MetroWest Phase 2
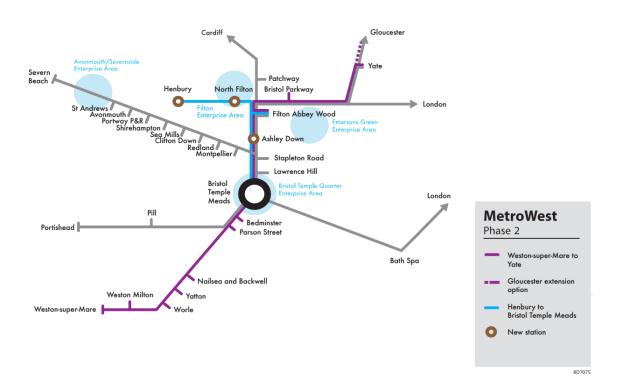# Stakeholder Management and Engagement Strategy

Contents

1. Introduction

1.1. This Stakeholder Management and Engagement Plan is for MetroWest Phase 2.

1.2. This plan is intended to help the Project Team to jointly deliver communications and engagement activities around the project, and to support the development of this project and preparation of the Full Business Case.

1.3. The Plan is intended to be a 'live' document which will be reviewed as the project progresses.

2. Context

2.1. MetroWest Phase 2 forms part of the MetroWest programme, an ambitious programme that will transform the provision of local rail services across the West of England.

2.2. MetroWest is being jointly promoted and developed by the four West of England councils (Bath & North East Somerset, Bristol City, North Somerset and South Gloucestershire Councils). It is included in the current Joint Local Transport Plan, 2011-2026 and the authorities' Core Strategies, and is to be delivered during Network Rail Control Period 5 (CP5 is 2014-2019) and 6 (CP6 is 2019-2024).

2.3. The MetroWest programme will address the core issue of transport network resilience, through targeted investment to increase both the capacity and accessibility of the local rail network. The MetroWest concept is to deliver an enhanced local rail offer for the sub-region comprising:

- Existing and disused rail corridors feeding into Bristol;

- Broadly ½ hourly service frequency (but some variations possible pending business case);

- Cross Bristol service patterns; and

- Providing a Metro type service appropriate for a City Region of 1 million population.

2.4. The Joint Transport Board endorsed the Preliminary Business Case on 16th September 2015 for a scheme comprising new stations at Henbury, North Filton and Ashley Down (served by an hourly service to/from Bristol Temple Meads), plus a Yate turn-back (to permit an increased service frequency at Yate). The JTB also endorsed further work with Gloucestershire County Council to examine the extension of MetroWest services into Gloucestershire. Scheme opening year is 2021.

2.5.   The enhancement of Bristol East Junction (BEJ) is a pre-requisite for the Henbury Line service; Network Rail is seeking to secure funding for implementation in early CP6 (2019/20) although recent briefings are pointing towards Autumn 2021.

2.6.   The MetroWest programme will extend the benefits of strategic transport interventions that are either in the process of being delivered or have been delivered by the West of England councils; these include the MetroBus schemes, Bath Package, Weston Package and the Local Sustainable Travel Fund programme, which will result in better modal integration between rail, bus and active modes, providing an important step towards seamless modal transfer at key hubs across West of England.

3. Purpose

3.1.   Aspirations for rail are high and there is a clear need to explain what is happening, promote understanding and encourage support for proposals across the programme.

3.2.   The purpose of this Engagement Strategy is to set out how we intend to engage with stakeholders and the public during the project, in line with the overall Communications Framework.

3.3.   The Communications Framework for MetroWest is co-ordinated at the Rail Programme Board level and is based on the following principles:

- Specific communication activities are focussed at the right level for particular consultees and stakeholders

- Projects seek an appropriate level of feedback from consultees and stakeholders to be incorporated into the development of MetroWest

- Concerns of potential objectors are addressed as far as possible

- The Core Project Team will be responsible for ensuring statutory consultation meets the requirements for the appropriate process

3.4. The Communications Framework will ensure that:

- communication and engagement activity is embedded within the project and delivers consistent and agreed messages aligned to overall project goals

- the benefits of the project (at the local, as well as regional scale) are clearly communicated, helping to attract support for the scheme that will ultimately enable the relevant consents and permissions to be obtained in a timely and effective manner

- where there may be cases when stakeholders do not support the scheme, the risks are understood and managed

3.5. Best practice suggests that early and effective engagement and communication is beneficial in terms of:

- Ensuring that expectations are managed and that everyone understands the process of scheme development

- Facilitating dialogue with statutory consultees in order to understand and address any potential issues at an early stage

- Providing a framework for developing a relationship with landowners directly affected by the project in order to maximize the opportunity for landowner agreements in the longer term (in order to avoid potential CPO)

- Building understanding about what is being proposed, why and what the positive benefits are, helping to build support from local communities and network users

4. Aims of Engagement

4.1. Effective engagement with stakeholders and the public can lead to better proposals, decisions and outcomes, and help to avoid delivery delays. It also improves confidence in the fairness of scheme development.

4.2. MetroWest Phase 2 incorporates a range of activities, which aim to: -

- Generate an understanding of the requirement for the project and the benefits that it could bring

- Describe the work that is being undertaken

- Understand what issues and concerns arise for different groups of society from the project

- Reach out to parts of society disproportionately affected and those who may not typically engage in the rail and transport debate;

- Continue to positively engage with people to demonstrate the value of their input and make clear what decisions can and cannot be influenced within the context of this project;

- Generate support or acceptance for the project

- Improve the scheme by identifying mitigation measures or refining proposed implementation measures where possible.

5. Key Messages

5.1. The key messages that will need to be clearly and consistently conveyed through communication and engagement activities will be evolved as the project progresses.

5.2. The principal business objectives of the Project are:
- To support economic growth, through enhancing the transport links to the Filton Enterprise Area, North Fringe, Yate, Temple Quay Enterprise Zone and Bristol City Centre.

- To deliver a more resilient transport offer, providing more attractive and guaranteed (future proofed) journey times for commuters, business and residents in the area, through better utilisation of strategic heavy rail corridors from Yate and Henbury.

- To improve accessibility to the rail network with new and re-opened rail stations and improved service frequencies.

- To make a positive contribution to social well-being, life opportunities and improving quality of life (along the affected corridors in particular).

5.3. Supporting objectives are:

- To mitigate traffic congestion in the North Fringe and Yate corridor

- To enhance the carrying capacity of the local rail network

- To reduce the adverse environmental impacts of the local transport network as a whole.

5.4. The message should then continue with the following information points:

- The key aim is to encourage growth and jobs, whilst mitigating any adverse environmental impacts;

- The study will engage stakeholders at an early stage and there will be an opportunity for the public to comment on the project.

5.5. The key messages will need to refer to policy support for the project, in particular that the Joint Spatial Plan includes the scheme within the baseline requirements.

5.6. MetroWest, either in its current or past guises, is incorporated in each of the authorities' Core Strategies as well as the Joint Local Transport Plan. As a result, the scheme has been subject to consultations at various stages in the plan preparation process.

5.7. The adopted South Gloucestershire Supplementary Planning Document (SPD) on the Cribbs Patchway New Neighbourhood (CPNN) states that the requirement of the Council to identify and safeguard sites for railway stations (and associated interchange facilities) along the route of the Hallen line.

5.8. The Local Transport Board prioritised MetroWest Phase 1 for devolved major scheme funding from 2015/16 to be followed by Phase 2, at its meeting on 14th June 2013.

5.9. The Preliminary Business Case for MetroWest Phase 2 was approved by the Joint Transport Board and PTSE Sub-committee in September 2015.

5.10. In July 2010 the West of England authorities, Network Rail, First Great Western, Cross Country and South West Trains signed a memorandum of understanding promoting 'effective co-ordination and co-operation' between the organisations. The key principles were openness, explanation and discussion together with shared responsibility and ownership of problems and solutions.

5.11. In October 2013, Bristol City Council, the West of England LEP, the Homes and Community Agency, English Heritage and Network Rail signed a 25-year memorandum of understanding to 'promote effective co-ordination and co-operation between the

five organisations to achieve the development of Bristol Temple Meads Station as part of the Temple Quarter Enterprise Zone'. Again, the key principles are of 'openness, explanation and discussion together with shared responsibility and ownership of problems and solutions'.

5.12. The project is following the West of England Combined Authority (WECA) process for the development of transport business cases.

6. Statutory Consultation

6.1 As stated above MetroWest, either in its current or past guises, is incorporated in each of the authorities' Core Strategies as well as the Joint Local Transport Plan. As a result, the scheme has been subject to consultations at various stages in the plan preparation process.

6.2 In addition specific consultations have been undertaken for MetroWest Phase 2 in relation to the location of Henbury station and further consultation events will be held when planning applications are submitted.

7. Risks

7.1. As the project progresses it will be important to review the communication and engagement strategy from a risk based perspective.

7.2. Key risks will be added to the initial risk register, which will help to ensure that resources are directed towards areas where there is the greatest potential risk of an influential group not supporting the project.

7.3. It is acknowledged there are significant risks associated with not engaging sufficiently and effectively with key stakeholders and the public. The most significant risk is a lack of understanding about the project.

7.4. There is a risk that more vocal stakeholders and residents are given disproportionate attention and that others who provide inputs to stakeholder events and associated reporting are underrepresented. This requires mitigation through hosting of a diverse range of events in different neighbourhoods, aimed at different demographics.

7.5. There are also risks associated with undertaking engagement over an extended period, as there is a possibility that the pace of technical work will not match planned engagement events. This could generate engagement fatigue, creating frustration among audiences who are not presented with any new information.

7.6. There is also the potential for opposition to any fiscal element of the scheme and such opposition could coalesce and organise, influencing political decisions.

7.7. It is likely that this opposition will exist regardless of the engagement process, but by undertaking a comprehensive engagement plan, there is the potential to alleviate concerns of some opposition and generate a body of support.

7.8. The likelihood of increasing the level of opposition can be minimised by effective messaging and using an approach which not only reaches all audiences that might be opposed, but enables supporters to make their case.

Risk	Mitigation
Lack of support/acceptance from stakeholders for the project	• Ensure benefits (including regional and wider benefits) are clearly communicated • Address stakeholders concerns as far as possible within the objectives of the project
Project involves compulsory purchase of land or property	• Early engagement of landowners • Ensure transparency of progress
Preferred option impacts upon natural or historic environment	• Early engagement with Environment Agency, Natural England and Historic England. • Ensure transparency of option generation • Ensure options are driven by understanding of impacts • Consider mitigation early
Pressure for additional consultation or face to face meetings	• Manage expectations and use dedicated website to distribute information
Risk of unsupportive coverage in the media and press	• Proactively brief the media ahead of key events • Plan a series of positive press releases

8. Stakeholders

8.1. MetroWest Phase 2 will directly or indirectly affect a wide range of individuals, groups and organisations. It is important, therefore, to seek to identify as many relevant stakeholders as possible and engage with them.

8.2. Successful delivery of the project will be influenced by:

- informing stakeholders of the proposals

- obtaining their comments and inputs into the development process and decision-making

- generating support and addressing concerns

- keeping them informed of progress and outcomes

8.3. Effective engagement enables stakeholders to raise concerns and suggest suitable mitigation measures for disproportionately affected groups. Where appropriate, these concerns can be considered and addressed, whilst maintaining the overall effectiveness of the scheme.

8.4. Stakeholders have been identified and then grouped into eight categories:

Campaign groups	Other organisations / groups
Key businesses / business groups	Politicians and local government
Key demographics	Transport operators / projects
Key service providers	Transport user groups

8.5. Once grouped, stakeholders were classified into their likely engagement roles. Four main roles were decided:

1. *Decision makers* – people or organisations charged with making the final decisions around the project;
2. *Delivery partners* – groups that will play a role in delivering the changes required by the project;
3. *Engagement partners* – groups that can help prepare and disseminate information and engage with residents and other groups; and
4. *Influencers* – groups that will be engaged with either directly, or through engagement partners, whether they support or oppose the proposals will have an influence on the decision makers.

8.6. Appendix 1 contains a full list of Stakeholders. As engagement progresses, new stakeholders may be identified and will be categorised and added to the list as appropriate.

8.7. The stakeholder roles influence the likely frequency of contact required and the most suited engagement methods. Once roles were identified, engagement methods and tools were matched.

9. Tools and Methods

9.1. There will be a significant number of affected and interested stakeholders who will want to be informed about the project. As a result, a range of communication and engagement tools and methods have been identified:

- o Early meetings with key individuals/groups - hold meetings with key stakeholders in different formats as appropriate.

- o Briefings to Members, town and parish councils and other key groups

- o Public and stakeholder consultation – a formal phase of consultation to allow information sharing to, and comment from, a wider audience. This will form part of the planning process.

- o Email correspondence and report sharing

- o Social media- information on the TravelWest website and social media platforms

- o Newsletter and FAQs at programme level to share key facts about the project

- o Public relations and media briefings by SGC Press Office. Updates to be provided at key points in project development.

- o Briefing events - structured invitation-only events held with engagement and delivery partners

- o Drop in sessions- facilities for people to come in, obtain information and ask questions

- o Use of online platforms for surveys used during formal consultation periods

- o Pop up events - public events and stunts to raise awareness

9.2. The Project Team will inform the SGC Press Office of approaching key milestones. Internal communications will be used to inform staff so they can endeavour to become ambassadors for the scheme, through the use of intranet articles, Snapshot newsletter, and CEO briefings.

9.3. The SGC Press Office will inform/reassure public and transport community through media work when key milestones are achieved ie through press releases, and TraveWest website.

9.4. Affected Ward Members and PTSE Committee Members will be notified by the Project Team of any key milestones and when any press releases are issued to the media.

9.5. The Project Team will be responsible for agreeing material with partners prior to publication.

9.6. Whilst this list is extensive and covers the most likely engagement tools and methods, it should not be taken as being fixed or complete.

10.   Timeline

10.1. MetroWest Phase 2 has four key programme stages leading to the start of services in 2021:

1. Feasibility (inc GRIP 1-2) to July 2015;

2. Option Development (inc GRIP 3) to 2018;

3. Planning and Procurement (including GRIP 4-5) to 2020;

4. Construction and Operation (inc GRIP 6-8) to 2021.

10.2. The Engagement Plan also follows four phases, designed to link in with the above. This will ensure that technical information is available for consultation and engagement activities and that results from these activities can feed into and inform the technical work.

10.3. Phase 1 – Feasibility - this stage of the study will move through project initiation and towards confirmation of the need for intervention and the scheme objectives. During this phase of the project the focus of communications and engagement work will be on:

- Sharing 'good news' information to confirm that the project has started.

- Sharing information on the purpose and scope of the project and managing expectations around the outcome of this stage of work.

- Making initial contact with stakeholders and setting out/agreeing how we intend to work with them going forward.

- Ensuring that the project team understand the point of view of each of the key stakeholders.

- Generating discussion around the draft objectives and working towards preparation of a set of objectives that has reasonable buy-in from the key stakeholders.

- Providing an opportunity for stakeholders to identify additional evidence to help build the case for intervention

10.4. Phase 2 – Option Development - this stage of the study will focus on option development and the engagement work will:

- Allow stakeholders to contribute to the process of option identification.

- Ensure that the option sifting process and any assumptions made are understood.

- Ensure that stakeholders understand why options perform in the way that they do, relative to the sifting/appraisal criteria.

- Ensure that the reasons for discounting options are clearly communicated.

- Work towards a position where stakeholders understand and support the short listed options identified.

10.5.   Phase 3 - Planning and Procurement.

- To fully inform stakeholders of what the scheme entails

- To give stakeholders the opportunity to comment on the planning applications

- To advise on timescales for delivery / scheme opening

10.7   Phase 4 - Construction and Operation

- To keep stakeholders informed of the construction process and timescales for scheme opening
- To update on road works in relation to the project that might affect highway users
- To update on any railway works as a result of the project that might affect rail passengers
- To promote the new railway service and station facilities
- To offer incentives to use the service
- To update on the success of service

11.   Action Plan

11.1. The Action Plan sets out the key activities that represent the communication and engagement the Project Team will carry out in order to achieve the objectives in this plan. It is envisioned that Network Rail will provide the structure and technical content of communications activities, whilst SGC would refine and review the content before publishing. For engagement activities, members of Network Rail, and SGC will attend from the project team.

11.2. The key activities are listed in their respective phases in the table below:

Phase	Key activities	Date
Phase 1 Feasibility	- Set up website and social media Platforms - Publish key facts of the project - Meet with key decision makers, delivery partners and engagement partners.	
Phase 2 Option Development	- Further meetings and workshops with delivery partners - Inform public of the project and opportunity to feed into work	

	- Analyse data received from engagement; - Prepare material for first formal consultation - Hold public consultation events, with engagement partners and key supporting influencers.	
Phase 3 Planning and Procurement	- Media briefings, update website, newsletter - Prepare material for consultation events - Online questionnaire; - Hold public consultation events, - Analyse data received from engagement	Summer 2019 – Winter 2020
Phase 4 Construction and Operation	- Media briefings - Update website - Provide information for rail passengers - MetroWest Newsletter - Prepare promotional material - monitor success of scheme promotion	Winter 2020 – Summer 2022

12.   Appendix 1- List of key stakeholders

Decision Maker
Delivery Partner
Engagement Partner
Influencer

Category	Role
1. Campaign groups	
Environmental Groups	Influencer
2. Key businesses / business groups	
Business West	Influencer
Bristol & Bath Science Park	Influencer
Emerald Park	Influencer
3. Key demographics	
Resident and Community groups	Influencer
4. Key service providers	
Emergency Services	Influencer
5. Other Organisations/groups	
Environment Agency	Decision Maker
Natural England	Decision Maker
Historic England	Decision Maker
Landowners	Influencer
Developers	Influencer
Highways England	Decision Maker
Utilities	Decision Maker
Water & Sewage	Decision Maker
6. Politicians/local Government	
Member of Parliament	Influencer
Parish/Town Councils	Engagement Partner
Bristol City Council	Delivery Partner
Members and Committees	Decision Maker
Local Planning Authority	Decision Maker
Highway Authority	Decision Maker
Bath & North East Somerset Council	Delivery Partner
North Somerset Council	Delivery Partner
Joint Scrutiny	Decision Maker
WECA/ LEPs	Decision Maker
DfT/ SoS/ DEFRA	Decision Maker
Office of Rail and Road (ORR)	Influencer
7. Transport Operators/ projects	
Great Western Railway	Delivery Partner

Network Rail	Delivery Partner	
Train operating companies (existing and potential)	Influencer	
Cross Country Trains	Influencer	
Freightliner	Influencer	
Deutschebahn	Influencer	
DB Cargo	Influencer	
Freight operating companies	Influencer	
Bus operators	Influencer	
Bristol Port Company	Influencer	
Freight Transport Association	Influencer	
Road Haulage Association	Influencer	
First Group	Influencer	
GWML Electrification	Influencer	
Bristol Area Signalling Renewal	Influencer	
Bristol East Junction Renewal	Influencer	
BTM Station Masterplan	Influencer	
Filton Bank 4 Tracking	Influencer	
Bristol Area Plain Line & S&C Renewals	Influencer	
MetroWest Phase 1	Delivery Partner	
Portway Park and ride	Influencer	
8. Transport User groups		
Public transport users and non-users	Influencer	
British Horse Society	Influencer	
Sustrans	Influencer	
Local rail and transport campaign groups	Influencer	