strategy should address this leading to a more coordinated approach. This may involve:

- aligning engagement across programmes or teams
- sharing insights internally
- coordinating timelines and communications\ building on previous engagement rather than starting from scratch
- identifying where different projects can use shared engagement activities or evidence

This does not mean all engagement should be centralised or standardised. Different projects will still require tailored approaches. However, coordination can help ensure that engagement feels more coherent and respectful of participants' time.

5. How to build continuity and feedback loops throughout your approach

Feedback loops are a critical part of long-term engagement. Participants need to understand:

- how their input has been used
- what decisions have been influenced
- what has changed as a result
- what happens next

Without this continuity, engagement can feel extractive or disconnected from outcomes, reducing trust and willingness to participate in future processes.

Providing feedback does not always require complex reporting processes. In many cases, relatively simple and accessible updates can significantly improve transparency and credibility.

Building continuity over time helps shift engagement away from isolated consultation exercises and toward longer-term relationships that support more effective delivery and accountability. Examples may include:

- 'you said, we did' summaries
- updates through existing community channels
- follow-up workshops or briefings
- ongoing stakeholder groups or advisory forums
- public reporting on delivery progress and outcomes

2.4 ENGAGEMENT PLANNING

Once you have a strategy, you can move to planning your specific engagement activity. There are many resources available to help you to do this, some of which we have included in the toolbox. The Local Climate Engagement resource hub provides a step by step guide to doing in depth engagement and includes many practical tools and case studies that you will need. In this playbook, we have focused on the project lifecycle in chapter 3 and worked examples in chapter 4.



2.5 MAKING THE CASE FOR INCLUSIVE ENGAGEMENT

Inclusive engagement is a central requirement for effective area based decarbonisation projects. It is not an optional enhancement or a separate activity, but a core component of designing projects that are credible, deliverable, and aligned with the needs of all communities. Standard engagement approaches, particularly open consultations or one-off events, tend to reach a relatively narrow group of participants. Without targeted effort, participation is likely to reflect those who already have the time, confidence, and capacity to engage, rather than those most affected by decisions.

IN YOUR TOOLBOX

Find the following in the toolbox to support you planning a specific engagement:

- ☑ Framework: engagement strategy and scope
- ☑ 'Table: planning engagement proportionately
- ☑ Checklist: key questions to ask before selecting engagement methods

Inclusive engagement is not simply about widening participation. It is about improving the quality of decisions, strengthening delivery, and ensuring that the transition to net zero supports a broader range of communities rather than reinforcing existing patterns of inequality.

It is important to:

- Ensure that those who are affected by decisions have the opportunity to be heard, and that engagement processes do not reinforce existing inequalities in participation
- Ground projects in real-world needs that are acceptable to communities, and are able to achieve meaningful uptake. Ensuring that decisions are based on the full range of local experience. When diverse voices are missing, authorities are more likely to overlook barriers, miss valuable local knowledge, and design policies that do not reflect how people actually live. This can lead to lower uptake, implementation challenges, and the need for costly redesign at later stages.
- Redress the risk that engagement processes reinforce existing social and economic divides. More affluent households are often better placed to engage with consultation processes and to adopt low-carbon technologies such as heat pumps or electric vehicles. In contrast, lower-income or marginalised communities may face barriers to both participation and access, risking exclusion from both decision making and the benefits of the transition. This can deepen existing inequalities and undermine confidence in the fairness of local decarbonisation efforts.
- Support trust and legitimacy. Where people feel that changes to their homes, neighbourhoods, or local infrastructure are happening without their knowledge or input, this can create disillusionment and resistance. Poorly designed engagement can send a signal that participation — and the benefits of net zero — are only for certain groups. Over time, this can erode trust in both the local authority and the wider climate agenda.

2.5.1 Practical Strategies for Inclusive Engagement

Designing inclusive engagement requires moving beyond standard approaches and actively considering who is likely to be missed, what barriers they may face, and how engagement can be adapted to address these. It is also about recognising structural inequities and addressing power imbalances. It is not a single technique or method, but a set of design principles that should be applied across all stages of engagement.

TABLE 2.3

EXAMPLES OF PRACTICAL STRATEGIES FOR INCLUSIVE ENGAGEMENT

1 Removal of financial and practical barriers to participation.

Participants should be offered appropriate compensation for their time, such as honoraria aligned with the Real Living Wage. Authorities should also reimburse costs such as travel, childcare, respite care, and digital access. For online engagement, this may include providing devices, data packages, or one-to-one technical support. Without these measures, participation is likely to be skewed toward those with the time and resources to engage, excluding those who may be most affected by decisions.

2 Intentional recruitment and targeted outreach.

Open, self-selecting engagement is unlikely to reach a representative cross section of the population. Where a demographically reflective group is needed, approaches such as sortition or civic lottery can be used to create a 'mini-public' that reflects the local population across characteristics such as age, gender, ethnicity, and income. In other cases, targeted outreach through trusted intermediaries — such as community organisations, fuel poverty charities, or local networks — can help to reach groups who are less likely to engage through formal channels. These intermediaries can provide access and trust, but their reach is not universal, and care should be taken to avoid over-reliance on a limited set of organisations.

3 Address accessibility in a broad and practical sense.

This includes physical accessibility, ensuring that venues are suitable and accessible; sensory and cognitive accessibility, through the use of clear, jargon-free language and appropriate formats; and digital accessibility, recognising that not all participants have equal access to or confidence with digital tools. Information should be available in a range of formats, including large print, audio, video, and translated materials where needed.

4 Pay attention to less visible or structural barriers.

Participants should be asked what support they need as part of the engagement process, without requiring them to disclose formal diagnoses or personal information. In-person events should consider factors such as fatigue, pain, and comfort, with regular breaks, flexible seating, and space for movement. Venues should provide appropriate facilities, including gender-neutral toilets where possible, and allow for support workers or assistance dogs. Staff and facilitators should have a basic awareness of both visible and invisible disabilities, including conditions that may not be immediately apparent. Deeper structural barriers — including trust, relevance, and competing priorities — must also be considered and addressed where possible.

EXAMPLES OF PRACTICAL STRATEGIES FOR INCLUSIVE ENGAGEMENT

5 **Offer multiple and flexible routes into participation.**

A single format or timeslot will inevitably exclude some groups. Providing a mix of online and in-person engagement, as well as offering sessions at different times of day, can make participation possible for those with shift work, caring responsibilities, or other constraints. Using multiple methods also reduces reliance on any one engagement channel and increases the likelihood of reaching a broader range of participants.

6 **Going to spaces and settings where people already are can significantly improve inclusion.**

This may involve working through existing community events, local venues such as libraries or community centres, or everyday spaces such as supermarkets or places of worship. This approach can reduce barriers to participation and make engagement feel more relevant and accessible, particularly for those who may not respond to formal invitations.

7 **Be thoughtful about how engagement is framed and communicated.**

Technical language, particularly in energy planning, can act as a barrier to participation. Information should be clear, accessible, and grounded in issues that people recognise as relevant to their lives. For many residents, abstract references to net zero may feel distant or disconnected. Engagement is more inclusive when it is framed in terms of practical outcomes, such as lower energy bills, warmer homes, improved health, comfort, or local benefits.

8 **There is no single model for inclusive engagement.**

Recognise that different communities and local actor groups may require different approaches. Approaches need to be adapted to context, with a focus on what is most likely to enable meaningful participation for those involved.

9 **Think through power imbalances.**

Talk about addressing power when you brief speakers and observers. Deploy strategies to make things more level, for example no lanyards, first names and casual clothes. Ensure facilitators understand different power dynamics and enable everyone to contribute. For more information on power refer to the **Belfast Co-design guide**.

At the same time, inclusive engagement must be designed within real-world constraints. It is often not possible to reach all groups equally in every instance, and this requires prioritisation. In practice, this means focusing effort on those who are most affected by decisions or most likely to face barriers to participation. Being explicit about these choices, and the reasons behind them, is an important part of designing inclusive engagement in a transparent and credible way.

IN YOUR TOOLBOX

Find the following in the toolbox to support inclusive engagement

- ☑ Checklist for inclusion in engagement design
- UK100 & Involve Inclusive climate action toolkit
- Belfast Co-design guide



03

ENGAGEMENT ACROSS THE DELIVERY JOURNEY

3.1 HOW ENGAGEMENT MAPS ONTO THE PROJECT DELIVERY LIFECYCLE

Local Area Energy Plans (LAEPs), and similar forms of local energy and decarbonisation planning, provide an important foundation for net zero delivery by identifying potential technologies, infrastructure requirements, and pathways for change at a local level. Translating strategic ambitions into coordinated, investable, and deliverable projects requires a series of further stages, from feasibility testing and project development, through to financing, procurement, implementation, and long-term operations.

Community involvement tends to be concentrated in the earlier stages of planning and strategy development.

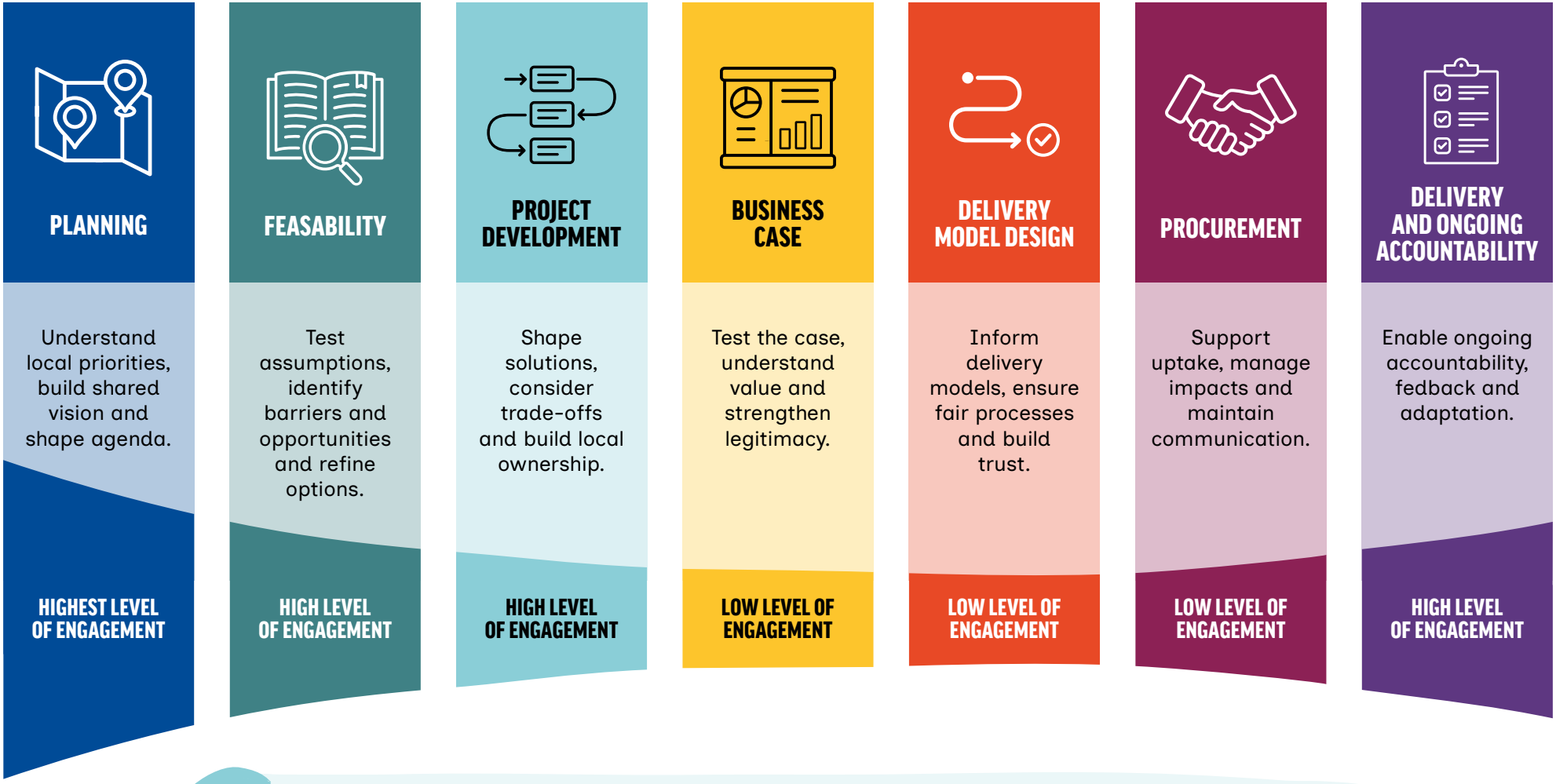
However, community engagement throughout the delivery lifecycle can unlock delivery and help avoid or address blockers and build trust on a sustained basis. This chapter explores how community involvement can support different stages of the delivery journey and how engagement approaches evolve over time as projects move from strategy into implementation.

We have taken the classic project development lifecycle, based on UKRI and Innovate UK, Financing Local Net Zero Projects, and overlaid engagement. Whilst it describes how engagement works at each stage, the level of intensity of your engagement will vary depending on your strategy. Not all projects or stages will require the same depth or intensity. Some stages may benefit from broad and exploratory engagement, while others may require more targeted, operational, or partnership-focused approaches.



FIGURE 3.1

ENGAGEMENT ACROSS THE DELIVERY JOURNEY



Engagement is a continuous thread throughout the delivery - not a one-off activity.
What matters is being clear about purpose, influence and who needs to be involved at each stage.

To make the most of your investment it is important to see how the different elements inform each other. Investment upfront to shape overall ambitions, address trade offs and design outcomes with the community often means that less engagement is needed in the later stages of a project as trust has been built and community needs identified and delivered. This will be true of wider communications and other actors, such as businesses or suppliers, too.

For each stage we have described the benefits of engagement and the types of methods that might work best. We are not recommending that you do all of them. Pick a few that work in your context and align to your engagement strategy. They are based on the classification in table 3.1. A more detailed explainer of each method can be found in the Involve Methods Table that features on P.42 of the **Starting the Conversation Guidance**, developed with DESNZ.

We recommend taking a more intensive approach at the start of a project and then sustaining it with communication throughout. Sustained transparency and regular feedback on the conversations that are happening are key. A community or citizen panel, where a reflective sample of residents come together to learn about the project and then provide recommendations throughout, is a useful way to sustain engagement and provide in depth engagement at key moments. This is also a good way to offer a more responsive, faster paced form of engagement if needed.

TABLE 3.1

TYPES OF METHODS

TYPE OF PROCESS	WHAT ARE THEY	LEVEL	INTENSITY	PROJECT STAGE	EXAMPLE
1. Deliberative & representative processes	Designed to bring together a reflective group of participants — often selected through random stratified sampling — and support them to engage deeply with complex issues over time. They allow participants to hear evidence, question assumptions, and deliberate collectively before forming considered views.	Involve, Collaborate	**Medium to High**	PLANNING FEASBILITY PROJECT DEVELOPMENT DELIVERY	Citizen jury or assembly, citizen panel
2. Co-design, co-production & collaborative design	Working with communities to actively shape solutions, rather than asking them to respond to predefined options. They are particularly useful where interventions need to reflect local knowledge, lived experience, and place-specific needs, and where there is flexibility in how solutions can be developed.	Collaborate, Empower	**Medium to High**	FEASBILITY PROJECT DEVELOPMENT DELIVERY MODEL DESIGN DELIVERY	Co-design workshops
3. Participatory delivery & implementation approaches	Involve communities directly in the delivery and implementation of projects, rather than limiting their involvement to planning and design stages.	Collaborate, empower	**Medium to High**	DELIVERY	Community co-delivery models

TYPE OF PROCESS	WHAT ARE THEY	LEVEL	INTENSITY	PROJECT STAGE	EXAMPLE
4. Participatory decision making & resource allocation	Give communities direct influence over decisions, particularly in relation to funding, priorities, or resource allocation.	Collaborate, empower	**Medium**	PROJECT DEVELOPMENT DELIVERY	Participatory budgeting
5. Governance, oversight & accountability approaches	These approaches focus on embedding community involvement in governance, monitoring, and accountability structures over the long term.	Collaborate	**Medium**	DELIVERY	Resident oversight panels
6. Community-led & peer-based approaches	Shift the locus of engagement from institutions to communities themselves, enabling residents to lead, facilitate, or mediate engagement within their own networks. This can be bottom up (instigated by communities) or about providing resources to communities to engage and providing a route for influence. Communities can mean organised community groups or residents, however, the level of resourcing required will vary depending on which 'type' of community is leading.	Involve, collaborate	**Medium**	PLANNING FEASBILITY PROJECT DEVELOPMENT BUSINESS CASE DELIVERY MODEL DESIGN	Community or energy champions
7. Spatial & visual engagement methods	Help translate complex technical and spatial information into accessible, visual formats that enable participants to engage more meaningfully with decisions.	Consult, inform, collaborate	**Medium**	PLANNING FEASBILITY	Future Energy Landscape (FEL) workshops
8. Targeted / insight-driven engagement	Designed to generate specific, actionable insight from defined groups or individuals, rather than broad-based input. They are particularly useful where decisions require detailed understanding of user needs, behavioural drivers, or barriers to uptake. They focus on gathering input to inform decision making rather than sharing decision-making power directly	Consult, Involve	**Medium**	PLANNING FEASBILITY PROJECT DEVELOPMENT PROCUREMENT DELIVERY	User journey testing

TYPE OF PROCESS	WHAT ARE THEY	LEVEL	INTENSITY	PROJECT STAGE	EXAMPLE
9. Place-based conversations	Focus on engaging people within the context of a specific place, often through open dialogue and listening. They are typically more informal, flexible, and accessible. Then can also connect with communities through use of community researchers engaging directly with their social groups and then coming ogether.	Inform, consult, involve	**Low to Medium**	PLANNING FEASBILITY BUSINESS CASE DELIVERY MODEL DESIGN	Neighbourhood workshops Street pop-ups
10. Digital & hybrid engagement	Use digital tools and platforms to enable participation, extend reach, and provide flexibility in how people engage. They are rarely standalone methods, but instead form part of a broader engagement ecosystem that combines online and offline approaches. They can include but are not exclusively AI-powered or are AI-enabled platforms.	Inform, consult, involve	**Low to Medium**	FEASBILITY PROJECT DEVELOPMENT BUSINESS CASE	Online engagement platforms
11. Key actor & partnership-based engagement	Focus on structured engagement with organised actors, institutions, and delivery partners, either alongside or in place of broader public engagement.	Involve	**Low to Medium**	PLANNING DELIVERY MODEL DESIGN PROCUREMENT	Partnership forums
12. Communication, awareness & transparency approaches	Provide information, building understanding, and maintaining transparency throughout a process. While they do not, on their own, constitute participatory engagement, they are essential for enabling meaningful participation at higher levels.	Inform	**Low to Medium**	**ALL**	Public information campaigns

In practice, engagement decisions are rarely made in ideal conditions. Approaches are shaped by delivery timelines, available resources, political context, technical constraints, and the level of influence available at different stages of project development.

There is rarely a single 'right' approach to engagement. The most appropriate approach will depend on factors such as project scale, visibility, complexity, local context, available resources, and the degree to which delivery depends on public participation or behaviour change.

Regardless of the stage in the lifecycle, engagement should be designed with the core principles outlined in section 1 in mind and the overarching questions for planning any engagement in section 2.



PLANNING

Main purpose	Shape strategic direction and identify pathways toward local decarbonisation
Typical activities	LAEP development, technical modelling, spatial mapping, priority setting
Key actors	Local authority teams, technical consultants, GLA, community organisations, resident
Main role of engagement	Shaping overall direction. Ground planning in local priorities, lived experience and practical realities
Typical engagement intensity	Medium to High

What is this stage?

Preparation of local energy and decarbonisation strategies, including Local Area Energy Planning (LAEP).

What does it involve?

Technical modelling of energy systems, infrastructure requirements, and spatial pathways to net zero. Outputs typically include the identification of priority technologies, areas for intervention, and high-level pathways toward delivery. Some authorities are also developing complementary community-led or co-produced planning processes to help ground technical analysis in local priorities, lived experience, and place-based knowledge.

Why is community involvement important here?

Planning decisions shape the direction of future delivery long before individual projects reach implementation. Assumptions, priorities, and spatial choices established here influence which interventions are taken forward, where investment is directed, and how projects are experienced in practice. Technical modelling can identify system-level opportunities, but cannot fully capture how people experience energy systems in their daily lives, how local places function, or how communities may respond to change. This is one of the most important stages where it is worth investing up front

Benefits of engagement at this stage:

- Helps ensure that planning processes are grounded in local realities as well as technical evidence
- Provides an opportunity to surface practical barriers, test assumptions, identify local priorities, and explore how proposals may be understood and received
- Help identify unintended consequences, improve transparency around decision making, and build relationships that support later stages of project development and delivery
- Creates opportunities to improve the quality and legitimacy of plans, and generates stronger local ownership and more deliverable long-term strategies

This stage is not about 'consulting communities on a technical plan'. Instead, authorities recognise the value of combining technical planning with more participatory and community-led approaches that allow communities to play a more active role in shaping local energy futures.

Engagement in practice

At this stage, engagement approaches are often shaped by two broad models:

1. **Incorporating community input into council or technically led planning processes,** where engagement is used to inform, challenge, or contextualise technical analysis and strategic decision making. The overall planning process is usually led by the local authority and its technical partners, with engagement helping to strengthen the quality, legitimacy, and practicality of the resulting strategy.

2. **Community-led or co-produced planning approaches,** where communities play a more active role in shaping priorities, identifying opportunities, and developing local responses to decarbonisation. These approaches often sit alongside formal LAEP processes or are partially integrated into them, for example, Community-Led Energy Planning (CLEP) developed in Greater Manchester, and Future Neighbourhoods (FN2030) in London. They aim to build shared ownership, deepen participation, and generate more locally grounded forms of planning.

In practice, authorities are increasingly combining elements of both, bringing together technical energy planning with more participatory and community-led approaches, rather than treating them as separate or competing activities. Technical planning processes provide a system-level analysis of infrastructure needs, technologies, and pathways to net zero. Community-led approaches help ground these outputs in local priorities, lived experience, and practical realities.

Successfully integrating these approaches requires deliberate design and coordination. It also requires recognising that technical, spatial, and experiential knowledge each provide different but equally valuable forms of insight. The engagement approaches below can support different aspects of these planning processes.

Suggested methods

1. Deliberative and representative processes

Citizens' assemblies, jury or setting up a citizen panel to be convened throughout the whole process – these demographically reflective groups are convened over a few sessions.

Participants learn about an issue, hear from experts, deliberate together, and develop recommendations. Here you would start by deciding what residents want from their place and energy system and how this project delivers that. This would include translating technical evidence into accessible and locally meaningful formats so that residents can explore trade-offs and make recommendations.

6. Community-led and peer-based approaches

Supporting resident led engagement to align community-generated ideas with future project development opportunities.



8. Targeted / insight-driven engagement

Identifying specific groups that will be most impacted or are least engaged and setting up ways to engage them through intermediaries.

11. Key actor and partnership-based engagement

Actor engagement with local businesses and delivery partners to identify their priorities.

For more detail see Methods Table in
STARTING THE CONVERSATION GUIDANCE

9. Place-based and community conversations

Community conversations or community researchers generate insight to inform modelling assumptions or local priorities.

These can be structured flexibly, training ambassadors to have informal discussions, often facilitated in small groups, that explore people's experiences, concerns, and priorities in their own communities. This could be based on LAEP outputs to structure community conversations to explore trade-offs.

Local forums/ town hall discussions/ drop in sessions to surface concerns are also useful at this stage.

KEY CONSIDERATIONS

- Be clear about what aspects of the plan can and cannot be influenced through engagement
- Translate technical information into formats that are accessible and meaningful to non-specialist audiences
- Avoid duplicate or fragmented engagement processes running at the same time
- Ensure community insight can feed meaningfully into formal decision-making processes
- Consider resource and facilitation requirements early, particularly for co-produced or community-led approaches
- Design inclusivity into engagement from the outset to avoid excluding less-heard groups
- Balance the need for early engagement with the need for proposals to be sufficiently developed to support meaningful discussion
- Use engagement proportionately, recognising that not all planning processes require the same depth or intensity of participation

CASE STUDIES

The Greater London Authority (GLA) integrated insights from the "Talk London" survey—a 10 minute online survey where over 1,000 Londoners shared their opinions on home energy efficiency, solar PV, and heat networks—directly into the modelling for its subregional LAEPs.

Gateshead Council used citizen visioning workshops to ask residents what future energy systems they wanted in specific neighbourhoods and how changes could be implemented in a way that worked for them.

Leicester City Council ran a Climate Assembly style event (an externally facilitated workshop reflecting the city's population) alongside a Young People's Climate Assembly (supported by the Youth Council) to deliberate actions for the city's Climate Emergency Action Plan.

Blaenau Gwent Council piloted a formal deliberative process to co-design the future of the local travel system, addressing affordability and accessibility while preparing the area for net zero.





FEASIBILITY AND LOCAL OPPORTUNITY TESTING

Main purpose	Shape strategic direction and identify pathways toward local decarbonisation
Typical activities	LAEP development, technical modelling, spatial mapping, priority setting
Key actors	Local authority teams, technical consultants, GLA, community organisations, residents
Main role of engagement	Ground planning in local priorities, lived experience and practical realities
Typical engagement intensity	Medium to High

What is this stage?

The transition from high-level planning into more place-specific project development.

What does it involve?

The broad opportunities identified through strategic planning processes begin to be tested against the realities of particular locations, communities, assets, and delivery conditions. It typically involves refining the scope of potential interventions, narrowing down locations or approaches, and assessing practical constraints such as infrastructure limitations, ownership arrangements, access, disruption, or operational feasibility. Authorities and their partners also begin exploring potential delivery approaches and considering how projects may function in practice within specific local contexts.

Why is community involvement important here?

Community involvement becomes particularly important at this stage because projects are moving from abstract strategy into interventions that may directly affect people, places, and local systems. While technical analysis can identify where opportunities may exist, it cannot fully capture how proposals interact with lived experience, local priorities, building use, behavioural patterns, or perceptions of disruption and change.

Benefits of engagement at this stage:

- Helps test whether emerging opportunities are realistic, acceptable, and workable in practice
- Can surface local constraints that may not be visible through modelling alone, identify potential barriers to participation or delivery, and highlight risks or unintended consequences before projects become more fixed

- Helps avoid costly redesign later in the process and improve the overall quality and deliverability of projects moving forward
- Helps ensure that projects progressing into development are not only technically viable, but also grounded in local realities and better aligned with the needs and expectations of affected communities

Engagement approach

Engagement is primarily focused on testing and refining emerging opportunities before projects become too fixed. The emphasis is on understanding how proposals may function in practice within particular places and communities.

Engagement approaches are therefore most useful when they help surface practical insight, identify risks early, and test how emerging interventions are likely to be experienced by those affected. In most cases, the priority is not deep consensus-building, but obtaining sufficiently grounded insight to improve project quality, feasibility, and deliverability.

Approaches are often most effective when they combine broader local listening with more targeted engagement focused on specific groups, places, or delivery questions. Engagement is often iterative at this stage, with emerging concepts refined over time in response to local insight and feasibility findings.

CASE STUDY

For the Mid Antrim upgrade - a significant and potentially controversial grid infrastructure project, the System Operator for Northern Ireland (SONI), deployed a Citizen Sounding Board (CSB).

This involved 24 local residents selected via democratic lottery (sortition) to mirror local demographics (age, gender, ethnicity, socioeconomic background). The group came together to co-design infrastructure routes. This involved a series of workshops where members were compensated for their time, along with a wider consultation survey.

Early inputs allowed SONI to narrow options from broad concepts down to 3 realistic routes and 4 substation sites while plans were still flexible. From there the 24-member CSB achieved a unified consensus on a preferred 30km overhead line route and substation location. SONI maintained 80% of the CSB's preferred route for its 2025 planning submission. Political and business stakeholder buy-in increased due to the transparent process.

The success of the Mid Antrim trial proved the model's institutional feasibility. SONI formally integrated CSBs into its enhanced public engagement model in 2024 as a fundamental requirement for all future major strategic transmission projects.

Reference: People Place Purpose

Suggested methods

2. Co-design, co-production & collaborative design

Co-design workshops – facilitated sessions where participants work collaboratively to generate and refine ideas, often using structured exercises to explore needs, priorities, and solutions based on shared constraints.

9. Place-based & community conversations

Street pop-ups and sessions in community hubs to test assumptions around behaviour, timing, or local priorities and identifying unintended consequences, disruption, or delivery risks.

7. Spatial & visual engagement methods

Spatial planning workshops – sessions focused on how interventions fit within a physical area, often involving multiple stakeholders to test how realistic proposed interventions are in practice and understand how infrastructure or buildings are used locally.

8. Targeted / insight-driven engagement

Proposition testing – structured engagement where specific ideas, offers, or interventions are presented to intended users to assess their appeal, feasibility, and potential barriers.

6.Community-led & peer-based approaches

Working with community and interest groups exploring how proposals may be perceived by affected communities and identifying opportunities for coordination with existing local initiatives or assets.

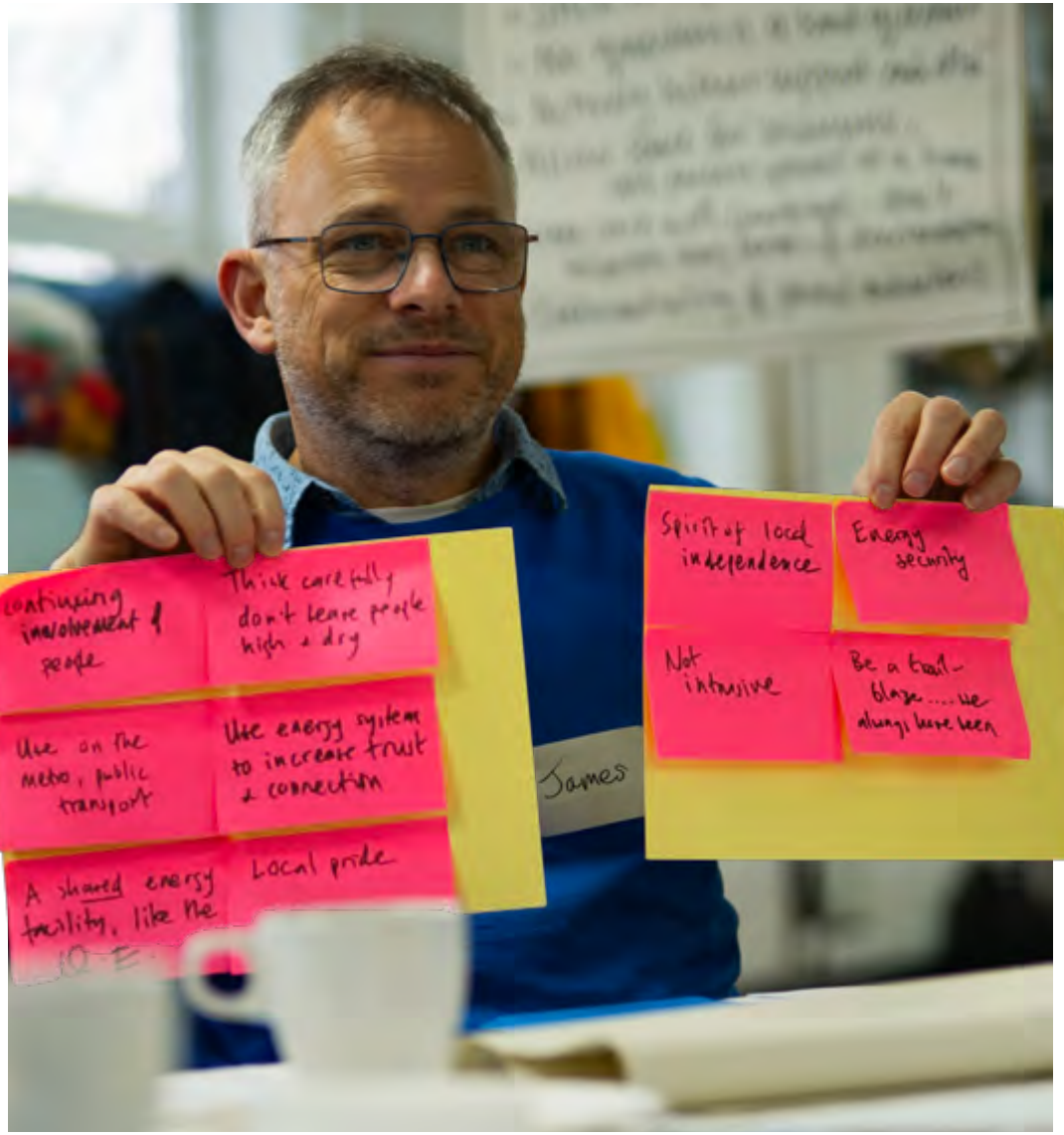
10. Digital & hybrid engagement

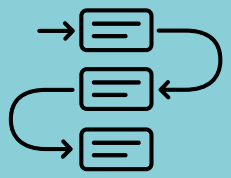
Online engagement platforms to share options, identify concerns and test levels of public acceptability.

For more detail see Methods Table in
STARTING THE CONVERSATION GUIDANCE

KEY CONSIDERATIONS

- Engage early enough to shape emerging opportunities, but late enough for proposals to be meaningful and understandable
- Be proportionate in the scale and intensity of engagement, recognising that not all opportunities will progress into delivery
- Be clear about the purpose of engagement and how input will influence project refinement
- Prioritise practical, actionable insight over broad exploratory discussion
- Ensure engagement reaches groups who are likely to be directly affected by proposals, rather than relying solely on already engaged participants
- Use engagement to test assumptions and identify risks before projects become more fixed
- Ensure insights gathered at this stage are clearly captured and fed into later project development and decision making
- Avoid creating expectations that all opportunities under consideration will ultimately proceed into delivery





PROJECT AND PORTFOLIO DEVELOPMENT

Main purpose	Shape strategic direction and identify pathways toward local decarbonisation
Typical activities	LAEP development, technical modelling, spatial mapping, priority setting
Key actors	Local authority teams, technical consultants, GLA, community organisations, residents
Main role of engagement	Ground planning in local priorities, lived experience and practical realities
Typical engagement intensity	Medium

What is this stage?

Translating individual opportunities into coordinated programmes of delivery.

What does it involve?

Organising interventions into coherent portfolios, often grouped geographically, strategically, or by technology type, such as area-based retrofit programmes, heat networks, or integrated solar and storage schemes. Local authorities and their partners are moving beyond testing whether opportunities are viable and beginning to determine how projects should be prioritised, grouped, sequenced, and delivered over time. This often involves balancing multiple objectives, including carbon reduction, cost effectiveness, deliverability, local impact, and wider social or economic benefits.

Why is community involvement important here?

Decisions about portfolio design shape how delivery will be experienced in practice. Choices around prioritisation, sequencing, clustering, and coordination can affect levels of disruption, the distribution of benefits, and how interventions interact within particular places and communities. This stage also introduces more visible trade offs and prioritisation decisions. Resources, delivery capacity, and funding are often limited, meaning that not all opportunities can progress simultaneously.

Benefits of engagement at this stage:

- Helps ensure that portfolios are not optimised solely from a technical or financial perspective but are also grounded in local realities and responsive to how projects may affect people over time
- Helps identify where interventions should be coordinated, where cumulative impacts may create challenges, and where particular sequencing decisions may support or undermine delivery
- Plays an important role in helping authorities understand local priorities, test acceptability, and build legitimacy around difficult decisions

Engagement approach

Engagement is primarily focused on refining, prioritising and coordinating projects within a broader delivery pipeline. It is less exploratory and more focused on shaping how delivery will happen in practice. Engagement approaches are most useful when they help authorities understand how projects interact within places, identify potential delivery challenges, test local acceptability, and support prioritisation or trade-off decisions where there is genuine scope for influence.

In many cases, engagement here involves balancing strategic coordination with place-based realities. This often requires combining technical and institutional perspectives with insight from affected communities and actors.

CASE STUDIES

In 2022, 12 **Greater Manchester** residents met over six sessions to explore and make recommendations on a governance model for the local energy market. This process was delivered by Carbon Coop as part of a wider effort to ensure greater transparency and accountability around this issue, to meet the energy needs of all residents. These local recommendations influenced the public engagement built into the Regional Energy System Planner and were shared with national bodies such as Ofgem and Department for Energy Security and Net Zero.

Reference: Shaping how well we live together

North Somerset Council used Future Energy Landscape workshops in rural communities to map landscape sensitivity and identify acceptable areas for onshore wind and solar development, which fed directly into the council's local plan consultation.

Reference: Future Energy Landscape

Suggested methods

1. Deliberative and representative processes

A citizen panel convened at each stage to explore trade offs and test the acceptability of cumulative disruption or concentrated activity within particular areas. Here the panel could be presented with the suite of projects and map how they will interact in the community.



2. Co-design, co-production & collaborative design

Co-design workshops bringing residents and other experts together to identify where projects should be coordinated or bundled together and work through sequencing decisions may affect communities or delivery.



4. Participatory decision-making & resource allocation

Informing decisions about where limited resources should be focused first and understanding which outcomes or benefits communities prioritise most.

8. Targeted / insight-driven engagement

User testing to explore how different interventions may interact from a user perspective and/or affect specific groups.

For more detail see Methods Table in
STARTING THE CONVERSATION GUIDANCE

6.Community-led & peer-based approaches

Working with local communities to identify opportunities for local alignment, co-benefits, or partnership working.

10. Digital & hybrid engagement

Using a platform such as Commonplace to assess public acceptability of different options.

KEY CONSIDERATIONS

- Be clear about which aspects of portfolio development are open to influence and which are constrained by technical, financial, or policy requirements
- Recognise that engagement at this stage is often focused on refinement and prioritisation rather than broad strategic visioning
- Ensure engagement reflects the cumulative impacts of multiple interventions within places, rather than considering projects in isolation
- Use engagement proportionately, focusing on deeper approaches where projects are more visible, contentious, or likely to affect communities directly
- Avoid oversimplifying complex prioritisation decisions or trade offs
- Maintain continuity with earlier engagement and demonstrate how previous insight has informed portfolio development
- Coordinate engagement across projects where multiple interventions may affect the same communities or actors
- Ensure that local insight feeds meaningfully into prioritisation, sequencing, and programme design decisions



STRATEGIC AND OUTLINE BUSINESS CASE DEVELOPMENT

Main purpose	Develop robust, investable and evidence-based business cases
Typical activities	Financial modelling, option appraisal, risk assessment, delivery planning, funding development
Key actors	Finance teams, project teams, investors, delivery partners, advisors, affected communities
Main role of engagement	Test assumptions around participation, affordability, uptake and delivery risk
Typical engagement intensity	Low to Medium

What is this stage?

Focuses on translating projects into investable and deliverable propositions. Projects move from broad concepts and portfolio-level coordination into more formal development processes, typically through the preparation of Strategic Outline Business Cases (SOBCs), Outline Business Cases (OBCs), or equivalent investment and approval frameworks.

What does it involve?

Refining project scope, formalising assumptions, assessing costs and benefits, evaluating delivery options, and developing the evidence base required to secure funding, investment, or organisational approval.

Increasing attention is also given to operational realities, including affordability, uptake, delivery risks, user participation, and long-term viability. This stage also often involves increasingly complex trade-offs between financial viability, public value, delivery feasibility, and social outcomes

Why is community involvement important here?

Many of the assumptions underpinning business cases ultimately depend on people. This is especially true for projects that rely on participation, behaviour change, voluntary uptake, or ongoing engagement from households, businesses, landlords, or other users.

Benefits of engagement at this stage:

- Helps test whether technical and financial modelling estimated outcomes are realistic in practice
- Provides insight into affordability, willingness to participate, perceived value, acceptable levels of disruption, trust in delivery arrangements, and the barriers or support mechanisms that may shape uptake and long-term success
- Reduces delivery risk and strengthens the credibility of business cases. Without meaningful community insight, there is a risk that assumptions around participation, behaviour, or acceptability become overly optimistic or disconnected from lived experience, potentially undermining both investment confidence and delivery outcomes later on.
- Can help authorities understand how different groups experience these trade offs, and where greater transparency, flexibility, or support may be needed to maintain legitimacy and trust
- Strengthens the evidence base for wider social value, fairness, and community benefit considerations that may form part of strategic or funding decisions

Engagement approach

Engagement is primarily focused on testing the assumptions that underpin viability and delivery. Compared to earlier stages, the emphasis is less on shaping strategic direction and more on validating whether projects are likely to function successfully in practice. If you have done engagement at the earlier stages these key questions may have already been answered.

Engagement approaches are most useful when they help authorities understand how people may respond to proposed delivery models, costs, participation requirements, operational arrangements, or behavioural expectations. This often involves focused engagement around specific uncertainties or risks within the business case.

Where projects involve significant trade offs, distributional impacts, affordability concerns, or visible public impacts, more deliberative or participatory approaches may also be appropriate to help build legitimacy and strengthen decision making.



Suggested methods

1. Deliberative and representative processes

Testing key aspects with the citizen panel (if using). Reconvene a citizen jury if trade offs are ongoing.

8. Targeted / insight-driven engagement

Focus groups or user test customer journeys, support requirements, or communication approaches and understand how different groups may experience costs and benefits.

9. Place-based & community conversations

Neighbourhood workshops or working through community researchers/ champions to test likely willingness to participate in programmes or services; understanding affordability constraints or sensitivities and identify barriers to uptake or participation.



10. Digital & hybrid engagement

Digital engagement to test assumptions around uptake, affordability, participation, disruption or behaviour.



For more detail see Methods Table in
STARTING THE CONVERSATION GUIDANCE

KEY CONSIDERATIONS

- Focus engagement on the assumptions and uncertainties that matter most for viability and delivery
- Be clear about which aspects of the proposition remain open to influence and which are constrained by financial, technical, or regulatory requirements
- Use engagement proportionately, recognising that not all business case decisions require the same depth of participation
- Ensure engagement includes groups who are likely to be most affected by costs, participation requirements, or delivery impacts
- Avoid relying solely on broad surveys or shallow engagement for complex behavioural or delivery assumptions
- Be transparent about trade offs, constraints, and decision-making criteria where these are shaping project development
- Maintain continuity with earlier engagement and demonstrate how previous insight has informed the business case
- Ensure engagement findings are clearly integrated into viability assessments, risk analysis, and delivery planning rather than treated as standalone consultation outputs





DELIVERY MODEL AND DELIVERY ENTITY DESIGN

Main purpose	Design delivery structures, governance arrangements and organisational responsibilities
Typical activities	Partnership design, governance development, delivery structure testing, operational planning
Key actors	Local authority teams, delivery partners, investors, legal advisors, community organisations
Main role of engagement	Ensure delivery arrangements are practical, credible, inclusive and aligned with user realities
Typical engagement intensity	Usually targeted and partnership focused, with selective community input where relevant

What is this stage?

Determining how projects will be delivered in practice, including the structures, partnerships, governance arrangements, and organisational models that will underpin implementation.

What does it involve?

Projects move beyond questions of viability and into decisions about who will deliver them and how responsibilities will be allocated.

This may involve establishing new delivery arrangements, such as partnerships, joint ventures, special purpose vehicles (SPVs), concession models, or ollaborations with private sector providers, as well as defining the ongoing role of the local authority and other delivery actors. Authorities and their partners are also considering how governance, accountability, operational responsibilities, customer interfaces, and risk allocation will function in practice.

Why is community involvement important here?

Delivery models directly shape how projects are experienced by residents, businesses, and other users. Decisions about governance, ownership, accessibility, accountability, and service delivery can influence levels of trust, participation, perceived fairness, and long-term legitimacy. This is a moment to explore the risks associated with different delivery models.

Benefits of engagement at this stage:

- Helps ensure that delivery arrangements are not only operationally viable, but also practical, inclusive, and aligned with local expectations and delivery realities
- An opportunity to test whether proposed delivery structures are understandable, credible, accessible, and workable from the perspective of those who will interact with them in practice
- Identify where delivery models may create barriers to participation, confusion around responsibilities, or challenges around trust and accountability. This is particularly important for projects that rely on ongoing user participation, behaviour change, long-term service relationships, or collaboration with community organisations and local intermediaries.
- Help identify where delivery models that appear efficient institutionally may create unintended barriers, confusion, or trust issues in practice.

Engagement approach: shape practical delivery arrangements

At this stage, engagement is often most valuable to help select the delivery model as it tests how delivery models will function operationally and how they will be experienced by those interacting with them and how it will be rolled out.

Compared to earlier stages, engagement is typically more focused on governance, operational relationships, accessibility, accountability, and implementation realities rather than strategic direction or project prioritisation. Approaches are most useful when they help clarify responsibilities, test delivery assumptions, strengthen coordination, and ensure that delivery models can function effectively in real-world contexts.

In many cases, engagement at this stage involves a combination of institutional collaboration and targeted insight from affected users or communities that should continue through the delivery model lifespan.



Suggested methods

6.Community-led & peer-based approaches

Working with peer networks to identify where additional support, communication, or local coordination may be required and test the role community organisations or intermediaries may play within delivery.

10. Digital & hybrid engagement

Leafletting with shared branding to share the delivery model and invite feedback, for example Bristol Leap.

11. Key actor & partnership-based engagement

Partnership forums or similar to clarify how different organisations and delivery actors will work together and identify potential gaps or overlaps in responsibilities (key actors can also join co-design).



8. Targeted / insight-driven engagement

Testing assumptions around uptake, affordability, participation, disruption or behaviour and testing how users will interact with delivery entities or service providers.



For more detail see Methods Table in
STARTING THE CONVERSATION GUIDANCE

KEY CONSIDERATIONS

- Be clear about which aspects of delivery arrangements are open to influence and which are constrained by funding, legal, regulatory, or commercial requirements
- Ensure engagement remains focused on areas where community or stakeholder insight can meaningfully improve delivery outcomes
- Recognise that delivery models which appear operationally efficient may not always feel accessible or trustworthy from a user perspective
- Consider how governance, ownership, and accountability arrangements may affect public confidence and participation
- Ensure community organisations or intermediaries involved in delivery have sufficient capacity and support
- Avoid overcomplicating engagement on highly technical or specialised issues where there is limited scope for influence
- Maintain continuity with earlier engagement and ensure delivery arrangements reflect previously identified priorities, barriers, and concerns
- Ensure engagement findings are translated into operational design, governance structures, and partnership arrangements rather than remaining disconnected from implementation decisions





FINANCE, PROCUREMENT AND CONTRACT DEVELOPMENT

Main purpose	Translate delivery arrangements into procurement, funding and contractual frameworks
Typical activities	Procurement design, tender development, contract negotiation, funding agreements, performance specification
Key actors	Procurement teams, legal teams, finance teams, delivery partners, contractors, funders
Main role of engagement	Ensure community priorities and engagement requirements are embedded into delivery mechanisms
Typical engagement intensity	Low. Usually targeted and operational, focused on delivery requirements and implementation.

What is this stage?

Formalising how projects will be funded, commissioned, and delivered in practice. At this point, delivery models and project requirements are translated into procurement strategies, funding agreements, service specifications, contractual obligations, and performance frameworks.

What does it involve?

Securing finance, preparing procurement documentation, defining delivery requirements, evaluating delivery partners, negotiating contracts, and establishing mechanisms for oversight and accountability. Earlier decisions around engagement, accessibility, delivery approaches, participation, and user experience are increasingly embedded into formal contractual and operational arrangements.

Why is community involvement important here?

Procurement and contracting decisions often determine how delivery will actually be experienced in practice. Once procurement frameworks and contracts are agreed, there is usually far less flexibility to adapt delivery approaches, engagement models, or user support arrangements without additional cost or complexity.

Benefits of engagement at this stage:

- Help ensure that delivery partners are equipped, incentivised, and contractually required to deliver engagement and community-facing activity effectively, rather than treating it as a secondary or optional component of delivery
- Ensuring that earlier community insight, priorities, and commitments are not lost as projects move into formal delivery structures
- Helps ensure that procurement specifications, contractual requirements, and performance expectations reflect the realities of how communities are likely to experience services and interact with delivery partners

This is particularly important where projects rely on participation, trust, ongoing engagement, or behaviour change. Contracts that focus narrowly on technical delivery or commercial performance may unintentionally create delivery models that are difficult to access, poorly communicated, or insufficiently responsive to local needs.

Engagement approach: strengthen procurement and delivery requirements

At this stage, engagement is primarily focused on ensuring that community priorities, delivery expectations, and engagement commitments are translated into enforceable delivery arrangements.

Compared to earlier stages, this is less about direct engagement and more about ensuring that the finances and contracting allows for it to be embedding ongoing community involvement and accountability into delivery. This work well if the project has already considered how engagement, accessibility, communication, accountability, and participation will function operationally.



Suggested methods

11. Key actor & partnership-based engagement

Using procurement to embed engagement and accessibility requirements into service specifications and define expectations around communication, participation, and user support.

You might use an advisory board or community steering group to identify how delivery partners will engage with different communities or key actor groups and work with them individually to assess whether delivery partners have the capability and capacity to deliver effective engagement.

8. Targeted / insight-driven engagement

Testing assumptions around uptake, affordability, participation, disruption or behaviour.



6.Community-led & peer-based approaches

Identifying where trusted intermediaries or community organisations may play a role in delivery.



For more detail see Methods Table in
STARTING THE CONVERSATION GUIDANCE

KEY CONSIDERATIONS

- Ensure engagement requirements are clearly specified before procurement processes and contracts are finalised
- Balance specificity with flexibility so delivery partners can adapt approaches to local contexts where appropriate
- Avoid treating engagement as a secondary or standalone workstream separate from delivery performance
- Assess delivery partners' engagement capability explicitly, including experience working with communities and delivering inclusive engagement
- Ensure procurement arrangements reflect the realities of local delivery capacity, particularly where community organisations or intermediaries are expected to play a role
- Be clear about how accountability, feedback, and responsiveness will operate during delivery
- Recognise that poorly designed procurement and contracts can unintentionally undermine trust, accessibility, or participation
- Maintain continuity with earlier engagement and ensure that commitments made during previous stages are carried through into delivery expectations and contractual requirements





DELIVERY, ROLLOUT, EVALUATION AND ONGOING ACCOUNTABILITY

Main purpose	Deliver projects effectively while maintaining trust, participation and accountability
Typical activities	Project rollout, service delivery, communication, customer support, performance monitoring, issue resolution
Key actors	Residents, businesses, delivery partners, contractors, community organisations, oversight bodies
Main role of engagement	Support participation, maintain trust, gather feedback and strengthen accountability
Typical engagement intensity	Medium to high

What is this stage?

Focuses on the implementation and operation of projects in practice. At this point, projects move from planning and design into lived experience, where communities begin interacting directly with infrastructure, services, programmes, and delivery partners.

What does it involve?

Includes both the initial rollout of interventions and their longer-term operation, including how services are accessed, how users are supported, how issues are resolved, and how performance is monitored over time. Delivery often involves coordinating activity across multiple organisations while responding to operational challenges, public feedback, and changing local conditions as projects progress.

Why is community involvement important here?

This is where trust, credibility, and delivery quality become most visible. Communities experience the practical impacts of projects directly, including disruption, communication quality, accessibility, customer support, responsiveness, and whether commitments made during earlier stages are reflected in delivery.

Benefits of engagement at this stage:

- Engagement during delivery helps ensure that projects continue to function effectively in practice. It supports participation and uptake, helps identify barriers and operational issues early, and provides mechanisms for adaptation and continuous improvement as projects are implemented.
- Plays an important role in accountability, maintaining transparency, supporting responsiveness, and ensuring that communities continue to have routes for feedback, oversight, and influence once delivery is underway. Long-term decarbonisation programmes often require ongoing relationships between delivery bodies and communities, particularly where projects involve voluntary participation, behaviour change, or long-term service provision.
- Can help improve uptake, strengthen trust, reduce delivery risks, and ensure that learning from implementation feeds into future delivery and programme development

Engagement approach: support delivery and accountability

Compared to earlier stages, the focus is less on shaping major strategic decisions and more on supporting delivery, maintaining trust, responding to issues, and ensuring that communities can see how projects are performing in practice.

Engagement approaches are most useful when they help people understand what is happening, support uptake, provide routes for feedback and problem solving, and maintain transparency and accountability over time.

In many cases, effective engagement during rollout will depend on what level of engagement has happened before. This is an opportunity to demonstrate that earlier consultation and participation have meaningfully shaped delivery, reinforcing trust and confidence over time. The actual engagement work can then rely on combining clear communication with accessible support structures and ongoing opportunities for communities to raise concerns, share experiences, and influence improvements.

CASE STUDIES

The London Borough of Newham used Participatory Budgeting to give residents direct decision-making power, allocating £1.6 million from the Neighbourhood Community Infrastructure Levy to 157 local projects.

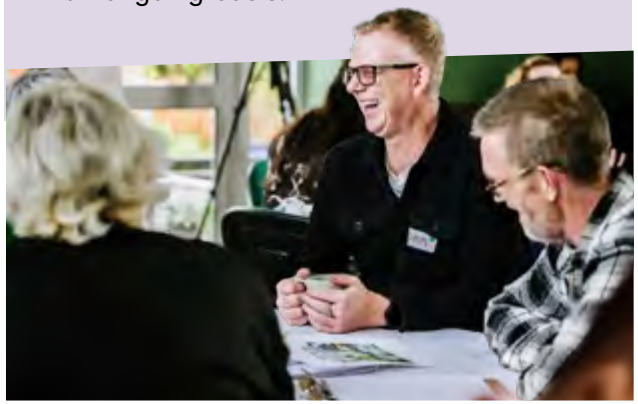
Warwick and Stratford-on-Avon used pop-up stalls in prime street locations and at events to provide a visible council presence, generating positive public feedback and informal engagement.

Camden Council followed their Climate Assembly with a long term Climate Panel that reviewed progress, held the Council to account on delivery and addressed key challenges over the longer term. The group met quarterly and were presented with specific questions and information that they responded to with local context and recommendations.

Suggested methods

4. Participatory delivery and implementation

Using community co-design processes and other community led approaches to work with residents to design and test implementation plans and support residents and businesses through operational or behavioural changes and identifying barriers to uptake, access, or participation on an ongoing basis.



12.Communication, awareness & transparency approaches

Providing clear and timely information about rollout, disruption, and participation requirements including town halls and attending community hubs. Use standard communication channels to respond quickly to emerging issues, complaints, or unintended impacts.



10. Digital and hybrid engagement methods

A web portal for complaints or issues to create visible routes for accountability and oversight and gather ongoing feedback about user experience and delivery quality and capture learning to inform future projects and programme development.



For more detail see Methods Table in
STARTING THE CONVERSATION GUIDANCE

5. Governance, oversight & accountability approaches

Using an existing resident panel or setting up a resident scrutiny panel to develop accountability and feedback mechanisms within delivery arrangements and support continuous improvement and adaptation during delivery.



KEY CONSIDERATIONS

- Ensure engagement remains ongoing throughout delivery rather than ending once projects move into implementation
- Prioritise clear, timely, and accessible communication, particularly where delivery creates disruption or requires active participation
- Build visible and responsive feedback mechanisms that allow issues to be identified and addressed quickly
- Recognise that trust during delivery is shaped heavily by lived experience, responsiveness, and operational quality
- Ensure support and communication approaches are inclusive and accessible to different groups and communities
- Use in person events, door knocking and stands in places where people go alongside digital communication or feedback channels
- Ensure governance and accountability mechanisms remain proportionate but meaningful, particularly for long-term or high-impact projects
- Maintain continuity with earlier engagement and demonstrate how previous commitments and community priorities are being reflected in delivery
- Capture and apply learning from rollout and operational experience to improve future delivery and programme development

04

WHAT THIS LOOKS LIKE IN PRACTICE

This section provides short, practical walkthroughs to show how engagement may work for for different types of area based decarbonisation projects.

We have chosen five different types of project to reflect the range of things that you might be doing:

1. **Creating a strategy**: energy strategy, but it could be a LAEP or a climate action plan
2. **Locally based delivery programme:** Area based retrofit, but could be other behaviour change projects
3. **Technical infrastructure rollout:** EV in an urban environment
4. **Higher impact infrastructure rollout:** Heat network development
5. **Community led delivery:** Solar on a sport centre

For each we have identified the key elements to consider, when engagement is best done and the questions you need to ask. We describe three different levels of engagement dependent on your resources and the level of controversy or impact of a decision.

We recommend that you check the relevant section when starting a project to shape your practical approach, and if you are already midway through, this section provides a useful check-in to see where engagement could accelerate progress and build trust in communities.



4.1 CREATING YOUR ENERGY STRATEGY

In depth engagement is very useful to shape long-term direction, priorities, and visions for place. Examples include LAEPs, climate strategies, transport plans, neighbourhood or area visions or spatial development strategies and sector specific strategic planning.

Communities have a role to play in understanding their area, having a desire and a right to shape their futures and to surface levels of ambition, concerns, tensions and trade offs.

Engagement on strategy can involve setting out principles or recommendations on what needs to be included and is different from defined projects as it will be broader in scope and shape a strategy rather than a specific decision. This can lead to more time passing before communities see a difference, but is great at putting people at the heart of agenda setting.

KEY ELEMENTS AND EXAMPLE RESPONSES

Impact on people and amount of change required	Medium - High (and potentially very high)
Level of input into decisions/ power sharing	Medium
Need for local knowledge	Medium
Level of controversy	Medium (depending on wider community priorities, histories, and levels of trust)

Purpose of this engagement

To generate a local energy strategy that reflects the future hopes of the community and reflects locally specific operational strategies. The local energy strategy will have been developed with the community and areas of tension explored to find most acceptable routes to implementation.

Scope

What are the decisions that need to be made? What would you like to know from residents/ the community? Where are the hard boundaries or 'red lines'?

What do local people want from their community in the future and how can the local energy strategy align best with this?

What are residents' local energy priorities?

This may also include operational/delivery principles and the role of the community in the implementation of the strategy.

When does this need to happen (in the project pipeline)?

1. At the agenda setting phase - when you understand the broad scope of the intended strategy but the details remain open for decision making
2. When the strategy is due a review
3. When parts of the strategy need to be action planned and implemented
4. Evaluation - providing feedback loops for the LAEP and Local Area Energy Plans

Key considerations, incl. risks and mitigation

- Match level of engagement to local political support for net zero
- Have a full picture of previous engagement that has been carried out on related topics. Make sure your engagement builds upon previous work and does not repeat it.
- Take time to scope exactly what the public can influence and what they cannot influence at any given stage. In particular be careful not to overpromise around the delivery of the strategy if that is not in scope as this could lead to an erosion of trust if not clearly managed.
- For strategic level public participation start with place and focus on generating a clear understanding of local peoples' vision for the future and how that can align with the strategy
- Invite meaningful public participation on trade-offs and prioritisation that will impact on everyday life

Who is interested or will be impacted by these decisions?

All local residents, local businesses and wider civil society

THE MINIMUM ENGAGEMENT THAT YOU CAN DO FOR THIS IS...

An open deliberation day or multiple drop-in days. These would be in accessible community venues, with significant local awareness of the day with publicity across general and targeted locations.

The deliberation day should include a wide variety of drop in activities that allow people to quickly take part in exercises that reflect future aspirations, prioritise between a set of choices, and allow for idea generation.

IF YOU HAVE MORE RESOURCE, OR THERE ARE HIGHER CONCERNS IN THE COMMUNITY AND YOU WANT TO BUILD MORE TRUST...

You could create a participatory strategic development group formed of a small number of local residents and key actors who represent civil society.

That group could act as a standing working group alongside you and would be meaningfully complemented by wider engagement outreach including the open deliberation day and potentially using place based community conversation approaches.

IF THIS IS LIKELY TO BE CONTROVERSIAL IN YOUR AREA, OR HAVE A MORE SIGNIFICANT IMPACT ON PEOPLE'S LIVES...

A deliberative and representative process like a citizen assembly or citizen jury would enable a deep level of meaningful public input into the strategy development process and provide legitimacy for your strategy because a group of diverse residents that broadly reflect the local population have been involved in its creation.

This could also lead to a standing residents' panel that convenes around key areas of strategy implementation.

4.2 AREA-BASED RETROFIT PROGRAMME

When you have a project like areas based retrofit that requires the public to make significant changes you need to engage your core audiences in a way that builds trust, uptake and addresses their concerns.

It is important not to tell people what to do but to ask them what their priorities are and work with them to overcome hurdles, such as affordability or disruption. Ensuring that you find the right audience and engage on practical benefits will be important, as will the need to engage specific groups who might need more support or be resistant. This sort of project requires sustained support and conversation rather than one-off awareness raising.

KEY ELEMENTS AND EXAMPLE RESPONSES

Impact on people and amount of change required	Medium - High
Level of input into decisions/ power sharing	Medium
Need for local knowledge	High
Level of controversy	Low - medium (dependent on the politics on housing and equity of access to the programme)

Purpose of this engagement

To ensure that retrofit programmes are fit for local purposes including different groups of people and types of housing.

To support engagement and uptake of retrofit to ultimately support low carbon warm homes.

Scope

What are the decisions that need to be made? What would you like to know from residents/ the community? Where are the hard boundaries or 'red lines'?

Local needs
What kind of support to different people in the area is required to access retrofit.

Engagement needs
How can the retrofit programme best engage with local people to support the uptake of retrofit including: what information they would require and what formats work best; where and how they seek information and support; and what would enable and constrain engagement with the retrofit programme and ultimate uptake of retrofit.

Specific needs
Some types of homes, tenure types (especially private rented), and groups of people will face particular barriers. Decisions need to be made on how to support these specific needs.

When does this need to happen?
(in the project pipeline)

1. Engagement with retrofit installers in advance of retrofit programme design and any subsequent public engagement to ensure local installation needs can be met and scale when you have secured a level of funding for a retrofit programme but have not yet designed the details of the programme
2. Before launching any specific parts of the programme including by retrofit type or target audience
3. Before designing programme communications and engagement
4. Throughout programme delivery to ensure uptake is maximised (engagement to support behaviour change)
5. As part of procurement for installers to ensure they are able to support communicating and engaging residents

Who is interested or will be impacted by these decisions?

Local residents, landlords, retrofit installers

Key considerations, incl. risks and mitigation

- Consider what you already know about retrofit uptake in the area and whether this means you want to target your engagement to particular groups of people
- When engaging residents in the design of retrofit support programmes, ensure you are clear about what is possible (financially, and on the general scope of what you are able to do), and where there may be trade-off decisions to be made (for example, whether higher levels of funding are available to target groups or lower levels of funding are available for everyone).
- Privately rented homes require retrofit buy in from both the landlord and the resident
- Current conditions of houses and links to co-benefits such as addressing damp and mould

THE MINIMUM ENGAGEMENT THAT YOU CAN DO FOR THIS IS...

With the rental industry and retrofit installers – targeted stakeholder interviews with industry intermediaries who represent and have oversight of the industry at a local level (in residential letting and retrofit installation) to understand their opportunities, constraints, and needs.

For engagement to design retrofit programmes – a co-design workshop with residents who broadly reflect the demographics of those you want to benefit from the retrofit programme to determine the areas and properties to be targeted. This would be a one day workshop with between 12 and 30 people who provide input on key elements of design including balancing available financial support, reaching those who will most benefit, and co-designing information and communication.

For engagement to support uptake of retrofit programmes (behaviour change) – a mix of communication, awareness, and transparency approaches including; local and community media engagement; and ongoing communication and updates. The detail of the communication, awareness, and transparency approaches should be guided by insights generated in engagement to design the retrofit programme.

IF YOU HAVE MORE RESOURCE, OR THERE ARE HIGHER CONCERNS IN THE COMMUNITY AND YOU WANT TO BUILD MORE TRUST...

With the rental industry and retrofit installers – a facilitated focus group with a number of people who work in the industry (retrofit installers), and a separate focus group with a combination of lessors and residential lettings organisations to explore local barriers, opportunities, and needs as they arise in their different roles around retrofit. Participants should represent a number of different roles in each industry.

For engagement to design retrofit programmes – a participatory design process where local residents are involved in shaping all aspects of the design of the retrofit programme. Participants might reflect the general public or may be a series of subgroups who represent target communities.

For engagement to support uptake of retrofit programmes (behaviour change) – a mix of communication, awareness and transparency approaches including: public information campaigns; posters, banners and noticeboards; flyers and direct mail; local and community media engagement; and ongoing communication and updates through specified channels

The detail of the communication, awareness, and transparency approaches should be guided by insights generated in engagement to design the retrofit programme and this will also include segmentation and targeting

IF THIS IS LIKELY TO BE CONTROVERSIAL IN YOUR AREA, OR HAVE A MORE SIGNIFICANT IMPACT ON PEOPLE'S LIVES...

For engagement with rental industry and retrofit installers – creation of a multi-stakeholder advisory board that provides sector specific input at various stages of programme design and delivery. This group may also join resident and community participants to either inform public deliberation or codesign the retrofit programme together.

For engagement to design retrofit programmes – an enhanced participatory design process supplemented with community conversations or neighbourhood workshops in targeted communities with particular needs, opportunities, challenges around retrofit. Insights from community conversations would feed into the wider, and the participatory design process participants should be involved in the design of the community conversations. The participatory design process and multi-stakeholder advisory group may also work closely together to co-design the programme.

For engagement to support uptake of retrofit programs (behaviour change) – the engagement to support uptake in this instance should be driven by segmentation informed by what you already know about your communities and retrofit and new insights from the community conversations and participatory design process. This engagement should be targeted and bespoke to meet the needs in terms of both method and delivery. This may include a bespoke mix of communication, awareness, and transparency approaches and utilising spatial and visual engagement, storytelling, and peer-to-peer support in light-touch and/or place based events.

4.3 EV ROLL OUT IN AN URBAN ENVIRONMENT

EV roll out is ostensibly a technical and positioning challenge. However, some form of engagement is needed to ensure local legitimacy, accessibility and equity of provision, and to reflect user needs and patterns of use. There will also be disruption and local impact during the installation phases.

For this type of technical and spatial work we recommend a distinction between strategic decisions (for example, siting and coverage) and user-facing considerations (such as access, pricing, usability). It is also important to clarify roles between council and commercial partner, and transparency about what can be influenced. Communication and targeted engagement to support trust, manage concerns, and ensure local fit is critical as a baseline.

KEY ELEMENTS AND EXAMPLE RESPONSES

Impact on people and amount of change required	Low
Level of input into decisions/ power sharing	Low
Need for local knowledge	Medium
Level of controversy	Medium (based on available space)

Purpose of this engagement

To deliver a smooth roll out of energy charging that meets the needs of the community now and in the future, that is commercially viable and is supported by the community. Meets with the constraints and opportunities within any given place.

To identify community opportunities and concerns at an early stage.

Scope

What are the decisions that need to be made? What would you like to know from residents/ the community? Where are the hard boundaries or 'red lines'?

Location/ siting

With a focus on how to mitigate against community concerns.

Design elements

(for example, sizing, speed, neigbourhood continuity or colour)

When does this need to happen? (in the project pipeline)

1. Before you have selected the site (such as design, placing)
2. In advance of any work done (including communications)

Who is interested or will be impacted by these decisions?

Local residents; car users (both EV, non-EV and potential EV); EV charging delivery; landowners; DNO; local businesses

Key considerations, incl. risks and mitigation

- Match level of engagement to local political support for net zero
- Engagement here may often be part of a wider decarbonisation strategy

THE MINIMUM ENGAGEMENT THAT YOU CAN DO FOR THIS IS...

Targeted social media polling to car users in the area. Pop-up stands in local shared spaces. In both cases this should allow residents to input on their needs around EV charging sites and local considerations.

IF YOU HAVE MORE RESOURCE, OR THERE ARE HIGHER CONCERNS IN THE COMMUNITY AND YOU WANT TO BUILD MORE TRUST...

Targeted place based approaches (neighbourhood workshops, drop-in sessions, street engagement, or pop-up stands) in key locations and community groups. As well as allowing residents to input on their needs and local considerations sessions may be able to expand their scope around some of the more specific design, use, or siting considerations.

IF THIS IS LIKELY TO BE CONTROVERSIAL IN YOUR AREA, OR HAVE A MORE SIGNIFICANT IMPACT ON PEOPLE'S LIVES...

A community led co-design process where decision-making power in the design and delivery of local EV charging is shared with local residents. The group should be formed of diverse residents who reflect a variety of views on local infrastructure and who are current and possible future EV users. The group may also engage in wider community conversations.

They should be supported to come together regularly and provided with access to accessible technical information to support their decision making.

4.4 HEAT NETWORK DEVELOPMENT

Although similar in technical nature to EV charging, heat networks have more of an impact on people's lives and will require adjustments in their homes. Engagement is important for legitimacy and local acceptability.

It will also need to address disruption and any requirements for household or building participation where relevant. There is a distinction between strategic siting questions and resident-facing delivery questions and engagement should be designed accordingly. Trust, tangible framing, and ongoing communication will be key. There is also a potential role for peer learning and customer journey support.

KEY ELEMENTS AND EXAMPLE RESPONSES

Impact on people and amount of change required	High
Level of input into decisions/ power sharing	High
Need for local knowledge	Medium
Level of controversy	Medium

When does this need to happen?
(in the project pipeline)

1. Before deciding whether or not to implement a heat network within this community
2. Before any decisions about the structure, governance, day-to-day use, and installation have been made
3. Throughout the decision-making, design, and installation process
4. Once the community has transitioned to a heat network as part of governance and communication

Purpose of this engagement

To engage residents whose homes will be served by the heat network to maximise buy in to the network by ensuring that:

- they are able to discuss and decide on key design elements for the heat network and conditions of acceptability
- they have the information needed to ensure a smooth transition to the network
- the design of the network supports residents broader aspirations
- the design of the network is equitable
- installation works are carried out according to principles developed by local residents to ensure broad acceptability of disruption

Scope

What are the decisions that need to be made? What would you like to know from residents/ the community? Where are the hard boundaries or 'red lines'?

- Does this community want a heat network in order to increase energy security, reduce carbon emissions, and support the transition to a low carbon neighbourhood?
- How will prices be set, billing administrated, and how will costing remain transparent?
- What maintenance standards should be adhered to?
- How can home comfort be maintained across all homes within the network including where they have different heating needs?
- Who is going to govern ongoing decisions made in respect of the network including residents?
- What are residents' concerns and how can the design of the network mitigate these? What can increase their support (for example, what conditions can be embedded within the design of the network)?
- What do residents need during the installation process including information and communication, support for vulnerable residents, and whether there are any broader principles for installation that will minimise disruption for residents?

Who is interested or will be impacted by these decisions?

Residents, businesses, and civil society in all local homes and properties in the network area

Key considerations, incl. risks and mitigation

- Heat networks are a significant change and those who will be impacted by this decision should be able to weigh up the information and decide whether or not to proceed with a heat network for their area with awareness of the benefits and drawbacks
- Maximum participation in the details of a heat network scheme will support it to be as equitable, fair, and broadly supported as possible



THE MINIMUM ENGAGEMENT THAT YOU CAN DO FOR THIS IS...

The initial decision on whether to proceed with a heat network should be made with the whole community. A series of drop-in events should allow all affected to access information from a range of sources that set out both the benefits and drawbacks of heat networks and the areas of design that would be open to decision making.

This should lead to an inclusive local poll to decide whether or not to go ahead with the network. The decision-making authority should be clear on the scope of the poll and it should include the opportunity to explain what considerations may support residents.

If the community is to proceed with a heat network at minimum collaborative planning workshops should be convened at key decision points.

IF YOU HAVE MORE RESOURCE, OR THERE ARE HIGHER CONCERNS IN THE COMMUNITY AND YOU WANT TO BUILD MORE TRUST...

A deliberative workshop with a diverse group of local residents who will weigh up the benefits and drawbacks and make a decision on whether to proceed with a heat network.

The local residents should be broadly reflective of the population of the community but to ensure that everyone has a chance to feed into decision making a community-wide survey and drop in event should be held first. Insights from this wider engagement should inform the decision-making workshop.

IF THIS IS LIKELY TO BE CONTROVERSIAL IN YOUR AREA, OR HAVE A MORE SIGNIFICANT IMPACT ON PEOPLE'S LIVES...

The process by which the community decides whether or not to have a heat network should be co-designed by local people. If particular groups have convened around opposition or support they should be included in the process of deciding a decision-making process that is fair and inclusive to everyone.

There should be resources to enable the implementation of the decision-making process which may include a combination of different information methods and outreach, information from a variety of sources, drop-in opportunities, deliberative dialogues, and polling or voting.

If the community proceeds with a heat network, in this instance part of the decision-making process should be a decision on how the community wants to be engaged across the decision-making life-cycle. This may include a community led design process that may also incorporate elements of Place based or community engagement to broaden insights, and the creation of standing resident led governance.

In all of the above levels of public participation transparent and accessible communications are essential.

4.5 COMMUNITY ENERGY OR COMMUNITY-LED DELIVERY → SOLAR ON A SPORTS CENTRE

There is a big focus on community energy and community based assets. This needs a different form of engagement that builds ownership, partnership, local capacity and sets projects up for co-delivery and local benefit. This is as much about understanding and building the strengths of community organisations, with councils taking a role in enabling, supporting, and structuring partnership. We have used solar on a sports centre as a possible example of this.

KEY ELEMENTS AND EXAMPLE RESPONSES

Impact on people and amount of change required	Low
Level of input into decisions/ power sharing	High for specific groups (e.g. the sports centre)
Need for local knowledge	Low
Level of controversy	Low

Purpose of this engagement

To design a community energy project that has local buy-in, where local people feel motivated to invest, and where benefits for the community are decided collectively.

To ensure that decision making and benefits within the process are not limited only to residents who can afford to invest in the infrastructure.

Scope

What are the decisions that need to be made? What would you like to know from residents/ the community? Where are the hard boundaries or 'red lines'?

Who benefits financially? For example, does it reduce the cost of access to the sports centre, go towards other local projects, infrastructure, or services, or pay returns to local investors.

How might local people invest in the energy project and what might encourage them to do so?

How can benefits be shared fairly amongst the community?

What decisions around design and logistics (including the installation process) need to be considered?

When does this need to happen?
(in the project pipeline)

1. When you have secured agreement from key actors (such as any relevant landowners and utilities network).

Key considerations, incl. risks and mitigation

- Match level of engagement to local political support for net zero
- Ensure engagement reaches potential beneficiaries of the scheme even if they are unable to invest to support equitable development.

Who is interested or will be impacted by these decisions?

Potential local investors including local businesses and individuals, potential local beneficiaries including sports facilities and local charities and users of the venue. Plus local residents.



THE MINIMUM ENGAGEMENT THAT YOU CAN DO FOR THIS IS...

Some form of partnership or advisory group to co-create the resource. We think that co-design is the best approach here. It would need to be supplemented with light-touch engagement with pop up stalls at the sports centre to reach its users and local residents, and quick polls targeted at local businesses, local civil society, and local residents who may be interested in investing. Local and community media engagement to raise awareness of the scheme and engagement opportunities.

IF YOU HAVE MORE RESOURCE, OR THERE ARE HIGHER CONCERNS IN THE COMMUNITY AND YOU WANT TO BUILD MORE TRUST...

As per the minimum but additionally including a series of drop-in sessions over a longer period of time to enable engagement from all who may be interested. This should be supplemented by targeted social media to support reach and more in depth governance arrangements.

IF THIS IS LIKELY TO BE CONTROVERSIAL IN YOUR AREA, OR HAVE A MORE SIGNIFICANT IMPACT ON PEOPLE'S LIVES...

This is a real opportunity for in-depth co-design and participatory budgeting with the relevant partners, community groups and residents. Building on the insights gained from the above methods, convening a collaborative planning workshop amongst potential investors and community beneficiaries to codesign the details of the scheme and support investment.

05

PRACTICALITIES OF MAKING IT HAPPEN

Effective engagement requires more than individual activities or consultation exercises. It depends on organisations having the resources, structures, skills, and internal coordination needed to design, deliver, and use engagement effectively. There are a number of additional things to consider when designing engagement into your project. These are considered briefly here.

5.1 INTERNAL READINESS

Engagement is often recognised as important but under-resourced relative to the role it is expected to play in shaping decisions and supporting delivery. This can result in engagement being introduced too late, delivered inconsistently, or disconnected from decision making and implementation.

Building internal readiness helps ensure that engagement is not treated as a parallel or standalone activity, but as a core part of how projects are planned, delivered, and governed.

Key questions to ask about organisational readiness

5.2 APPROPRIATE BUDGET AND RESOURCING

Engagement should be resourced proportionately to the scale, complexity, and importance of the project or programme. This includes thinking beyond the direct cost of engagement activities themselves and considering the wider time and capacity required to plan, coordinate, analyse, and respond to engagement effectively.



In practice, resourcing may include:

- staff time and internal coordination
- communications and outreach support
- facilitation or specialist expertise
- accessibility and inclusion measures
- participant support or compensation where appropriate
- analysis and reporting
- ongoing engagement during delivery and implementation

Capacity is often as important as budget. Internal teams may not have sufficient time, ownership, or expertise to manage engagement effectively. Engagement is frequently delivered alongside other responsibilities, which can make it reactive or fragmented if responsibilities are unclear.

Long-term continuity also matters. Short-term or one-off funding can make it difficult to maintain relationships and support ongoing engagement across longer delivery programmes.

Checklist 1: Creating internal buy-in checklist

Table 1: Benefits of engagement

Template 1: Making the case to different stakeholders

5.3 ROLES, RESPONSIBILITIES AND SKILLS

Engagement typically involves a range of teams and functions across an organisation. Without clear ownership and coordination, activities can become fragmented or disconnected from delivery and decision making.

Depending on organisational structures, engagement responsibilities may sit across strategy, communications, planning, delivery, programme management, or dedicated participation teams. External partners may also play an important role in facilitation, outreach, or specialist engagement delivery.

Responsibilities need to be clear, coordination strong, and engagement connected to project development and decision making, and insights are able to feed meaningfully into delivery processes. Engagement skills are not only needed by engagement specialists. Teams responsible for procurement, governance, strategy, and delivery also need to understand the role of engagement and how to use its outputs effectively.

Table: Roles and responsibilities needed for effective engagement

5.4 EMBEDDING ENGAGEMENT INTO DELIVERY SYSTEMS

Embedding engagement means ensuring that engagement is connected to governance structures, project development processes, procurement arrangements, and implementation planning from the outset. In practice, this may include:

- building engagement milestones into project timelines
- linking engagement outputs to decision-making processes
- ensuring procurement and commissioning reflect engagement expectations
- establishing oversight and accountability arrangements
- coordinating engagement across teams and programmes
- maintaining clear feedback loops with participants and stakeholders

Procurement and commissioning are particularly important points at which engagement can either become embedded into delivery or become disconnected from it. The way engagement is specified in briefs, contracts, and delivery expectations has a significant influence on what happens in practice. Clear expectations can help ensure that engagement remains meaningful throughout implementation.

This requires consideration of:

- inclusion and accessibility
- feedback loops
- communication standards
- quality of facilitation
- how engagement findings should inform delivery

Coordination across teams and programmes is equally important. A joined-up approach can help create a more coherent experience for participants while making better use of limited organisational resources.

See chapter 2: Creating an engagement strategy

5.5 ENGAGEMENT PROCUREMENT AND COMMISSIONING

You are likely to need support to deliver some of the specialist services outlined in this report. Many organisations delivering this sort of services are open to informal conversations in advance of formal procurement, they can also help with advising on the overarching strategy for engagement. Once you get to procurement, ways to reflect flexibility are important as you will often need to adapt activities as you go along. Willingness of contractors to work across engagement are also important.

Tool: Engagement Procurement & Commissioning Checklist

5.6 WORKING WITH PARTNERS AND INTERMEDIARIES

Many authorities work with external partners and intermediary organisations to support engagement activity. This may include community organisations, charities, community energy groups, housing providers, faith groups, local networks, specialist engagement practitioners, or other organisations with existing relationships and local knowledge.

Working with partners can significantly strengthen engagement, particularly where organisations already have trusted relationships with communities or can help reach groups that may be less likely to engage through formal council-led processes alone.

In some cases, external partners or independent advisers may also help strengthen the perceived fairness or legitimacy of engagement processes, particularly where projects are sensitive or contested.

Partnership approaches also require careful design and oversight. External organisations do not automatically provide representative reach or inclusive engagement, and over-reliance on a small number of intermediaries can unintentionally narrow participation or reinforce existing gaps in representation.

Partners and intermediaries can support engagement in a range of ways depending on the context and their existing relationships, expertise, and capacity.

This may include:

- outreach and recruitment
- facilitating discussions or workshops
- supporting communication and translation
- providing contextual insight into local priorities or concerns
- advising on inclusive engagement approaches
- acting as trusted messengers or local champions
- supporting co-design or community-led activity
- helping maintain longer-term relationships during delivery

In practice, different organisations will have different strengths, networks, and limitations. Some may have strong relationships with particular communities or neighbourhoods but more limited reach elsewhere. Others may have technical expertise but less experience facilitating inclusive participation.Understanding these differences is important when deciding:

- why particular partners are being used
- what role they are expected to play
- and where additional engagement approaches may still be needed

Table: Roles and responsibilities needed for effective engagement

5.7 ENSURING FOLLOW UP

Trust is shaped not only by the engagement activity itself, but by what happens afterwards. People are more likely to continue engaging when they can see that their input has been heard, considered, and connected to visible outcomes or decisions. Without clear feedback and continuity, engagement can quickly feel extractive, particularly where communities have experienced repeated consultation or engagement processes with limited visible change.

Building trust therefore requires more than a single engagement exercise. It depends on maintaining clear feedback loops, responding visibly to concerns and questions, and demonstrating how engagement connects to wider delivery and decision-making processes over time.

In practice, this may include:

- providing clear updates on what was heard and how it informed decisions
- maintaining ongoing communication during delivery and implementation
- creating routes for continued feedback and accountability
- ensuring people understand what happens next following engagement activities

This is particularly important for longer-term decarbonisation programmes, where communities may be involved across multiple phases of planning, development, and delivery.

Checklist: Engagement follow up



06

CONCLUSION

Decarbonisation interventions and projects require public support, participation, behaviour change, local legitimacy, or coordination across multiple local actors.

This requires an overarching engagement approach and strategy to move beyond one-off consultation exercises and instead support delivery throughout the lifecycle of projects and programmes. The need is to think strategically about engagement in relation to your overall strategy, rather than selecting methods in isolation.

This playbook shows how engagement evolves across the delivery journey. Early engagement supports strategic outcomes and can help shape and sometimes reduce the need for engagement later on in a project. However, some form of engagement is required at each stage with different actors, purposes and tools.

We encourage you to work with the playbook, its practical approach and the accompanying toolbox to ensure that you are applying a meaningful, inclusive, proportionate engagement approach that centres people who will be impacted at the heart of your project, thus ensuring long term success.



6.1 RESOURCES AND REFERENCES

Energising Britain: Your voice in our Clean Energy Superpower Mission.
Department of Energy Security and Net Zero (DESNZ)

Local Power Plan.
Great British Energy. February 2026.

'Establishing a climate communications and engagement baseline for public bodies'.
Net Zero Hubs

Net Zero Go

Innovate UK's Net Zero Living Programme

Cost of Not Engaging: reducing financial risk with public participation.
Innovate UK, April 2026.

Apathy and Opposition: Understanding the Real Threats to Net Zero.
Becca Massey-Chase, Steve Akehurt and Sam Alvis, IPPR, March 2026

Westminster Climate Assembly final report
November 2023

Climate Assemblies: Emerging Trends, Challenges and Opportunities A Report of the Knowledge Network on Climate Assemblies.
Graham Smith, KNOCA, June 2025

Citizens White Paper.
Involve and Demos. Miriam Levin, Polly Curtis, Sarah Castell, Hana Kapetanovic, July 2024.

Climate Barometer Tracker: MPs and the public continue to underestimate local backing for wind, solar and pylons

Public Engagement for Net-Zero: A Literature review.
Centre for Public Impact and Calouste Gulbenkian Foundation (UK Branch).

Public Engagement on Climate Change: A Case Study Compendium.
Centre for Public Impact and Calouste Gulbenkian Foundation (UK Branch).

How place-based citizen engagement can shape a positive decarbonised future for the UK.
Involve, IPSOS, Forum for the Future and Quantum.

Local Climate Engagement Resource Hub.
Involve and UK100



COMMUNITY ENGAGEMENT TOOLBOX

A. TOOLS FOR MAKING THE CASE

These tools relate to section 2 of the playbook on making the case.

CHECKLIST 1

CREATING INTERNAL BUY-IN

- ☑ Think about engagement at the very start of the project as a necessary component of delivery
- ☑ Identify your key actors and what is important to them
- ☑ Tailor your arguments to different teams who may view engagement differently (use suggested framing and table of benefits)
- ☑ Engage elected members and senior leadership on the role of engagement in reducing delivery risk and improving outcomes
- ☑ Align engagement objectives with broader political priorities (e.g. fairness, cost of living, local economic benefit)
- ☑ Secure agreement on the level of community influence (e.g. consult vs collaborate vs empower)
- ☑ Identify resource requirements (budget, staffing, external support)
- ☑ Establishing internal governance and accountability structures for engagement
- ☑ Clarify roles across departments (e.g. climate, planning, communications, housing)
- ☑ Position engagement within wider strategies (e.g. climate action plans, regeneration, inequality agendas)



TABLE 1

BENEFITS OF ENGAGEMENT

ENGAGEMENT ENABLES...	OUTCOMES	RATIONALE	EVIDENCE AND EXAMPLES
Grounding technical plans in local reality	Stronger local alignment Project quality	LAEPs are often developed through complex modelling and data analysis. It can sometimes produce plans that feel top-down or disconnected from local realities. Engaging communities helps bring lived experience and local knowledge into the planning process. Residents can highlight practical barriers, local priorities, and social dynamics that technical modelling may overlook. Community energy groups can contribute valuable experience and grassroots innovation, helping ensure that plans reflect local aspirations and opportunities. Without this input, local authorities risk creating plans that contain significant "blind spots". Policies and projects may prove difficult to implement because they fail to reflect how people actually live, travel, and use energy in a place.	Citizen visioning processes in 14 Local Authorities resulted in a 20% increase in participants' understanding of their Council's net zero approach.
Reducing delivery risk and building public support	Smoother delivery Reducing opposition, delays and redesign costs Increasing long term delivery effectiveness	Engagement plays a crucial role in managing delivery risks. When communities feel decisions are imposed on them, projects can face opposition, and delays. Early and meaningful engagement helps residents understand the trade-offs involved in energy transitions and gives them a role in shaping decisions about where and how infrastructure is delivered. This can build a stronger democratic mandate for change and reduce the risk of planning disputes or project rollbacks. This is particularly important given the well-documented "social gap": while many people support renewable energy in principle, opposition often emerges when specific projects are proposed locally. Bringing communities into the	A KNOCA study of the first few national climate assemblies published in October 2023 shows that participants more willing to propose the regulation of individuals and businesses rather than relying on market incentives or voluntary action. 2024 Research from Climate Citizens/ Lancaster University shows that giving people a say in policies that affect them can increase the chance that those policies will be successful. Deliberative methods can improve policymaking by obtaining the input of people who are directly affected by policies, but who are not usually engaged in the policy design process.

ENGAGEMENT ENABLES...	OUTCOMES	RATIONALE	EVIDENCE AND EXAMPLES
		conversation early helps close this gap and avoid costly conflicts later. When engagement is missing or treated as an afterthought, councils are far more likely to face public hostility, reputational damage, and delays to infrastructure delivery.	The recent cost of not engaging report explored case studies that showed additional costs of up to 300K as a result of lack of engagement. These costs included additional officer time; judicial review; legal fees; additional maintenance costs and unrecovered costs on failed projects.
Supporting behaviour change	Greater uptake of schemes More effective design of actions	A significant share of emissions reductions rely on households and businesses adopting new technologies, such as heat pumps, insulation upgrades, and electric vehicles. However, these technologies are often unfamiliar and difficult to navigate. Engagement helps translate abstract climate goals into tangible benefits that matter to residents, such as warmer homes, lower energy bills, and improved comfort. Working with trusted community intermediaries—such as local energy champions or community organisations—can also help build confidence and provide peer-to-peer advice. Without this support, residents may feel confused or disengaged from the transition, slowing the adoption of low-carbon technologies and undermining the effectiveness of decarbonisation policies	After Climate Assembly UK, 91% of assembly members made 1 or more climate-friendly changes to their lives since taking part; and that at least 49% had made 10 or more changes. These ranged from paying more attention to climate change in the news, reducing meat and dairy in their diets, changing how people travelled and insulating their homes. Assembly members said the majority of these changes were 'contributed to' by taking part in the assembly. Citizen visioning in Gateshead resulted in a 20% increase in participants who understood their District Heat Network and plans to decarbonise energy. A lack of engagement resulted in only 5% of the target number of homes being retrofit in one of the case studies in 'Cost of not engaging'.
Delivering a fair transition	Reaching 'seldom heard' groups Insights from those most impacted	Meaningful engagement is also essential for ensuring the transition is fair. If engagement processes only reach the most vocal or well-resourced groups, decarbonisation strategies risk overlooking the needs of low-income or vulnerable communities.	Participatory engagement using inclusive recruitment methods has been shown to reach more diverse groups than traditional consultation and engagement approaches.

ENGAGEMENT ENABLES...	OUTCOMES	RATIONALE	EVIDENCE AND EXAMPLES
		By involving a wider range of voices in the design of energy plans, councils can identify barriers faced by different groups and design interventions that address fuel poverty, health inequalities, and access to new technologies. Community-owned energy initiatives can also create localeconomic benefits by retaining revenue within the local economy, supporting jobs, skills, and local services. Without deliberate efforts to include diverse communities, the transition risks widening existing inequalities. More affluent households may adopt low-carbon technologies quickly, while others remain locked into more expensive fossil-fuel systems. This can erode trust and weaken public support for climate policies.	
Maintaining trust and legitimacy	Stronger social legitimacy and public trust	Engagement plays an important role in maintaining public trust. When residents feel decisions are made without their input, engagement processes can appear tokenistic and undermine confidence in local authorities. Over time, this can damage relationships between councils and their communities and weaken the legitimacy of climate action programmes. In contrast, transparent engagement processes that clearly explain how public input shapes decisions help build long-term trust and strengthen support for ambitious climate policies.	A 2024 OECD report on trust in institutions shows that while trust in institutions is low, the single biggest factor that influences whether people do trust the government is 'having a say in decision making'. After the Westminster Climate Assembly, the percentage of assembly members that trusted Westminster Council to act on the recommendations from the assembly grew from 52% to 73%. The number of people who felt listened to by their council grew from 27% to 63%. Research for the Citizens' White Paper from Involve and Demos showed that when people knew a policy has been made with "people like me" trust increased by 10% (35% to 45%).

TEMPLATE 1

MAKING THE CASE TO DIFFERENT STAKEHOLDERS

The tool below helps to map your stakeholders and plan your messaging. We recommend that this is done as a team.

KEY ACTOR (GROUP AND SPECIFIC PERSON)	WHAT ARE THEIR PRIORITIES?	WHAT WILL THEY BE CONCERNED ABOUT	WHAT IS YOUR CASE? WHAT EVIDENCE DO YOU NEED?	WHAT IS THE BEST ROUTE TO INFLUENCE?
Prompts: see list in table X Be as specific as possible	E.g. legacy, reputation; getting stuff done	See common concerns below	See benefits table above	Think about the method. Include who else might influence them

FRAMEWORK 1

ARGUMENTS TO ADDRESS COMMON CHALLENGES

COMMON CHALLENGES/ CONCERNS	GENERIC RESPONSES
It costs too much	Evidence shows that it can cost more to defend decisions where the public is not involved properly.
It will take too much time	Project uptake or time to breaking ground can be slowed by public resistance. There are a variety of approaches that can fit with your timeframe.
It is too complex for residents to understand or contribute to. We won't get any useful input	When people come together we see them respect each other's different lived experiences and consider the evidence thoughtfully. Citizens' Assemblies tend to recommend more balanced, measured ideas than the often polarised, back and forth arguments we see elsewhere in our politics and public sphere. When trusted to make a contribution, all of us rise to the responsibility of finding common ground.
It is too risky to engage residents	This is a way to understand more about community concerns and be able to address the risks. Being in the dark is much more risky.
There is too much public opposition/ the process will get co-opted by the loudest voices	Deliberative processes are designed specifically to recruit a 'mini public'. Using processes like sortition enable you to recruit a reflective sample of a population that bring a range of different opinions. Independent facilitation and clear conversation guidelines also address this challenge.
This is the role of elected representatives	In most cases, politicians still make the ultimate decision and retain accountability; assemblies and other forms of engagement offer informed public judgement on otherwise divisive, complex issues, helping politicians make the right decisions for their area or project.
There is engagement fatigue	Fatigue is normally due to nothing changing, or over engagement at key moments. Strategies to address that include: • Recognising cumulative demands on residents, community groups, and local partners • Avoiding repeated engagement with the same people and organisations • Coordinating engagement across programmes and teams where possible • Being selective about where deeper engagement is most valuable • Designing engagement to be meaningful and connected to decisions • Respecting participants' time and avoiding extractive approaches

TABLE 2

ENGAGEMENT APPROACHES THAT CAN BE USED TO MAKE THE CASE

There are different routes to sharing that message. For some, a written brief will support a conversation or enable a meeting, while others may come to a meeting with their peers. The table below shares a few approaches.

Communication, awareness & transparency	Communication, awareness & transparency play a central role in building internal understanding. Plain-English explainers, internal briefings, and clear articulation of engagement outcomes (e.g. “you said, we did” from other areas) help translate abstract concepts into tangible value. These approaches are particularly useful in aligning non-specialist stakeholders and building confidence.
Targeted / insight-driven engagement	Targeted / insight-driven engagement can be used internally to understand political and organisational perspectives. For example, targeted interviews or internal workshops with members and senior officers can surface concerns around risk, cost, or public reaction, allowing these to be addressed proactively.
Stakeholder & partnership-based approaches	Stakeholder & partnership-based approaches are critical for internal alignment. Cross-departmental working groups or steering groups help ensure that engagement is not siloed within a single team, but embedded across planning, delivery, and communications functions.
Deliberative-style internal processes	There is also a role for deliberative-style internal processes, particularly where there are competing priorities or concerns about risk. Structured discussions or facilitated sessions with members and senior officers can help build a shared understanding of trade-offs and the role of engagement in navigating them.
Existing committees, advisory groups and governance structures	Using existing committees, advisory groups and governance structures is an important route to reach elected officials and senior teams. They set the tone for the engagement and will support implementation and embedding of your strategy into decision making and governance.

B. TOOLS FOR ENGAGEMENT STRATEGY AND PLANNING

These tools relate to section 2 of the playbook on making the case.

TABLE 3

DIFFERENT TYPES OF ENGAGEMENT ACROSS DECARBONISATION DELIVERY

Different projects, decisions, and stages of delivery require different forms of engagement and different levels of participation. Some activities may focus on understanding local priorities or gathering insight, while others may involve collaboration, co-design, or ongoing participation in delivery.

TYPE OF ENGAGEMENT	MAIN PURPOSE	TYPICAL EXAMPLES	TYPICAL LEVEL OF INFLUENCE
Strategic engagement	Shape long-term direction, priorities, and visions for place	LAEPs, climate strategies, neighbourhood visions, sector-specific planning	Ideally collaborative and participatory, often consultative
Prioritisation and pipeline shaping	Inform sequencing, trade-offs, and where effort should be focused	Area prioritisation, portfolio development, intervention sequencing	Consultative, collaborative, or participatory
Project-specific delivery engagement	Support project design, delivery, participation, and accountability	Retrofit programmes, heat networks, local infrastructure projects	Varies significantly depending on the project and stage

FRAMEWORK 2

ENGAGEMENT STRATEGY & SCOPE

The following framework can be used to clarify the purpose, scope, and design of engagement before detailed planning begins. We recommend that this is done as a team.

AREA	QUESTIONS TO ASK BEFORE DESIGNING ENGAGEMENT
Purpose and objectives	What is the overall aim of the engagement you want to do? Where are you aiming to gather insight, shape decisions, test assumptions, support delivery, build legitimacy, or enable participation?
Decision and scope of influence	What decision or outcome is this engagement intended to support? What is already decided? What remains open to influence? What do we actually need to learn, test, or achieve through engagement?
Internal context	What internal factors may shape the engagement or influence decisions (e.g. timelines, political sensitivities, funding constraints, organisational priorities)?
External context	What else is happening locally that may affect engagement? Are there related projects, consultations, or community activities already underway?
Participants and audiences	Who is most affected by the issue or decision? Who needs to be involved? Are there groups who may face barriers to participation?
Value to participants	Why would people want to participate? What is locally relevant or meaningful from their perspective? What role do we want communities or stakeholders to play?
Timing and sequencing	When does engagement need to happen to meaningfully influence decisions? Will multiple stages of engagement be needed over time?

AREA	QUESTIONS TO ASK BEFORE DESIGNING ENGAGEMENT
Resources and capacity	What budget, staff time, skills, and delivery support are available?
Communication and accessibility	How will engagement be communicated? What accessibility or inclusion measures may be needed?
Decision-making and feedback	How will insights feed into decisions? How will participants be updated on outcomes and next steps?
Risks and mitigations	What risks could affect the engagement process or its credibility? What are the risks if engagement is not done well? How will these be managed?
Success measures	What would successful engagement look like in this context? How will this be evaluated?

This framework is intended to support:

- internal planning
- commissioning discussions
- project scoping
- and alignment across teams and partners

TABLE 4

PLANNING ENGAGEMENT PROPORTIONATELY

PROJECT OR DELIVERY CONTEXT	TYPICAL ENGAGEMENT NEED
High public visibility or direct impact on residents	Deeper and more sustained engagement
Projects requiring participation or behaviour change	Asking people what they want through engagement, designing to meet their priorities followed by communication and support
Complex or contested decisions	More deliberative and collaborative approaches
Strategic planning or prioritisation decisions	Broader engagement to understand priorities and perspectives
Technical or lower-visibility infrastructure projects	More targeted or operational engagement
Well-defined operational delivery	Practical engagement focused on communication and implementation

CHECKLIST 2

KEY QUESTIONS TO ASK BEFORE SELECTING ENGAGEMENT METHODS

- ☑ What do we actually need participants to help us understand, test, shape, or decide?
- ☑ What level of participation or influence is realistic in this context?
- ☑ Which groups are most important to involve, and what barriers might they face?
- ☑ How complex, contentious, or visible is the issue?
- ☑ Will one method provide sufficient insight, or is a combination of approaches needed?
- ☑ How will engagement methods need to evolve over time as delivery progresses?
- ☑ What level of engagement is proportionate to the scale and impact of the project?
- ☑ Are there existing relationships, networks, or previous engagement activities that can be built upon?

CHECKLIST 3

INCLUSION CHECKLIST FOR ENGAGEMENT DESIGN

This checklist is intended to support officers in designing or procuring engagement approaches that are more inclusive in practice. It is not a comprehensive solution, but a practical tool to prompt consideration of key factors when planning engagement.

☑ Who needs to be involved?

Consider who is most affected by the project or decision, and which groups are least likely to engage through standard approaches. Identify where targeted outreach is needed.

☑ What barriers might exist?

Identify financial, practical, digital, and accessibility barriers that may prevent participation. Consider also less visible barriers, such as trust, relevance, or competing priorities.

☑ How will participants be reached?

Move beyond open invitations. Consider targeted recruitment, the use of intermediaries, or approaches such as civic lottery where appropriate.

☑ Are multiple routes into participation available?

Ensure that people can engage in different ways, including online and in-person, formal and informal, and at different times.

☑ Is the approach accessible?

Check that communication is clear and jargon-free, formats are appropriate, and venues and platforms are accessible. Consider physical, sensory, cognitive, and digital accessibility.

☑ How are you supporting participation?

Consider whether participants are being compensated for their time, and whether costs such as travel, childcare, or digital access are being addressed.

☑ How are you prioritising inclusion?

Given constraints, be explicit about which groups are being prioritised and why, and what risks remain in terms of who is not being reached.

☑ How will inclusion be monitored and improved?

Plan how you will track participation, identify gaps, and adapt your approach during delivery. Ensure that learning is captured and applied to future engagement





C. TOOLS SUPPORTING THE PRACTICALITIES

These tools relate to section 5 of the playbook on the practicalities of making it happen.

CHECKLIST 4

KEY QUESTIONS TO ASK ABOUT ORGANISATIONAL READINESS

- ☑ Do we have sufficient internal capacity and time to deliver this engagement well?
- ☑ Who is responsible for engagement design, oversight, and decision-making?
- ☑ How will engagement insights feed into governance and delivery processes?
- ☑ What engagement skills or expertise are needed internally or externally?
- ☑ How will engagement be coordinated across teams, programmes, or delivery partners?
- ☑ What needs to be embedded into procurement, commissioning, or governance arrangements?
- ☑ How will accountability and feedback loops be maintained over time?



TABLE 5

ROLES AND RESPONSIBILITIES NEEDED FOR EFFECTIVE ENGAGEMENT

PROJECT OR DELIVERY CONTEXT	TYPICAL ENGAGEMENT NEED
Strategic leadership	Setting direction, ensuring organisational alignment, supporting accountability
Engagement leads or participation teams	Designing and coordinating engagement activities
Communications teams	Messaging, accessibility, public information, and outreach
Project and delivery teams	Integrating engagement into project development and implementation
Analysts and researchers	Interpreting findings and identifying key insights
Community partners	Outreach, facilitation or community connections
Engagement specialists	• facilitation and relationship management • inclusive engagement design • communications and framing • stakeholder engagement • translating technical information into accessible formats • deliberative or co-design approaches • behaviour change expertise where relevant

CHECKLIST 5

ENGAGEMENT PROCUREMENT & COMMISSIONING CHECKLIST

This checklist is designed to help authorities embed clear engagement expectations into procurement, commissioning, and delivery arrangements. It can be used when:

- scoping engagement activity
- developing briefs or tender documents
- assessing proposals
- appointing delivery partners
- reviewing engagement requirements within wider project delivery contracts

AREA	QUESTIONS TO CONSIDER
Purpose	☑ Is the purpose of the engagement clearly linked to a project stage, decision, or delivery objective?
Scope of influence	☑ Is it clear what participants can and cannot influence?
Target participants	☑ Are the relevant communities, stakeholders, or participant groups clearly identified?
Inclusion and accessibility	☑ Are expectations around inclusion, accessibility, outreach, and participant support clearly specified?
Engagement approach	☑ Is there sufficient clarity about the required engagement approach while allowing flexibility where appropriate?
Skills and capability	☑ Are providers expected to demonstrate relevant engagement, facilitation, or community engagement experience?
Feedback and accountability	☑ Are there clear expectations around feedback loops and reporting back to participants?
Outputs and outcomes	☑ Are deliverables focused on meaningful insights and outcomes rather than simply reporting activities completed?
Governance and oversight	☑ Are reporting lines, decision-making processes, and quality assurance arrangements clear?
Integration with delivery	☑ Is engagement clearly connected to wider project delivery and implementation processes?

TABLE 6

ROLES AND RESPONSIBILITIES NEEDED FOR EFFECTIVE ENGAGEMENT

There are a range of both benefits and risks when working with intermediaries. Partnership working should therefore be approached strategically rather than assuming that any community-based organisation automatically represents all local perspectives

POTENTIAL BENEFITS	POTENTIAL RISKS OR LIMITATIONS
Existing local relationships and trust	Uneven reach across different communities
Better access to some underrepresented groups	Over-reliance on a small number of organisations
Local contextual insight and lived experience	Variable capacity or engagement capability
Increased credibility and local legitimacy	Limited continuity if organisations or staff change
Additional outreach or facilitation capacity	Potential gaps in accountability or coordination
Stronger community ownership and participation	Risk that some voices remain excluded

CHECKLIST 6

KEY QUESTIONS TO ASK BEFORE WORKING WITH PARTNERS

- ☑ Why are these particular partners being used?
- ☑ Which communities or groups can they reach well?
- ☑ Who might still be excluded or underrepresented?
- ☑ What role are partners expected to play?
- ☑ What support, resourcing, or coordination will partners need?
- ☑ How will continuity and accountability be maintained over time?
- ☑ How will engagement insights and responsibilities be shared across organisations?

FRAMEWORK 3

PARTNER & INTERMEDIARY SELECTION CRITERIA

This framework is designed to help authorities assess potential partners and intermediary organisations that may support engagement delivery. It is intended to support more strategic and transparent partnership decisions rather than act as a formal accreditation process.

CONSIDERATION	QUESTIONS TO EXPLORE
Reach and relationships	Which communities, networks, or stakeholder groups does this organisation engage well?
Inclusion and representation	Who may still be excluded or underrepresented if this organisation is used as an intermediary?
Trust and credibility	Is the organisation viewed as trusted and credible by the communities involved?
Capability and experience	Does the organisation have relevant engagement, facilitation, or community delivery experience?
Capacity and resourcing	Does the organisation have sufficient time, staffing, and support to participate effectively?
Role clarity	What role is the organisation expected to play (e.g. outreach, facilitation, co-delivery, advisory support)?
Continuity and long-term involvement	Can the organisation support engagement over longer delivery timescales if needed?
Coordination and accountability	How will communication, oversight, and decision-making work across partners and delivery teams?

CHECKLIST 7

ENGAGEMENT FOLLOW UP

- ☑ Put together a simple tracker that captures recommendations and tracks your responses
- ☑ Assign responsibility for maintaining the tracker and keeping participants informed
- ☑ Create an internal engagement plan to ensure the organisation is informed and can take action
- ☑ Communicate openly and transparently about what you can and can't do in response to feedback
- ☑ Create a mechanism for ongoing feedback
- ☑ Stay in touch with participants of in depth processes (where there are permissions) as they can become advocates and provide ongoing feedback
- ☑ Report on progress after 6-12 months



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