

GUIDANCE BRIEF

Guidance for Developing, Tracking and Evaluating Impact Pathways for Public Engagement with Energy Transitions

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INTRODUCTION

Energy transitions are deeply embedded in societal, political, and economic structures, with the societal dimensions increasingly recognised as central to timely and successful transitions. Recent research demonstrates that the quality of public engagement and participatory planning is crucial for the acceptability and support of energy technologies and infrastructures, as well as the legitimacy of transition processes¹. The STEPS research project reinforced these findings. While public engagement with energy infrastructure is a rapidly evolving space, there is a recognised need for more systematic approaches to monitoring and impact evaluation. This is a universal challenge but it is fundamental given the tension between accelerating project delivery and meaningfully engaging with communities. The opportunity of broadening public engagement to consider wider energy and climate justice issues beyond infrastructure delivery adds to the complexity – if communities and citizens are empowered through the energy transition, the capacity for action in relation to wider sustainability and climate action can diffuse through society but capturing the impact of these processes is difficult.

There are a number of challenges facing organisations when it comes to monitoring and evaluation of public engagement and public participation processes. Firstly the social domain is difficult to evaluate for impact due to the complexity of different interacting factors that influence social change. Public engagement impacts can be direct (e.g., changes in infrastructure delivery, changes in policy) or indirect (e.g., increased public trust, increased capacity), and can be defined in many ways, making measurement complex. Success can be subjective, depending on whether the goal is raising awareness, public participation, social acceptance, conflict resolution, or policy influence, and different actors (government, industry, civil society) may define success differently, indicating a role for participatory impact planning and evaluation with stakeholders. Time lags are also an issue, with the effects of engagement potentially taking years to materialise, making short-term evaluations insufficient. There is also a lack of standardised evaluation frameworks, with existing evaluation methods often being case-specific and the absence of universally accepted metrics or indicators makes cross-case comparisons difficult. Impact pathways can be a useful way to think about the sequence of activities, processes, and interactions through which an intervention leads to intended and unintended outcomes. Many outcomes of engagement are difficult to quantify and impact pathways can help in mapping the links between activities and their broader social, economic, political or environmental impacts, acknowledging the interlinking influences which make attribution challenging.

Addressing these challenges requires mixed-method evaluation approaches, long-term impact tracking, and institutional commitment to public engagement and to integrating public input into decision-making. A systematic approach to monitoring, evaluation and impact assessment is required to demonstrate effectiveness, articulate the value and impact of engagement activities, and to refine engagement methods and document lessons learned to inform future activities, practices and policies. Evaluation of public engagement activities can be process-orientated (i.e. learnings/feedback on the method or process employed), output-orientated (i.e. no. of engagements and reach, no. of community events/projects, etc.) or outcome/impact orientated (i.e. benefit of intervention and higher-level goals e.g. community actively engaged/participatory planning with community outcomes/impacts through participation in decision making or community benefit funding, acceleration of infrastructure projects, etc.). Ideally an evaluation framework will take all of these aspects into account, drawing on quantitative and qualitative methods and data sources which can be drawn together into a robust impact narrative that includes case studies as supporting evidence.

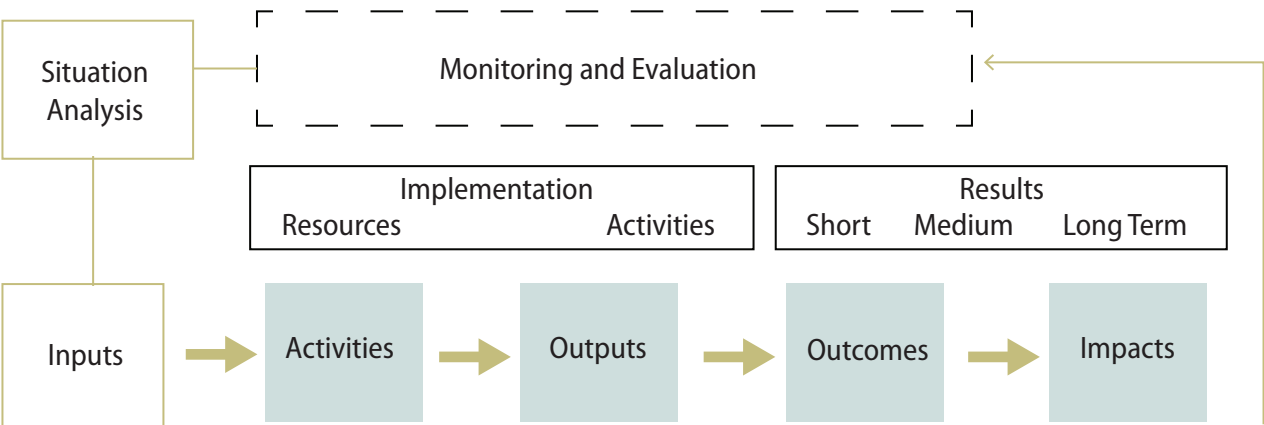
¹ IEA international study investigating 98 case studies found that public engagement can positively impact project development process and its outcomes.

There is also a role for internal evaluation and reflection, to assess how well public engagement is embedded within the culture of the organisation and demonstrate how it is supported throughout all levels of the organisation. This can include training, documenting procedures and presentations/discussions/workshops, feedback surveys, internal reflective practice, and institutional self-assessment or self-reflection toolkits (e.g. [the EDGE toolkit](#), [IAP2 Spectrum of Public Participation](#)) coupled with external validation measures (recognition and awards relating to engagement) and external evaluation.

Ultimately this all requires dedicated resources within an organisation, dedicated support in the public engagement team that works with the managers and practitioners to plan, track and evaluate public engagement activities and develop evidence-based impact narratives which support the value of the activities, internally and externally.

These guidelines are informed by research and good practice in this space and the research undertaken by MaREI with EirGrid in the STEPS project (2022 - 2025), including a review of international literature on good practice in community engagement with energy infrastructure.

EirGrid engages with a wide range of stakeholders and these can include industry, statutory agencies, local authorities, academia, businesses, customers, landowners and civic society; members of local communities, community groups and NGO's. These guidelines are focused on public/community engagement in energy transitions though some are also relevant to broader stakeholder engagement.



IMPACT PATHWAY: FRAMEWORK AND GUIDELINES

An impact pathway outlines the steps and assumptions leading from an intervention to its expected impact. It essentially maps out the proposed causal chain of events and how a project or activity is expected to lead to changes in individuals, communities, organisations, or wider society. It can be usefully presented as a logic model or a theory of change.

STEPS	METHODS
Begin with Reflection & Motivation	<ul style="list-style-type: none"> • Time needs to be taken to consider the purpose of the engagement and the time needed to carry out the agreed actions. • Consider and profile geographical location, mapping of target communities, residential areas, demographics, etc. • Identify what impacts you want to achieve – short term and long term, e.g. local acceptance of energy project, provision/development of more community assets, increased quality of life, health and well-being, contribution to policy/research, job creation, greater engagement in transition technologies, activation, strengthening of equitable and trusted engagement methods, building on existing community initiatives and projects, building community capacity, developing partnerships, increased understanding of community engagement within the organisation, etc. • Create a communication narrative from above to share with communities and internally within the organisation.
Inputs – how are you going to engage based on good practice	<ul style="list-style-type: none"> • Identify specifically what engagement methods will be utilised, e.g. public consultations/information sessions, roadshows, webinars, community forums, focus groups, workshops, social media, videos, meetings, press/newsletter releases, etc. • Note; early engagement with communities assists with building trust and enhances project acceptance. • Note the rationale and desired outputs/outcomes for each. • Consider co-designing engagement methods with the community using independent facilitators and community forums as appropriate. • Be flexible in approaches with community. • Reach agreement on overall approach and methods.
Data Collection Methods	<ul style="list-style-type: none"> • Implement a tracking system to collect data for monitoring and evaluation – this may be a spreadsheet, data dashboard or other data capturing tool. • Identify who is responsible for tracking and how often the tracker will be updated. Capacity and time needs to be dedicated to this task within the Public Engagement Team, i.e. identify dedicated time/role for tracking and reporting. • Identify how often data entry and monitoring reports/updates will be provided, to whom and in what formats i.e. add to meeting agendas or reporting. • Methods for tracking qualitative data need to be designed and tested.
	<p>Quantitative:</p> <ul style="list-style-type: none"> • Baseline data, no. of grant applications, demographics, no. of awards, category of award, % of funding on CBF, forum membership, no. of open days/consultations, roadshows, attendance, feedback, presentations, no. of queries and responses, etc. • Gather a baseline of data including infrastructure project development plans, processes and timelines, perceptions which could be gathered e.g. through short in-person surveys. • Gather longitudinal impact data (CBF). Data would need to be gathered at various intervals, e.g. at the outset, potentially during project delivery phase and after the project is completed. Metrics could include, e.g. levels of project acceptance through surveys or interviews, no. of objections/submissions, timelines, level of social inclusion, community capacity, environmental impacts, etc.

- Gather internal data e.g. no. of personnel involved in Public Engagement – externally and internally, documented training and presentations given.

Qualitative:

- Interviews , qualitative surveys, focus groups feedback, workshops with fund administrators, community liaison officers, community organisations/forum, site visits, projects delivered and follow up with communities months/year later i.e. evaluate using formal feedback forms, interviews – one to one or groups.
 - o E.g. Research Brief on Community Benefit Funding.
- Consider internal organisational survey to assess awareness, understanding and value of community engagement processes.
 - o E.g. Research Brief: EirGrid Reflections on Public Engagement: Practice and Strategy.
- Include reflective learning processes and peer led-validation, e.g. at monthly CLO team meetings or tailored workshops to encourage knowledge sharing, reflection on learnings and challenges. Document the findings.
- Gather longitudinal impact data (CBF) e.g. impact of community engagement on project acceptance, timelines, changes in social inclusion, community capacity, environmental impacts, etc. This could be done before and after project delivery through surveys, interviews, focus groups etc.

Data Collection Methods

- List projects funded and delivered.
- Summarise findings from data collected – quantitative and qualitative. Create infographics and headline reports.
- Testimonials, videos and case studies. Data could be collected and developed by CLO's, fund administrators, and/or commissioned externally.
- Ongoing engagement agreements, including further collaborations and partnerships developed.
- Direct contribution to good practice models and policy.
- Awards achieved: this could be by the community or the energy provider at national/international level.
- Any reports or publications created.

Outputs

- Impact of funded project on immediate community/ environment e.g. CBF projects: new walkways, increased biodiversity, greater engagement nos., etc. This will require follow up by fund administrator as part of their contract e.g. follow up with community forum or funded community project after a period of time has elapsed. A template for follow up, including metrics, should be designed so that comparisons can be made across projects.
- Wider impacts, e.g. restoration project leading to further action and community engagement i.e. diffusion.
- Improved relationship with energy provider, greater acceptance of energy infrastructure projects.
- Delivery of project timeline compared to planned timeline.
- Emerging impacts e.g. increased sustainability practices, building of local partnerships and collaborations, learnings.
- Internal organisational learnings and changes gathered through reflective practice and feedback from any surveys carried out.

Outcomes

Analysis

- The data you have captured above, nos. and thematic findings, organised and presented well visually.
- Comparative analysis across cases can highlight the implementation of community engagement strategy in different contexts. What worked well where and when?
- What are the lessons learnt, challenges arising and responses.

Reporting/ Narrative

- This can be case studies, infographics, guidelines, learning briefs, testimonials, newsletters, stories, videos, photos, across media platforms.
- Report on outputs, processes, learnings and challenges in addition to successes and impacts.
- Revisit sites, communities for updates and follow on.
- Build a longer-term impact case study captured at various intervals.

Development of impact pathways enable a deeper understanding of the relationship between an activity or project's inputs and outputs, and the desired outcomes and impacts of projects. Data gathered through systematic monitoring and evaluation enables good practice to be replicated and improved on in the future based on learnings. The process can also inform changes to strategies and procedures to improve resource and fund utilisation.

Strong monitoring and evaluation also allows an organisation to measure their impact with respect to their strategies and activities, so that the organisation can make better informed decisions drawing on the data as evidence.

GUIDING PRINCIPLES OF ENGAGEMENT – INTERNATIONAL ENERGY AGENCY

Assessing the Impacts of Public Engagement in Energy Infrastructure Projects

An international study across 98 case studies² found that public engagement can positively impact project development process and its outcomes. Nine impact criteria have been defined in their impact assessment framework (see below) which was based on 13 case studies (2 of which were case studies from EirGrid's Public Engagement processes, included through the STEPS research project):

- Inclusiveness
- Timing of engagement
- Ownership
- Information exchange & learning/clarity and transparency of the engagement process
- Trust
- Local/regional added value
- Project development time
- Costs
- Influence on project's final shape and operations

² International Energy Agency UsersTCP Public Engagement for Energy Infrastructure Task report 'Assessing the Impacts of Public Engagement in Energy Infrastructure Projects'

Table 1: Impact assessment framework.

	Indicators	Indicators' explanation	Impact on project	Impact on community
Process	Inclusiveness	Who are the engaged stakeholder groups? Efforts invested (continuum?)		
	Timing of engagement	When are stakeholders enabled to provide / fulfil their potential of participation / contribution the most		
	Ownership	The extent to which actors are being engaged in the participation process (based on levels of participation)		
	Information exchange & learning / clarity and transparency of the engagement process	Accessibility and clarity of information. Availability of common information basis		
	Trust	Institutional trust (stakeholders' trust in institutions) Community / social trust (stakeholders' trust among each other Individual trust (trust among individuals that comprise stakeholders' groups		
Outcome	Local / regional value added	Financial participation / ownership Local benefits (e.g., money to the community / nature-based solutions)		
	Project development time	Timespan between initiation and operation (plans versus real-time, considering engagement efforts) Delays / no delays / extent of delays		
	Costs	Participation costs versus additional costs resulting from bad engagement)		
	Influence on project's final shape & operations	Changes in the amount, size, siting, technology choice / improvements, and design of the RES / infrastructure compared to initial plans.		

The IEA report recommended eight criteria for effective stakeholder engagement processes which EirGrid's public engagement processes are aligned with:

- 1. Be inclusive** while engaging the public and consider outreach to hard-to-reach groups where appropriate.
- 2. Engage the public early and continuously** in the process. Engagement can even start before the planning phase with pre-dialogues.
- 3. Enable the public to become co-owners** of the process by involving them in the decision-making.
- 4. Establish a clear and transparent engagement processes** where information is shared openly. Transparency over the outcomes of the consultation processes, as well as documentation and feedback provision to the community, are crucial (IEA, 2024).
- 5. Build trust** in and between different stakeholders by establishing inclusive, transparent and equitable processes. Without the community trust in the governing authority, or developer, the project is likely to face decisive opposition (IEA, 2024, Evans et al, 2025)
- 6. Consider creating local and regional added value** not only during the construction phase but also in the long-term, for example via employment opportunities, or community funds.
- 7. Have a defined budget** for stakeholder engagement, as costs for stakeholder engagement can reduce potential costs related to project opposition and delays. Track as % of overall project budget. Designing compensation and community fund schemes with the community has greater impact.
- 8. Explain how the results of the engagement processes have influenced the final design, operation and delivery time of the project.** (Project development time – requires tracking of all projects from start to finish (planned v actual) and what helped or impeded project delivery time.

RECOMMENDATIONS FOR DEVELOPING AND EVIDENCING IMPACT PATHWAYS

1. Identify who will be responsible for **impact tracking** within the Public Engagement team – It is recommended that a **dedicated resource/role** is created to work with practitioners to collectively plan, track, reflect and evidence outcomes and impact narratives. Support CPD within PE team.
2. Ensure **senior management support** for public engagement and enhancing internal organisational awareness, understanding and buy-in. Embed public engagement and evaluation into the culture of the organisation.
3. Understand and **document your motivations for community engagement, desired impacts and outcomes** (e.g. logic model, theory of change, impact pathway – for example see this [evaluation toolkit](#)). Consider external support and/or software (e.g. Matter of Focus - [OutNav](#)) on this if needed.

4. Identify the public engagement activities, ideally co-design and agree methods with community potentially through community forums. Plan to engage early and through the lifecycle of the project, considering **opportunities for evaluation** throughout (including via fund administrators, external consultants).
5. Identify **impact indicators/metrics**, evidence sources and data to be collected and how (methods: qualitative and quantitative) and include internal impacts to be monitored in addition to external. Agree the period of data collection and tracking mechanisms.
6. **Present and reflect on data** collected and analysis regularly and develop impact outputs. Be comfortable presenting all aspects of the findings including learnings and challenges. Demonstrate where feedback and learnings have been incorporated or have resulted in changes in approach/process/outcome.
7. Turn analysis into **impact narratives** – short term and long term and include reporting on successes and learnings from a variety of viewpoints, processes, challenges.
8. Take up many and a wide variety of opportunities to **present findings and impact narratives** both internally and externally by senior management, engagement team and CLOs.
9. Consider tasking the CBF **fund administrators** to work with communities on evaluation i.e. embed within the funding/reporting process and follow up. Longitudinal evaluation may also support the illustration of impact over a longer time frame.
10. Consider working with other institutions **to develop a network to share knowledge** and learnings for good practice in public engagement with infrastructure supporting the Climate Action Plan.

Impact Evaluation Indicators:

Quantitative: # engagement activities; # engaged; # CBF projects # downloads (briefs, reports, other); # references (e.g. in gov); # of staff engaging; # trained; survey data; # of consultation responses/objections/submissions;

Qualitative: new/revised policies or procedures in EirGrid; case studies; feedback/testimonials, data from engagement workshops; events pre and post evaluations or surveys (pre/post surveys, feedback forms, etc)

Other: network/consortia growth; partnerships (including research); diffusion;

Economic Indicators: engagement expenditure, jobs created; cost reductions; leveraged funding;

Indicators of Esteem: recognition; awards; boards/panels; internationalisation indicators; any external validation measures;

Digital: website and social media analytics; reach indicators;

Print and Broadcast Media: # press articles; # broadcast/radio interviews; videos.



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