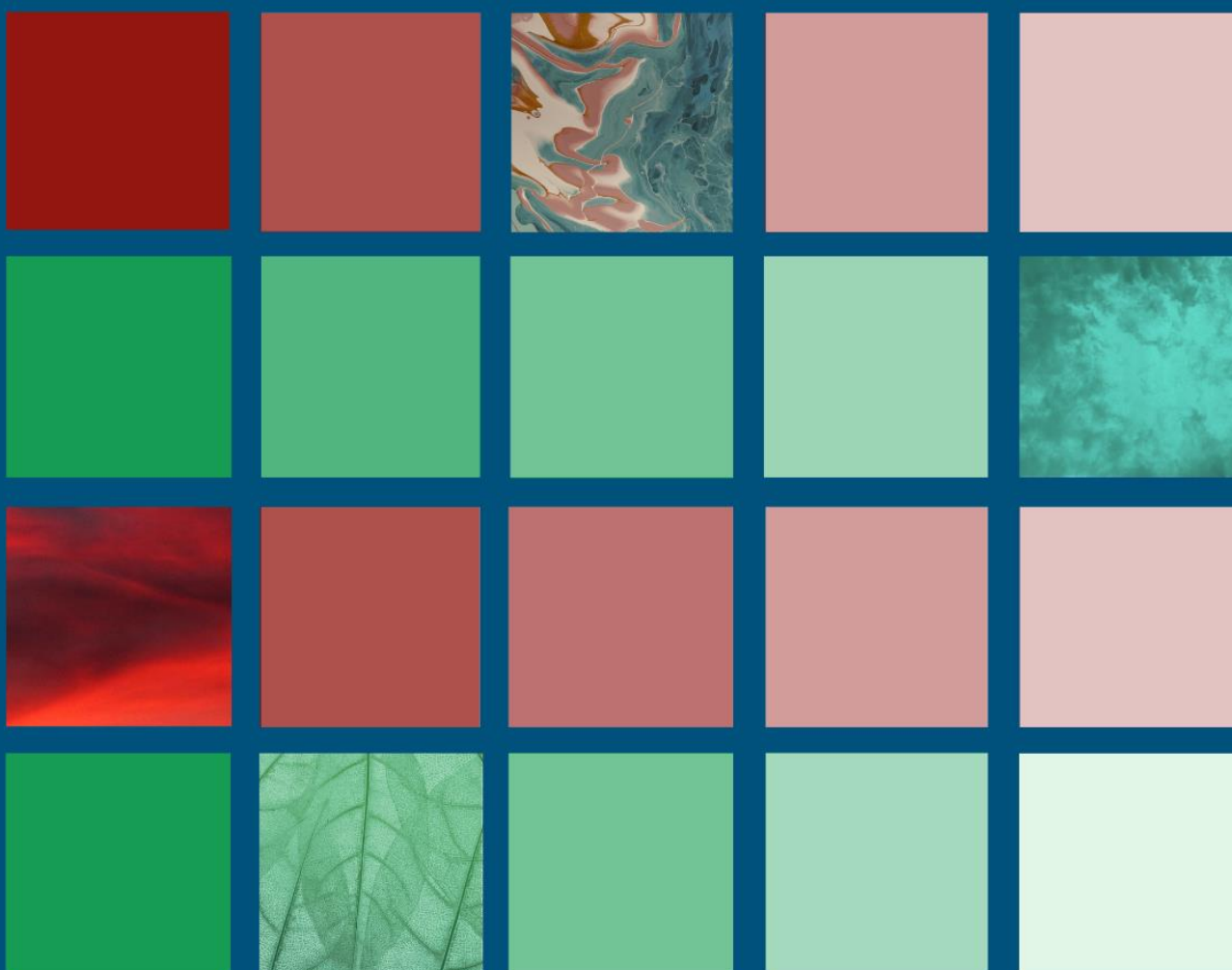


Integrating climate into strategy and planning in universities

Where are we? Where are we going?



Thomas Owen-Smith



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Foreword

One of HESPA's fundamental aims is to support its institutional and individual members to have the skills and expertise needed to navigate their operating environment and achieve their strategic goals.

The HESPA community comprises over 3,000 individuals from over 150 institutions, all playing an increasingly vital role in supporting, running and steering their universities. Given the size and complex nature of higher education institutions, strategic planners add huge value by joining up conversations and multi-function activities, and combining their "big picture" strategic view and technical analytical skills to enable the development and delivery of cross-institution agendas.

Sustainability is one of these. It is increasingly recognised as a horizontal dimension – imperative for every part of a university and its work. Taking a joined-up approach in a context of competing priorities is essential.

Strategy and planning professionals have a unique skillset and the potential to make a substantial contribution to the sustainability agenda, both at their own institutions and collectively at sector level. Many members of our community are keen to engage in this, leveraging their strong relationships with sustainability teams, finance, estates and academic colleagues towards shared goals.

One key challenge is the scale and complexity of sustainability as a topic, which makes critical cross-institution collaboration difficult – particularly as we sometimes lack a common language and clarity around roles and degrees of involvement. There is a perceived need for appropriate upskilling in our strategic planning community, and this has been a catalyst for this work with SUMS Consulting and our developing agenda in this space.

This initial work focuses on climate change and carbon emissions. It helps us to understand the state of play regarding institutional maturity, and how we can learn from each other and other sectors to move this agenda forward. We will continue our work to embed sustainability knowledge in our community, and support collaboration with other groups via our dedicated HESPA Special Interest Group, about which there are more details in the report.

SUMS Consulting is our partner in this shared agenda. As sector organisations, we are both committed to supporting universities and the sector to be key players in our track towards a sustainable future. We are grateful to SUMS for the sharp lens they have brought to this agenda, their ability to connect with our members and to connect our members with new developments. We look forward to collaborating further in this space, which will continue to move quickly.

We hope that HESPA members and others find this report useful, and we very much welcome colleagues to get involved through the Special Interest Group.

Jen Summerton

Executive Director, Higher Education Strategic Planners Association
October 2023

About this report

This report examines the state of the UK higher education sector's practice around **integrating climate change and carbon emissions into university strategy and planning**.

It emerged from conversations with colleagues across functional specialisms (prominently strategy and planning, sustainability, estates and finance) as well as academic leaders across a number of institutions, which suggested a diverse picture of how closely universities have engaged with this topic, and the approaches they are adopting for doing so.

In addition to providing a stocktake of the current landscape, the report aims to promote successful integration of climate and carbon as key strategic drivers through highlighting effective practices already diffusing across the sector, drawing insights from other sectors where new approaches are being tested and adopted more widely, and exploring models used at different institutions for organising their response to the strategic dimensions of the climate challenge. This builds on an existing body of work focusing on various strands of the agenda (see Appendix 1 for further reading).

The report is primarily aimed at **strategy and planning professionals** (also known as **strategic planners**), however we hope the insights here will also prove useful to other professional communities and colleagues working in this area, and aid collaboration between them.

This report is the result of a collaborative cross-sector project between SUMS Consulting and the Higher Education Strategic Planners Association (HESPA). The project was conducted over the first half of 2023, and included the following activities which contributed to the report's content:

- research and engagement with experts inside and outside the higher education sector
- exploration of key questions with the higher education strategy and planning community through a workshop session at HESPA conference in March 2023
- a sector survey disseminated through HESPA's network (full text provided in Appendix 2)
- follow-up conversations with a set of institutions willing to feature as case studies.

The Association of University Directors of Estates (AUDE), British Universities Finance Directors Group (BUFDG) and Alliance for Sustainability Leadership in Education (EAUC) provided helpful insights from the perspectives of the estates, finance and sustainability communities in the UK HE sector. Thanks are due to many people who kindly lent their time to support this work. A full list for acknowledgement and thanks is provided in Appendix 3.

The report's scope is limited to climate and carbon. To ensure clarity of focus within the expansive sustainability terrain, other strands of environmental sustainability such as nature and biodiversity, and questions around social and economic sustainability and governance have been kept out of scope for this piece, despite the many linkages between these and climate issues. We hope that these will be explored further in future work.

As a final point to this introduction, we were encouraged by the fact that survey respondents came from a range of groups in addition to strategic planners, and to discover that planners had collaborated with sustainability colleagues and others to complete the survey in a number of cases. Collaboration is a core principle that we wish to promote through this project; it was heartening to find out how much of it is happening, in a range of forms, as the sector engages with this critical agenda.

Dr Thomas Owen-Smith

Service Lead for Sustainability, SUMS Consulting

October 2023

Executive Summary

The context for universities and strategic planners

As the climate and nature crises deepen, climate change and carbon emissions are to be found amongst the most important strategic drivers for all organisations.

This plays out differently across different sectors. For private companies, climate risks threaten their future profitability and business models and, in a competitive business environment, push them to innovate. For universities, climate risks threaten their future viability and ability to achieve their mission.

Universities' strategic response to climate change must see them reduce their carbon emissions while still creating value and positive impacts through their education and research, all the while navigating an operating environment of growing uncertainty and risk.

The road is daunting and will bring difficult and complex decisions for university leaders, already juggling multiple drivers and constraints.

Much of this agenda speaks to strategic planners' core skillset. By its nature, climate is a complex, whole-institution issue. The coordinating and integrative role of strategic planners puts them in a position to make substantial contributions towards their institutions' transition to net zero carbon emissions and their adaptation and resilience to the changing climate.

Specifically, strategy and planning professionals can contribute through:

- i) supporting development and delivery of **institutional mission around climate**
- ii) helping their institutions **navigate developments in the operating environment**
- iii) enabling the planning and delivery of **technical interventions**
- iv) developing practices which **change the modes of core university business and decision-making** to reduce their climate impacts.

To do this, planners need a shared knowledge base and common language which they can use with the other specialist groups – including sustainability professionals, estates, finance, academic colleagues and others – with whom they must work collaboratively to progress this agenda.

This report is a response to a need identified by the strategy and planning community to develop their knowledge around climate, enabling them to contribute to the agenda most effectively. To this end, the report:

- sets out why climate is a strategic driver for universities
- considers the role that strategy and planning professionals can play in their institution's response, both through their own core skills and collaboration with other groups
- highlights practices which enable the strategic integration of climate in real terms, linking these to the climate action journey and general good practice in strategy and planning
- examines approaches that different institutions have adopted to engage with this agenda, and which are more successful in progressing it.

These points are set in context through an exploration of the current state of practice in the UK higher education sector.

The current state of practice in the UK higher education sector

The report examines the current state of practice around integrating climate into strategy and planning at UK institutions, based on a sector survey of around 50 participants and discussions with experts and practitioners inside and outside the sector. Key insights from the survey are as follows:

- The main impetus for putting climate on the agenda at universities is the views of their leadership and stakeholders. This reflects the values-led ethos of higher education institutions.
- Measures for integrating climate into institution strategy and planning are at variable stages of adoption across the sector. While some are now widely adopted and can be considered standard practice, others are diffusing or emergent, used at only a small number of institutions at present.
- Integration measures map to stages of the climate action journey, meaning that institutions further advanced on their journey are likely to have adopted more of the practices. Most are at a mid-point stage, with an “integration score” of between three and seven practices adopted.
- In institutions’ self-assessment of the effectiveness of their practice around integrating climate as a strategic driver, around half (47.9%) agree or strongly agree their practice is effective, around one third (32.9%) disagree or strongly disagree, with the rest (19.2%) expressing no strong view.
- There is a correlation between institutions’ “self-efficacy scores” based on their self-assessment data and the number of specific measures they have adopted. This, perhaps unsurprisingly, suggests that capability around achieving general good strategy and planning practice (which would apply to any strategic driver) translates into an ability to implement specific practices around climate; but may also indicate confidence resulting from successful implementation of integration measures.
- A wide range of models, roles and responsibilities for leadership around climate is evident across the sector. This is due to the agenda’s relative novelty and the diversity of institutions’ size, overall structures and models for the sustainability and strategic planning functions in particular.
- No specific model has a definitive relationship with higher integration and self-efficacy scores, in terms of which role or function leads the strategic agenda.
- The variable which *does* appear linked to higher scores is collaboration between the planning and sustainability teams, which is a stronger factor for progress than leadership by any specific function.

Where from here?

The report is intended as an initial contribution towards upskilling planners around climate, enabling them to support its strategic integration at their institutions more effectively.

It makes recommendations for integration of climate into strategy and planning through:

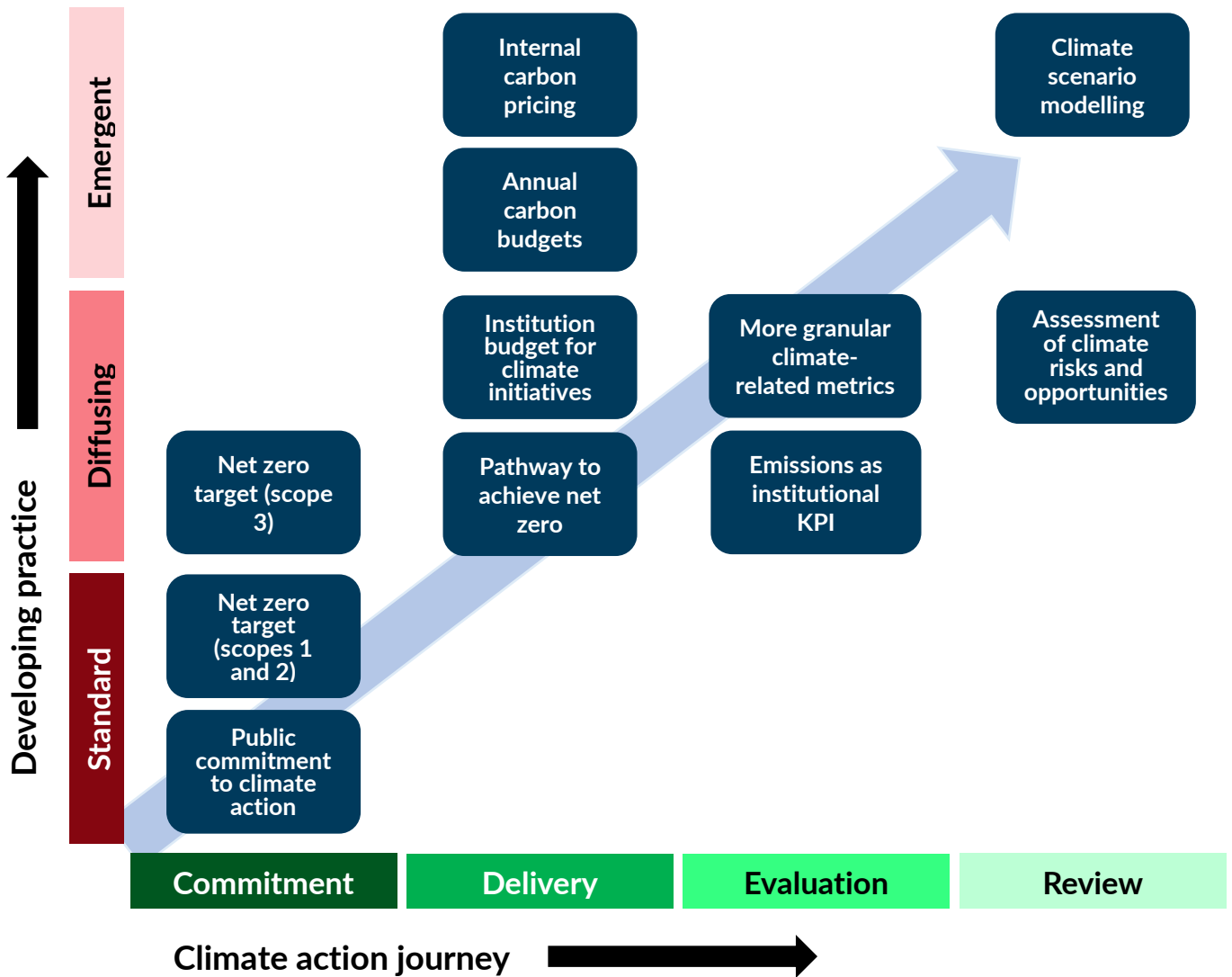
- adopting the measures presented in the report (Part Two)
- using the recommendations of the Task Force on Climate-Related Financial Disclosures (2017) for an overall strategic framework
- deploying existing sector work around specific strands of the agenda
- clarifying roles and responsibilities for leading and coordinating the agenda
- promoting collaboration between professional groups.

This learning and development agenda will be continued through a Special Interest Group run jointly by HESPA and SUMS Consulting, focusing on Sustainability in Strategy and Planning. Further details are provided in the report (Part Three) and more information is available from info@hespa.ac.uk or sums@reading.ac.uk.

Recommendations for integrating climate into strategy and planning

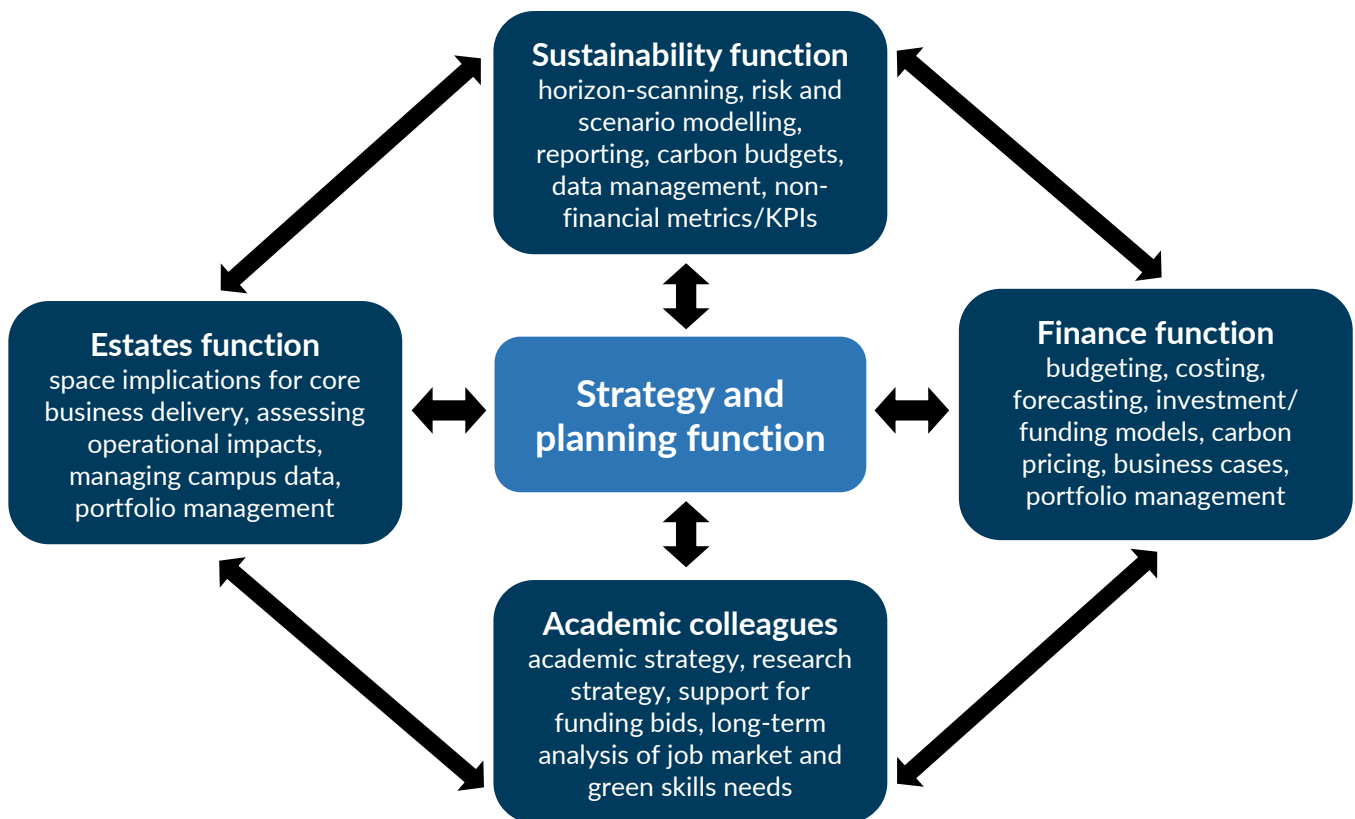
This report recommends that strategic planners and their institutions take the following actions:

1. **For specific measures towards strategic integration**, set in place or reinforce an agenda to adopt the measures explored in Part Two of the report, also set out below.
 - For measures which are currently diffusing or emergent in the higher education sector, this may initially involve experimentation and testing.
 - Adoption of the measures should be considered alongside the institution’s climate action journey, and should reinforce the momentum of the journey through their role in setting a commitment, delivering commitments, evaluating progress and reviewing approach.



2. **For an overall strategic framework**, adopt the recommendations of the Task Force on Climate-Related Financial Disclosures (2017). These provide a rigorous standard for ensuring that climate is appropriately integrated into an organisation’s governance, strategy, risk management, metrics and targets.
3. **For measuring and reporting carbon emissions**, use the *Standardised Carbon Emissions Framework (SCEF) for Further and Higher Education (2023)*, developed by EAUC in consultation with the sector to standardise practice around emissions reporting.

4. **For assessing the outline costs of technical interventions**, use the approach set out in AUDE, BUFDG and EAUC's *The Cost of Net Zero* (2023), which can inform more detailed cost modelling.
5. **For clarity of roles and responsibilities**, if not already defined, establish or confirm which individual or function at the institution is:
 - Responsible for integrating climate-related objectives into institutional strategy
 - Responsible for integrating carbon into overall planning at the institution level
 - Accountable for progress against the institution's net zero targets (it is advisable for this to be a member of the institution's leadership team)
 - The owner of the institution-level budget for climate-related initiatives (establish such a budget if none exists at present)
 - Responsible for compiling carbon data
 - Responsible for publishing carbon data.
6. **For enabling collaboration between professional groups within institutions**, establish formal mechanisms for deploying the specialist expertise and skills of different functions, integrated where possible into existing vehicles such as the annual planning process to ensure a coherent institutional approach.
 - A working model of areas for potential collaboration between the strategy and planning function and other groups is provided here. This is intended to be indicative rather than exhaustive and approaches will of course play out differently in institutions according to their specific context, with other functions also playing important roles.



7. **For supporting upskilling and collaboration across institutions**, colleagues with an interest in this agenda may wish to consider joining HESPA and SUMS Consulting's Special Interest Group focusing on Sustainability in Strategy and Planning. The group is aimed primarily at strategic planners but colleagues from other professional groups are welcome.

Part One

The context for universities and strategic planners



Why climate is a strategic driver for universities

We know that climate change is amongst the greatest and most complex challenges facing humankind.

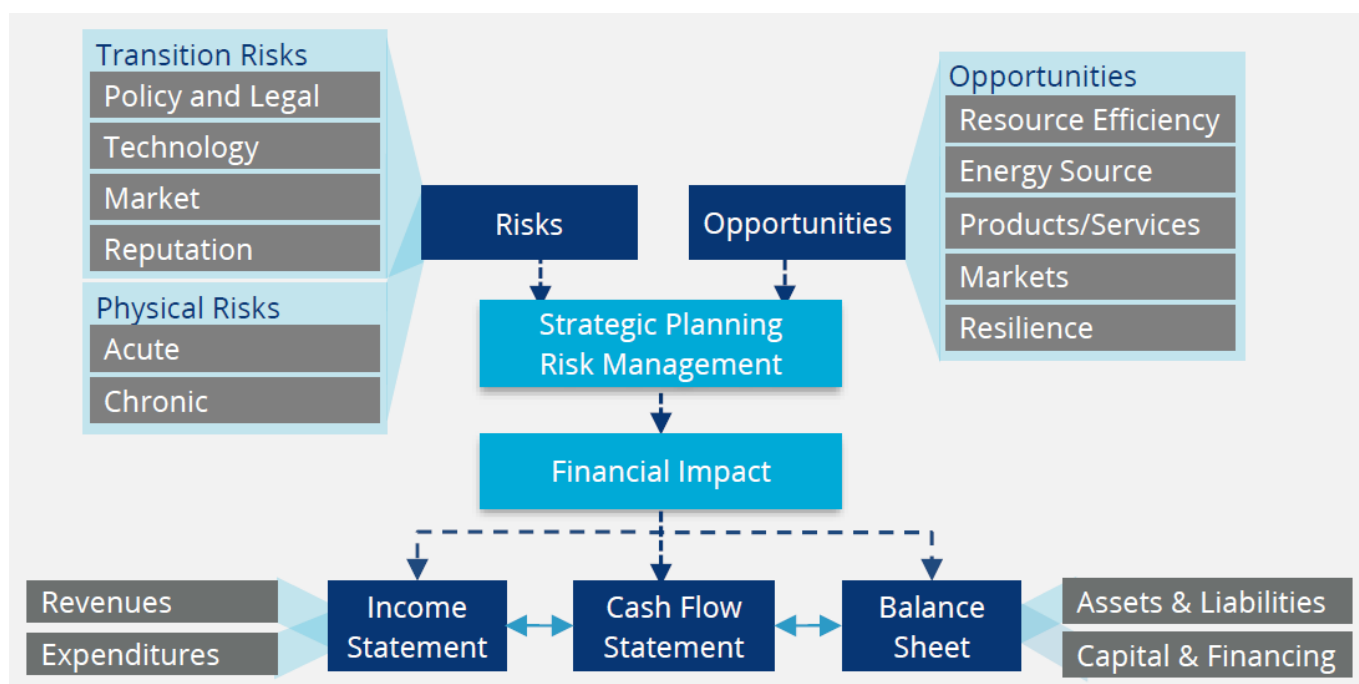
The last decade has seen many universities reduce their carbon emissions, largely through investing¹ in improvements to their estates and energy systems (although the sector's emissions are still the size of a small country²). Many UK institutions are also at the forefront of climate research and green innovation, collaborating with practitioners and business to deploy new technologies, and have begun to embed climate education into their curricula.

With these developments, **technical** and **mission-related** dimensions of responding to climate change can be considered largely on the map for the UK higher education sector.

Medium to long-term **navigational** questions around what the changing climate might mean for universities and their ability to operate are also on the radar to some extent, at some institutions.

Many universities now include climate-related risks on their risk register, with physical risks such as heat, flooding and their potential impacts on business continuity often prominent. Less explored to date have been the risks associated with the global transition to a sustainable, low-carbon economy – which will manifest across areas such as regulation and policy, emergence and obsolescence of technologies, market dynamics, reputational risks and the associated “license to operate”.

Figure 1: Climate-related risks, opportunities and financial impacts for companies and financial institutions



Extracted from Recommendations of the Task Force on Climate-Related Financial Disclosures (2017)

The Task Force on Climate-Related Financial Disclosures (TCFD) recommends that companies and financial institutions undertake regular assessment and disclosure of both *physical* and *transition risks* and their potential impacts on strategy and financial performance. The purpose of climate disclosures in the

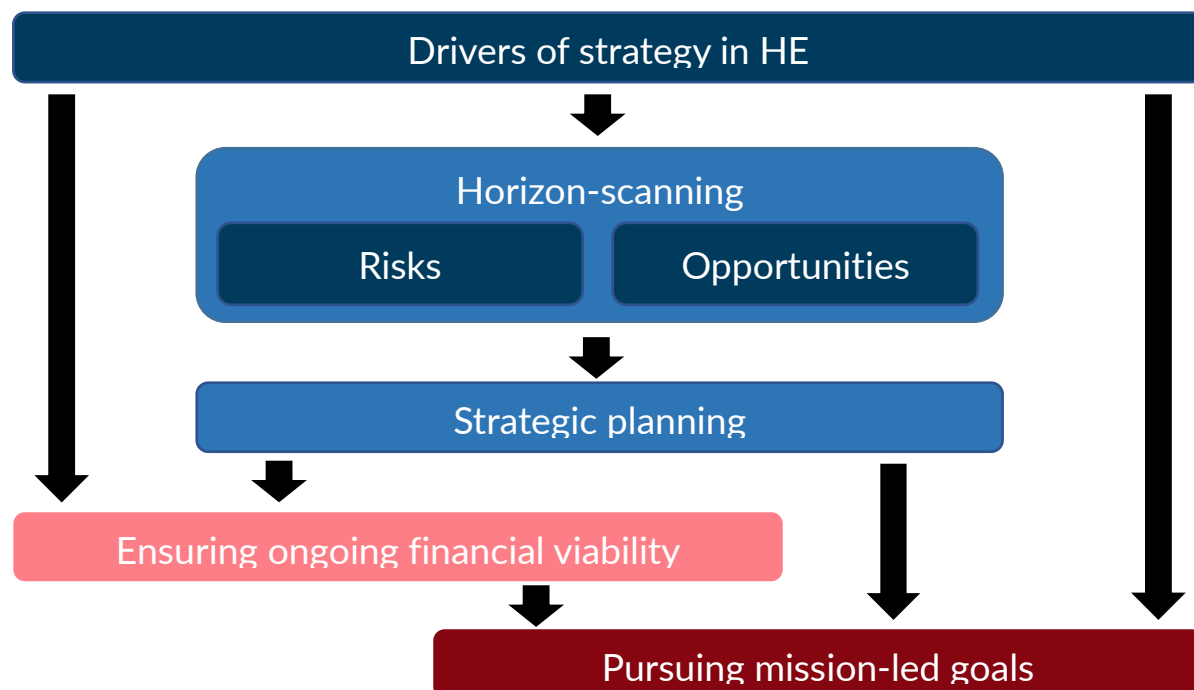
¹ AUDE, BUFDG and EAUC's *The Cost of Net Zero* report (2023) provides useful guidance and a calculator for estimating costs of technical interventions around reducing carbon.

² See The Royal Anniversary Trust's report *Accelerating to Net Zero* (2023) for an estimate of the total carbon emissions of the UK's higher and further education sectors.

private sector is to inform the revaluation of assets, effectively “pricing the transition” into the financial system. From 2023 they are part of UK statutory reporting³ for large companies (above 500 employees).

Most universities in the UK, being charitable rather than profit-making organisations, do not have market valuations and their strategies tend to place mission and the impacts they wish to achieve first and foremost, with money as an enabler rather than end goal.

Figure 2: Drivers of strategy for higher education institutions



Transition risks are perhaps less keenly felt here than in the private sector where the competitive drivers are stronger. However they are material for universities too – particularly over longer time horizons, which will see them exert substantial impact on universities’ financial position and ability to operate.

Universities have tended to approach climate action and rapid decarbonisation from the perspective of “doing the right thing”. This is the right thing of course. But for a higher education institution, it is also a case of shoring up your own future resilience (already fragile at some HEIs) and hence, ability to achieve your mission. This could also be seen in terms of the need to plan for adaptation, as well as mitigating climate change. As the UK and European Union (both of which aim to be net zero economies by 2050) continue to advance regulations around carbon and climate for large organisations, it is also likely that regulatory expectations on education institutions will increase in the coming years.

Of course, transition and adaptation will also bring opportunities for universities to create new value and positive impacts through their research and education. The challenge will be working out how to do this, and more broadly to operate as a large organisation, without negative impacts on the climate and natural environment. This proposition will require institutions to go beyond technical interventions to make quite fundamental **changes to modes of core business and decision-making**⁴. Enabling these kinds of changes is another key strand of this agenda.

This report explores what all this means for universities, and particularly for their strategy and planning functions, in practice.

³Companies (Strategic Report) (Climate-related Financial Disclosure) Regulations 2022.

⁴ See for example Universities UK’s (2022) report *How the climate crisis affects internationalisation: Report of a survey into internationalisation and climate action* for a discussion of some of the challenges.

The role of strategic planners

Strategy and planning functions in UK universities hold a broad set of remits which drive strategy development and implementation across an institution's work.

Key elements of the brief include incorporating internal and external drivers in a holistic way, managing competing priorities and balancing the needs of multiple stakeholders. Importantly, strategic planning is not the function which owns every element of an institution's strategy and plans, many of which are the remit of other specialist functions. Rather, the strategic planning function's role is to *integrate these elements for a holistic institution-wide approach*.

By its nature, climate is a complex, whole-institution issue: exactly the kind that strategic planners grapple with on a regular basis. The coordinating and integrative role of strategic planners offers opportunities for them to make valuable contributions towards:

- i) supporting development and delivery of **institutional mission around climate**
- ii) helping their institutions **navigate developments in the operating environment**
- iii) enabling the planning and delivery of **technical interventions**
- iv) developing practices which **change the modes of core university business and decision-making** to reduce their climate impacts.

Recent research⁵ on green skills (those skills needed in the workforce to support the transition to a sustainable economy) notes both an expansion of the skillset and scope of existing specialist sustainability roles and an increased need for green skills in roles without a specialist focus on sustainability. These developments reflect the growing prominence of sustainability as a core business driver for all organisations, and an increasing need – underlined by data in this report – for *collaboration between professional groups bringing distinct skillsets and specialist expertise towards achieving sustainability goals*.

Table 1: Use of strategic planners' skillsets for integrating climate into university strategy and planning

Relevant skills of strategic planners and potential areas for their deployment for strategic integration of climate and carbon	Key dimensions of climate in university strategy and planning			
	Mission	Navigation	Enabling technical interventions	Changes to core business
Horizon-scanning	•	•		
Foresight, modelling and scenario planning	•	•		•
Regulatory and policy knowledge	•	•		
Risk management		•		
Corporate strategy development	•	•		•
Developing, coordinating and aggregating plans across the institution	•		•	•
Linking disparate strands and balancing trade-offs	•	•	•	•
Distilling key decisions for institution leadership	•	•	•	•
Programme/project management and governance			•	•
Developing and tracking metrics and KPIs	•		•	•
Data analysis		•		•
Data management and governance		•	•	•

⁵ Deloitte. 2022. *A blueprint for green workforce transformation*.

To this end, the ability to operate with a common language and shared knowledge base is essential. For strategic planners, this means integrating sustainability knowledge to their skill set to aid collaboration with sustainability specialists and other professional groups around this rapidly developing area.

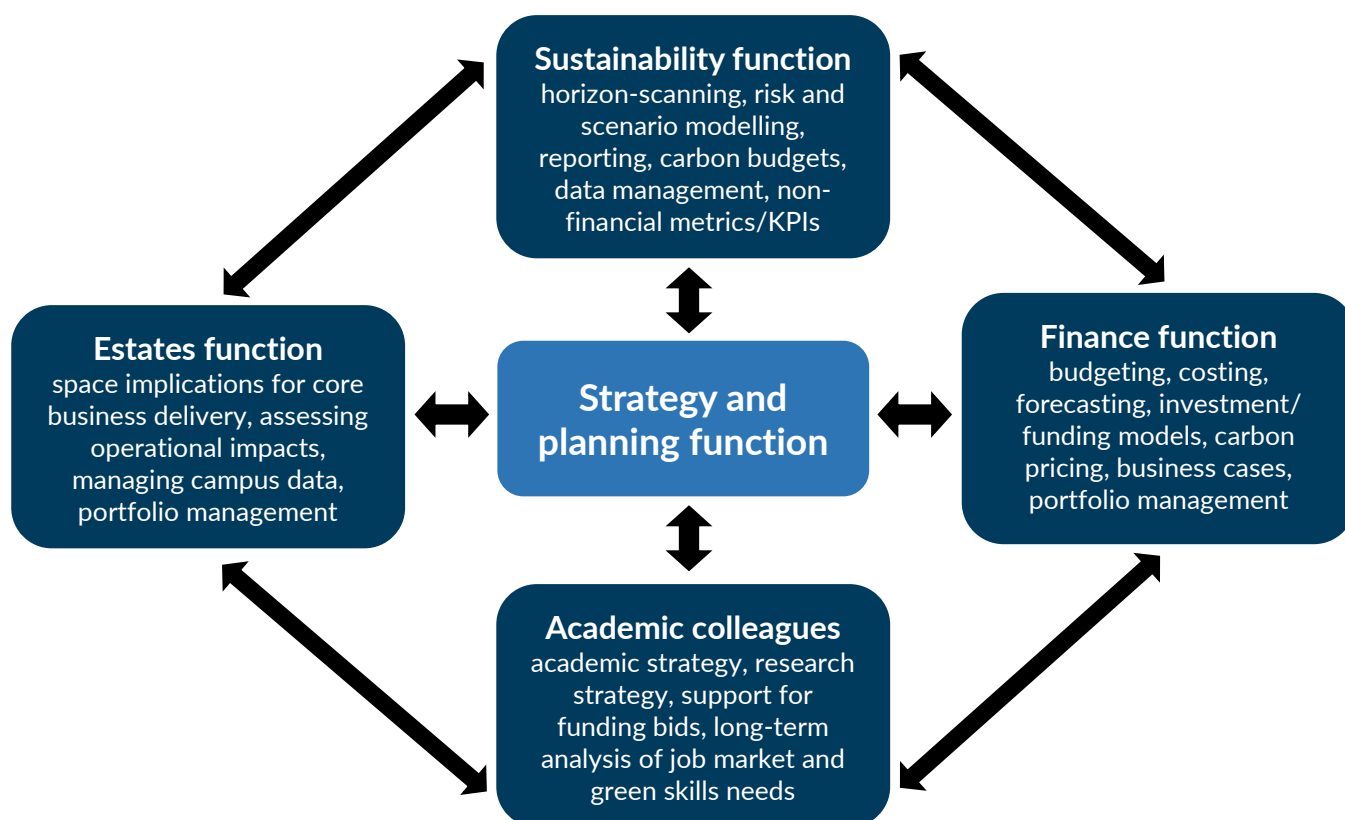
A workshop at the 2023 HESPA Conference explored areas where strategic planners' core skillsets can contribute to their institution's climate agenda. Key points from this discussion are mapped in table 1 against their potential for deployment to support the key dimensions noted above. The workshop also discussed how collaboration around the climate agenda could be optimised, and surfaced the following enablers: information flow; clear governance structures; cross-departmental, cross-functional working groups; institutional leads with view across the whole picture; clarity around policies and standards for complex questions; and working with external and internal partners.

The varied models that institutions are adopting to approach the climate agenda are explored in more detail in Part Two. They demonstrate that many institutions are already taking highly collaborative approaches, and that collaboration between functions appears to be a more significant factor for making progress on the climate agenda than leadership by any specific function.

This report develops a working model suggesting areas where the strategy and planning function may collaborate with other groups around particular activities in the agenda (figure 3). This is intended to be indicative rather than exhaustive and approaches will of course play out differently in institutions according to their specific context, with other functions also playing important roles. Planners might take a coordinating, supporting or even a leading role depending on the task in hand, and the other groups featured (as well as others) are also likely to collaborate with each other directly around various topics.

Developing formal touching points through processes such as the annual planning cycle is an effective means of ensuring that appropriate expertise on the relevant topics is brought to bear. Strategic planners, who design and run the planning process at many institutions, have a key role in making that happen.

Figure 3: Areas for potential collaboration between strategy and planning function and other groups



Part Two

The current state of practice in the UK higher education sector

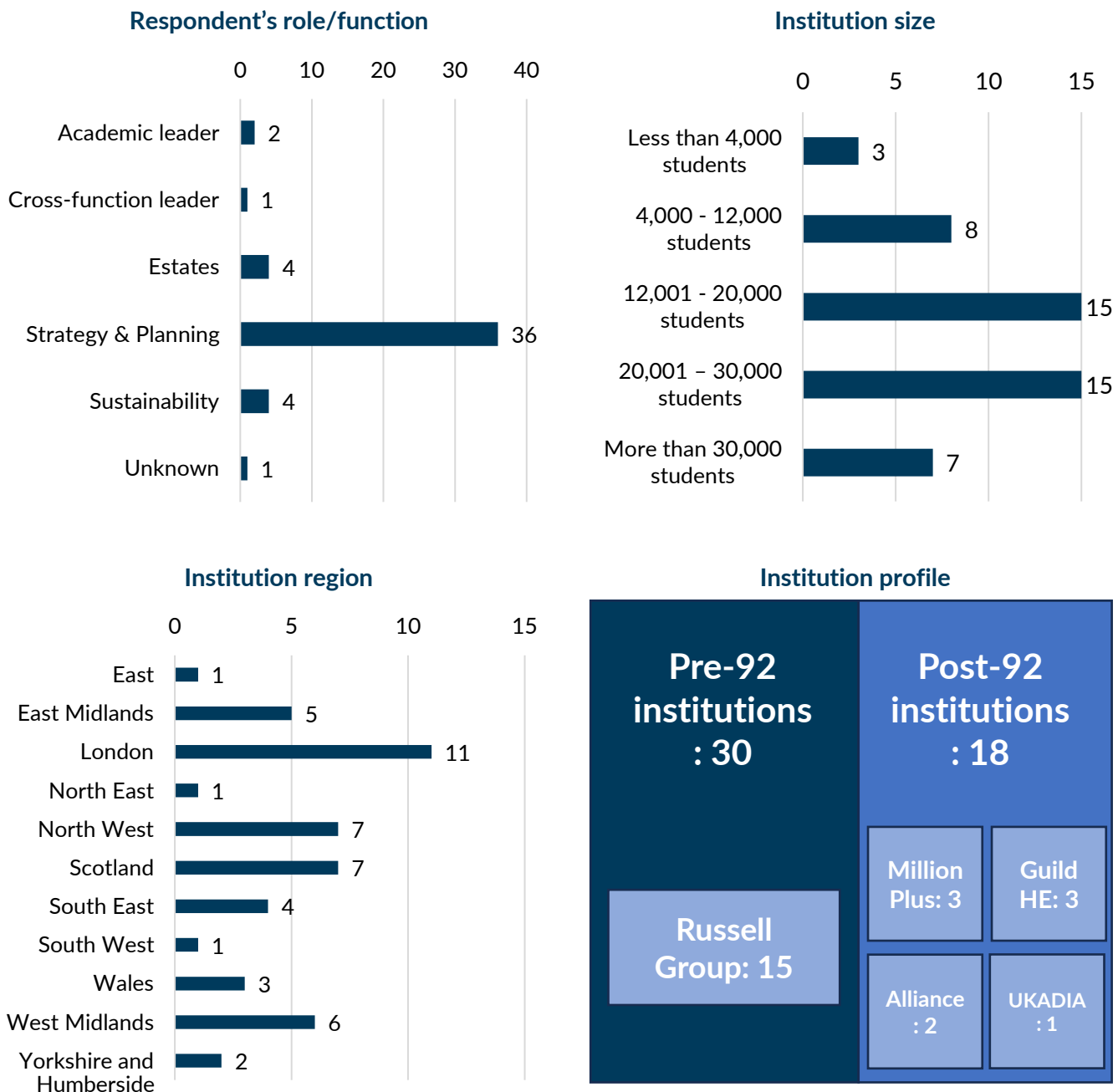


Sources of data and insights

The main source of data for this analysis was a sector survey⁶ disseminated through HESPA’s network in May 2023. This was supplemented by richer discussions with survey respondents who were willing to share their approaches for case studies.

An overview of the shape of survey respondents and their institutions is provided here. The 48 institutions represent a good cross-section of the UK sector, with representation from across the UK’s regions and nations, as well as different sizes and mission groups. The bulk of survey respondents were strategic planners, however responses were also received from other groups, and a number of responses were joint submissions with more than one function having contributed.

Figure 4: Data on survey respondents and institutions



⁶ The full survey text is provided in Appendix 2.

Impetus for putting climate on institutions' agendas

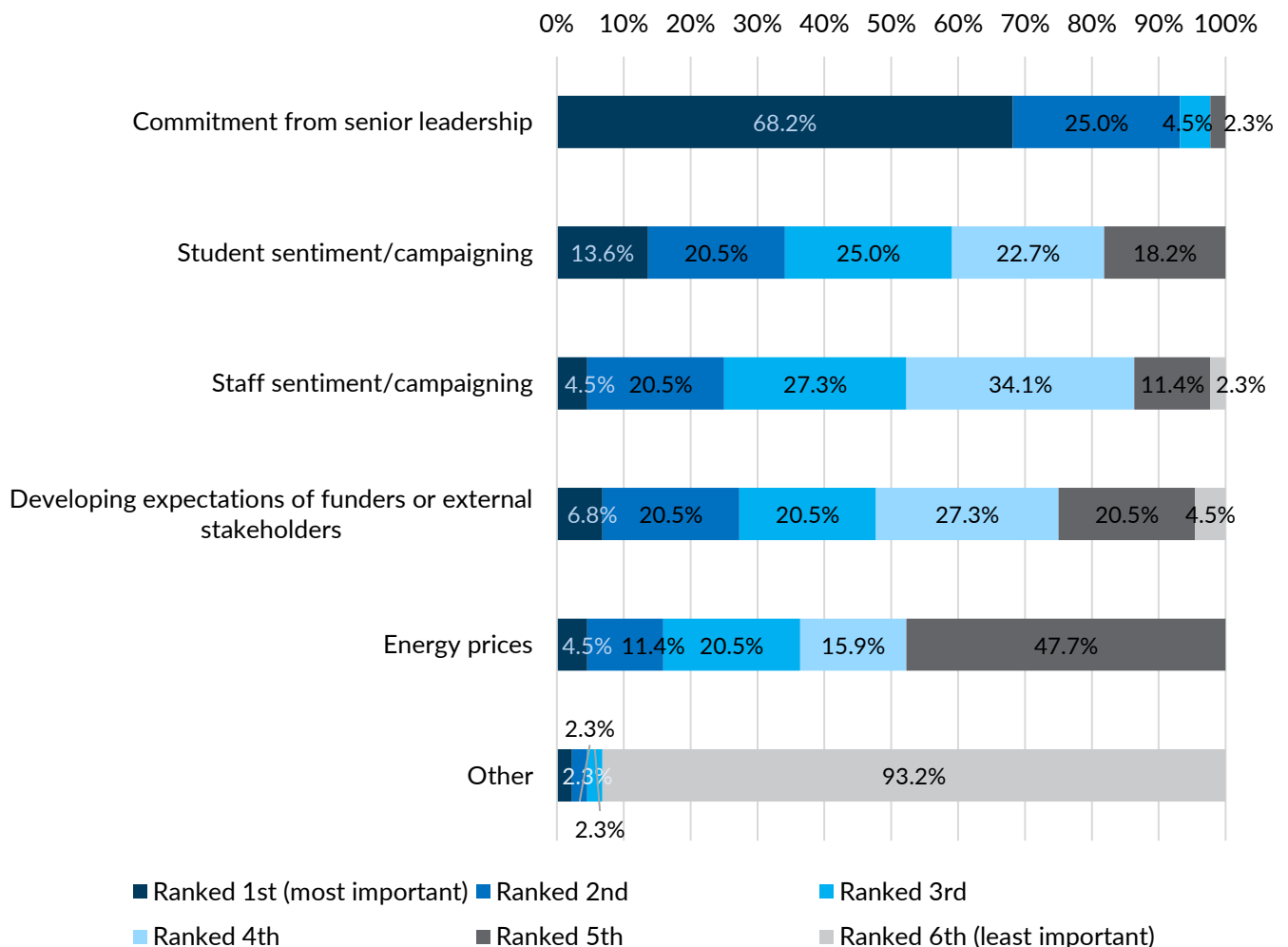
Survey respondents were asked to rank the importance of different drivers in building impetus for the climate agenda at their institution. Six options were provided: commitment from senior leadership, student sentiment/campaigning, staff sentiment/campaigning, developing expectations of funders or external stakeholders, energy prices and "other" as a catch-all for any potential drivers not listed. Responses are shown in figure 5 (rounded to one decimal place).

The survey responses show that the views of institutions' leadership and stakeholders are by far the most important drivers, with the strongest stakeholder influence coming from students, followed by staff and external stakeholders. Commitment from senior leadership is ranked most highly of all (more than 90% of respondents ranked it first or second), although the data does not indicate whether senior leadership commitment followed stakeholder sentiment or anticipated it.

Energy prices, which rose substantially in 2022, feature on the radar but with a lower importance; and few institutions (less than 10%) assigned high importance to any other drivers.

These responses reflect universities' mission-led ethos and their accountability to their stakeholders. They may also indicate that the long-term risks to institutions' ability to do business (which might have surfaced in the "Other" category) have not been prominently on the radar for universities – a difference between HE and sectors such as finance and manufacturing where risk-led drivers are more salient.

Figure 5: Respondents' ranking of drivers of the climate agenda at their institution



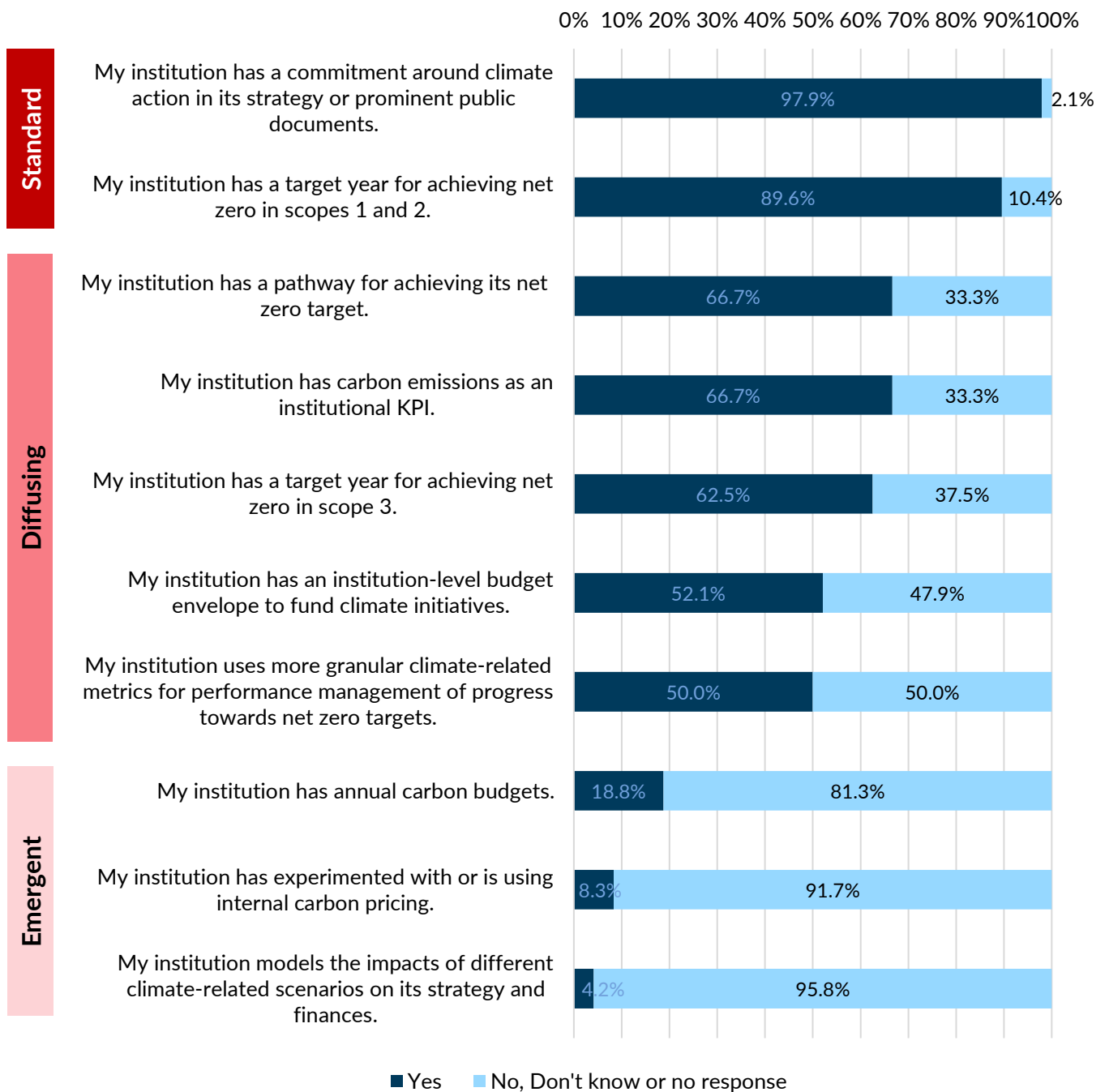
Practices integrating climate into strategy and planning

Survey respondents were next asked to respond “yes”, “no” or “don’t know” as to whether their institution has adopted ten measures towards integrating carbon and climate into its strategy and planning. Their responses are shown in figure 6 (rounded to one decimal place).

The measures fall into three groupings according to their current degree of adoption across the sector:

- Practices which are now **standard** in UK universities (>85% adoption)
- Practices which are **diffusing** across UK universities (~50-70% adoption)
- **Emergent** practices in UK universities (<20% adoption)

Figure 6: Sector adoption of measures for integrating climate into strategy and planning



Many of the measures which are currently diffusing and emergent in the HE sector are more prevalent in the private sector.

In some cases, this is due to regulation. As discussed in Part One, climate disclosures are now mandatory in the UK for companies with more than 500 staff, which are required to report not only on their approach to assessing and managing climate risks and opportunities, but also how their business model and strategy are affected, the associated targets and plans, the metrics they use to assess progress, and their assessment of the resilience of their business in different climate scenarios.

Some sectors (energy, heavy industry and aviation) have been subject to carbon pricing regulations for many years (through the European Union Emissions Trading System and subsequently its replacement, the UK Emissions Trading Scheme). Internal carbon pricing as a management tool is most common in these sectors, but it is also widely used in other sectors. In a 2020 global survey⁷ of 5,900 companies, 52.4% of financial services respondents, 35.5% of retail respondents and 27.3% of services respondents reported that they were already using or planning to use internal carbon pricing; and a total of 39.3% of respondents across all sectors in Europe.

Although the differing strategic drivers for private sector organisations and universities may encourage the adoption of different approaches, integration measures are generally applicable across both.

This report recommends that universities set in place or reinforce an agenda to adopt these measures.

Definitions of key terms	
Budget envelope	<p>A sum or line in an organisation’s (financial) budget which is ringfenced for specific activities, the details of which may or may not already be determined.</p> <p>In the climate agenda, activities ringfenced for funding through discrete budget envelopes may include technical interventions such as improvements to estates/infrastructure, mission-related initiatives such as new research programmes or centres, or other business change initiatives to further the agenda.</p> <p>A designated budget envelope can be managed through a formal portfolio model to ensure smooth delivery and that maximal benefits are achieved from the funds.</p>
Carbon budget	<p>The maximum amount of carbon emissions that can be created while still adhering to a <i>pathway</i> for emissions reduction.</p> <p>Carbon budgets can be set at the organisation level, or for the units or geographies of an organisation where they can be used as a management tool, provided that high-quality and granular emissions data is available. They are independent from financial budgets, although it is possible to reflect carbon in financial budgets through using a <i>carbon price</i>.</p>
Climate-related risks	<p>The range of risks related to climate.</p> <p>They fall into two main categories: physical risks and transition risks (see Part One).</p>
Climate-related scenarios	<p>Scenarios modelling how various combinations of climate risks and future developments may affect an organisation.</p> <p>They may be exploratory or normative. Exploratory scenarios explore plausible future states, while normative scenarios are used to back-cast planning from a preferred future. The former are typically used to identify problems and develop high-level strategy; the latter to test and refine targets and <i>pathways</i> for emissions reduction.</p>

⁷ Carbon Disclosure Project. 2021. *Putting a price on carbon: The state of internal carbon pricing by corporates globally*.

Internal carbon pricing	<p>A price applied inside an organisation to reflect the costs of carbon emissions in decision-making, financial planning and/or operations.</p> <p>It can take the form of a shadow price (used, for example, for assessing business cases or modelling cost scenarios for offsetting residual emissions for the most difficult areas) or a fee paid internally, creating an incentive for the relevant unit to reduce its carbon emissions (for example, from business travel).</p> <p>While carbon pricing is intended to make the costs of carbon real, it is worth noting that few if any organisations (or national regulatory frameworks) currently use a carbon price high enough to truly reflect the estimated costs associated with carbon emissions' long-term impacts on the environment, society and the economy.</p>
Net zero	<p>A state where greenhouse gas/carbon emissions have been reduced as far as possible and any residual emissions are balanced by like-for-like removals of carbon from the atmosphere (commonly referred to as "offsetting").</p>
Pathway	<p>The approach (also referred to as "transition plan") by which an organisation intends to meet its net zero targets⁸. A strong pathway typically includes:</p> <ul style="list-style-type: none"> i) specific steps/initiatives the organisation intends to take (these are likely to include both technical interventions and changes to modes of business) ii) estimates/targets for the contribution the initiatives will make towards reducing the emissions footprint iii) phasing of the planned initiatives iv) mid-point or year-on-year targets for emissions specifying the trajectory for reduction. If these targets are made mandatory, they effectively constitute a <i>carbon budget</i>. <p>It should also include a position on offsetting of residual emissions (those which are the most difficult to abate with available technologies).</p>
Scope 1	<p>Direct emissions that occur from sources owned or controlled by the organisation, for example emissions from using fossil fuels for heating buildings or powering vehicles.</p>
Scope 2	<p>Emissions from the generation of purchased electricity or heat consumed by the organisation. Although these emissions are indirect, scope 2 emissions are often grouped with scope 1 as organisations have a relatively high degree of control over them by reducing their own energy usage.</p>
Scope 3	<p>All other indirect emissions that occur as a result of an organisation's activities but are not included in scope 2. These are generally associated with the organisation's upstream and downstream value chains, and include a number of strands which may be easy or more difficult to influence.</p>

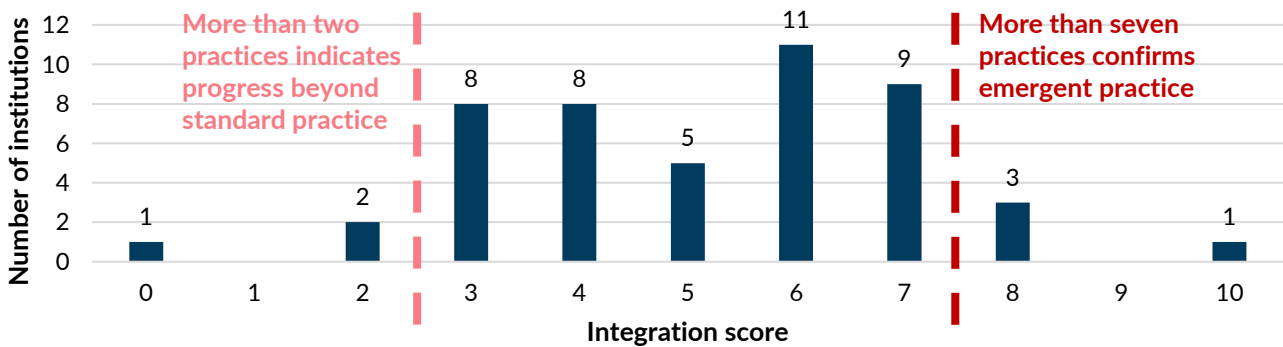
⁸ The Transition Plan Taskforce's *TPT Disclosure Framework* (2023) provides further guidance around what constitutes a comprehensive pathway/transition plan.

Integration and the climate action journey

The majority of institutions have adopted between three and seven of the surveyed measures for integrating climate into their strategy and planning, indicating that most universities are now moving beyond the standard practices of making a net zero commitment and setting a target year for net zero in scopes 1 and 2, and are starting to experiment with and adopt more advanced practices which are now diffusing across the sector.

Few institutions have so far adopted more than seven practices (which would indicate for certain that they have adopted at least one of the three emergent practices). We refer to the count of integration measures adopted at each institution as the institution’s “integration score”.

Figure 7: Institutions’ integration scores for the number of integration measures adopted



The ten integration measures are situated at different stages of the climate action journey which starts with a statement of **commitment**, followed by **delivery** of commitments, **evaluation** of progress and periodic **review** of approach (after which the cycle begins again with a fresh statement or restatement of commitment).

Figure 8: The climate action journey



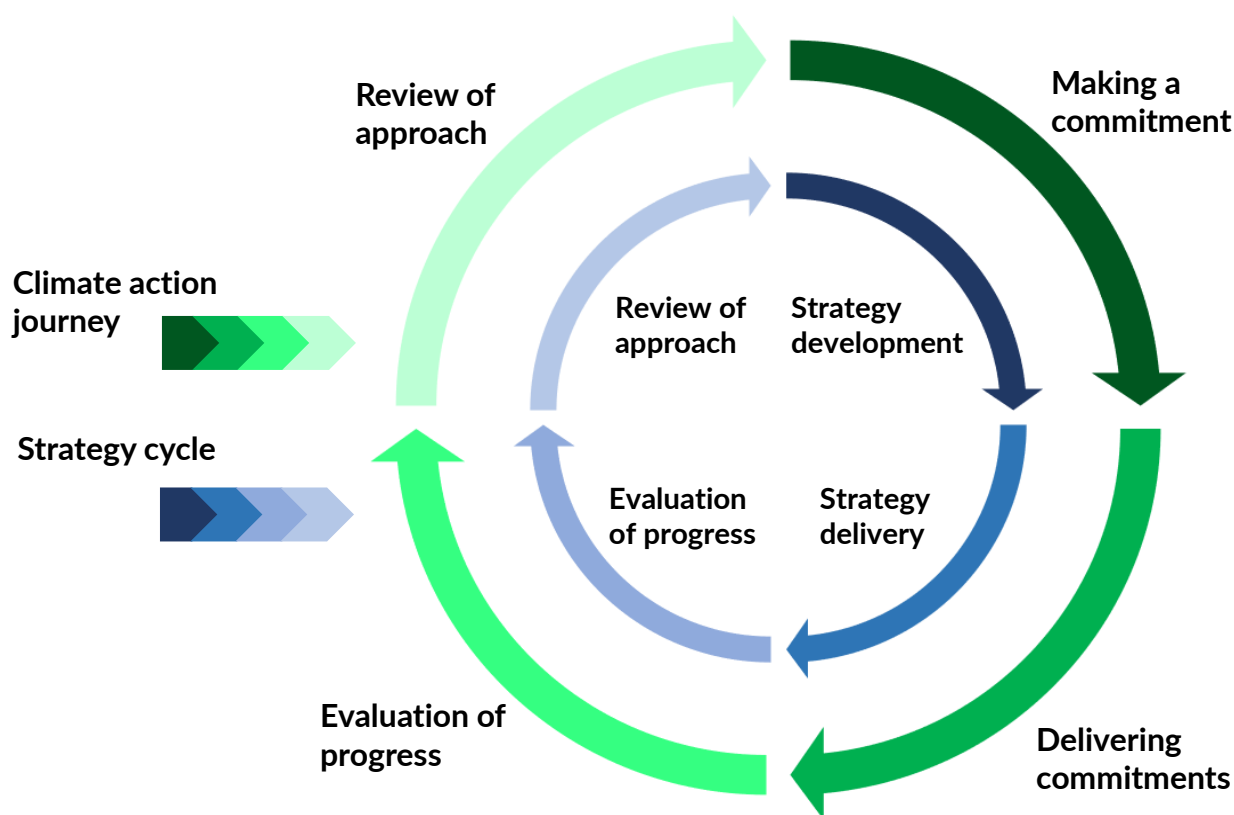
Nottingham Trent University has taken steps to integrate carbon into its institutional strategy through prominence as a strategic theme and streamlined channels for overseeing progress towards a target for net zero across all scopes by 2040. *Embracing sustainability* is one of six overall aims of the university’s strategy, and net zero carbon is a key strand of this. Each of the strategy’s aims has an owner on the university executive, who is accountable to the executive for delivery of the associated objectives and KPIs, and chairs a small oversight group comprising the leaders of the key strands under that aim. This model means that reporting lines and accountability for progress are clear (with carbon emissions flagged as an institutional KPI); and integrates risk management to strategy delivery, with each strategy theme having its own risk register which is scrutinised by a risk management committee and reported to the board of governors twice a year. Its inclusion as a high-level theme therefore ensures that climate is given due prominence in institutional strategy and risk management. Responsibilities and targets are devolved down to the university’s academic schools and other units, with a high degree of autonomy around delivery, and progress evaluated with live data across units and emissions sources.

Commitment⁹ as the starting point of this process chimes with the data around the impetus for the agenda at universities: by and large, they have been led by their and their stakeholders' values around doing the right thing, and proceeded to develop approaches towards delivering their commitments.

This journey broadly maps to the standard strategy cycle (**development > delivery > evaluation > review**), although experience across the sector suggests that the first stage of the typical climate action journey (**commitment**) may involve a stronger degree of *intent* and somewhat less of the analysis of the external environment and internal conditions that would typically be a part of strategy development. (In consequence, some institutions are finding that when they come to review their approach for climate action developed several years ago, their original targets were extremely stretching.)

At the **University of St Andrews**, the strategic planning team has been collaborating with the sustainability and estates functions to achieve major improvements in the quality of carbon and sustainability data. Elements include data collection (with smart technologies where possible), management and governance, and applying quality assurance models used for statutory and other key datasets. The strategic planning team oversees performance against institutional KPIs, drawing on the expertise of sustainability colleagues to ensure that targets around carbon align with Science-Based Targets initiative guidance. This work has improved both the quality of data and the availability for reporting and evaluation of progress. There is further collaboration around the university risk register, which is managed by the strategic planning team drawing on knowledge from sustainability and estates, and around planning and budgeting for the *Sustainable* theme which sits at the top level of the university's strategy. Budgets have been rearranged around the strategy themes rather than territorial units, to focus momentum for achieving the strategy goals.

Figure 9: The climate action journey and the strategy cycle

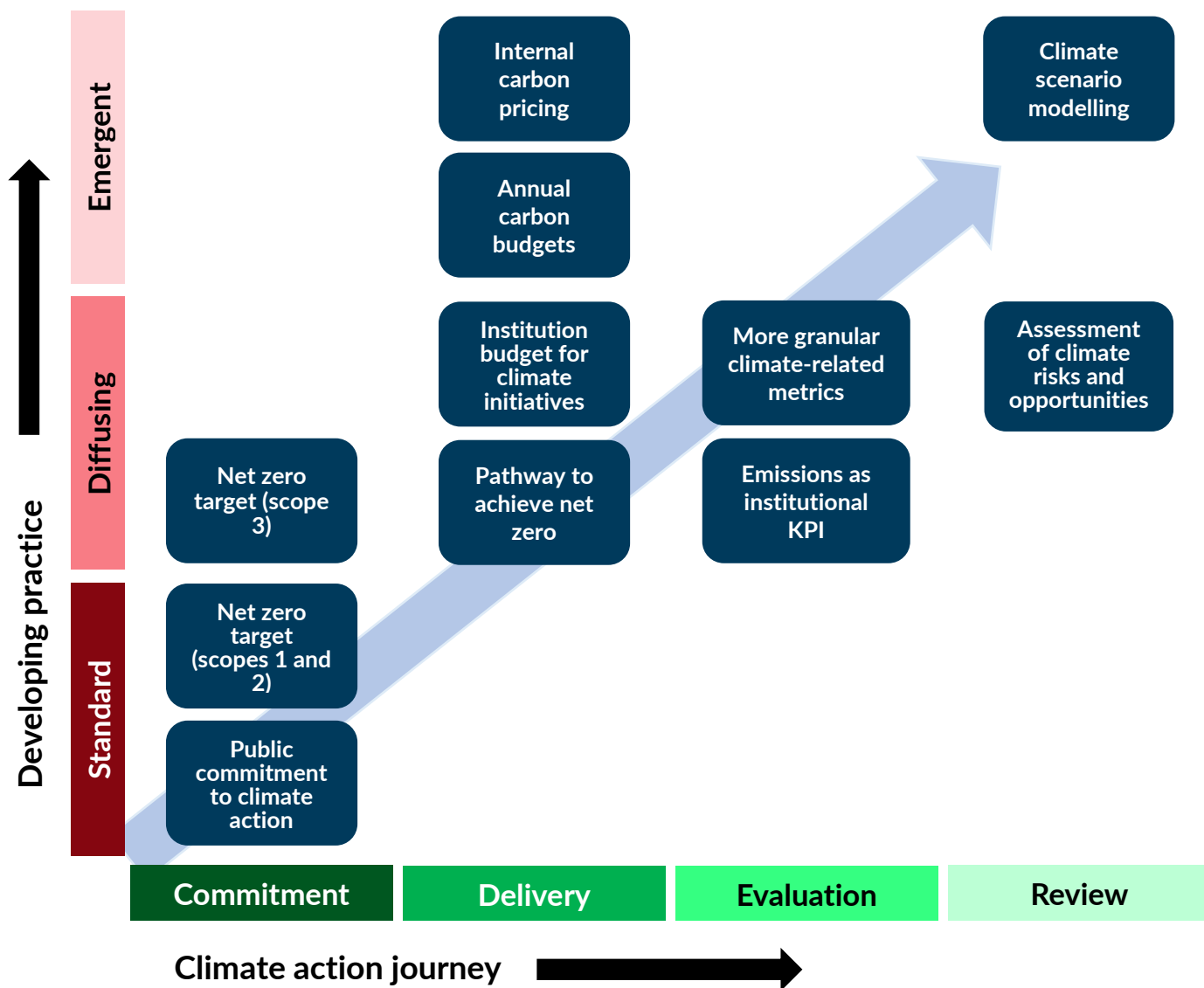


⁹ See Universities UK's (2021) *Confronting the climate crisis: A commitment from UK universities*. Page 5 sets out universities' commitments to set targets for scope 1 and 2, as well as scope 3 emissions; it further includes mission-related commitments around maximising universities' contribution to society's response to the climate crisis.

The integration measures, and groupings of measures which are now **standard**, **diffusing** and **emergent** practice, are mapped against the climate action journey in figure 10.

While a commitment and top-level targets can be considered standard practice these days, approaches for delivery and evaluation are in the process of diffusing across the sector, and some approaches for delivery (carbon budgets and carbon pricing) are still emergent, with only a small number of institutions experimenting with them at this stage. Also emergent are practices incorporating climate into long-term forecasts and review of plans through modelling climate scenarios.

Figure 10: The climate action journey and developing practice¹⁰



These patterns appear to indicate that many institutions are on the first cycle of their climate action journey: having set their first commitments and targets, they are working through approaches towards achieving these. Early-mover institutions which set their climate action path some years ago may now be reaching the point where they review their approach. For some, this has meant refining and sharpening their methods towards pursuing their existing targets; others have found that their initial net zero targets were too ambitious to be achievable in practice, and have needed to extend their timelines.

¹⁰ Assessment of climate risks and opportunities was surveyed in the *effectiveness of practice* survey questions rather than the *integration* questions. It is included on this model as a diffusing practice, with 54.2% survey respondents agreeing or agreeing strongly that climate-related risks and opportunities are regularly scanned at their institution.

Institutions' views on the effectiveness of their practice

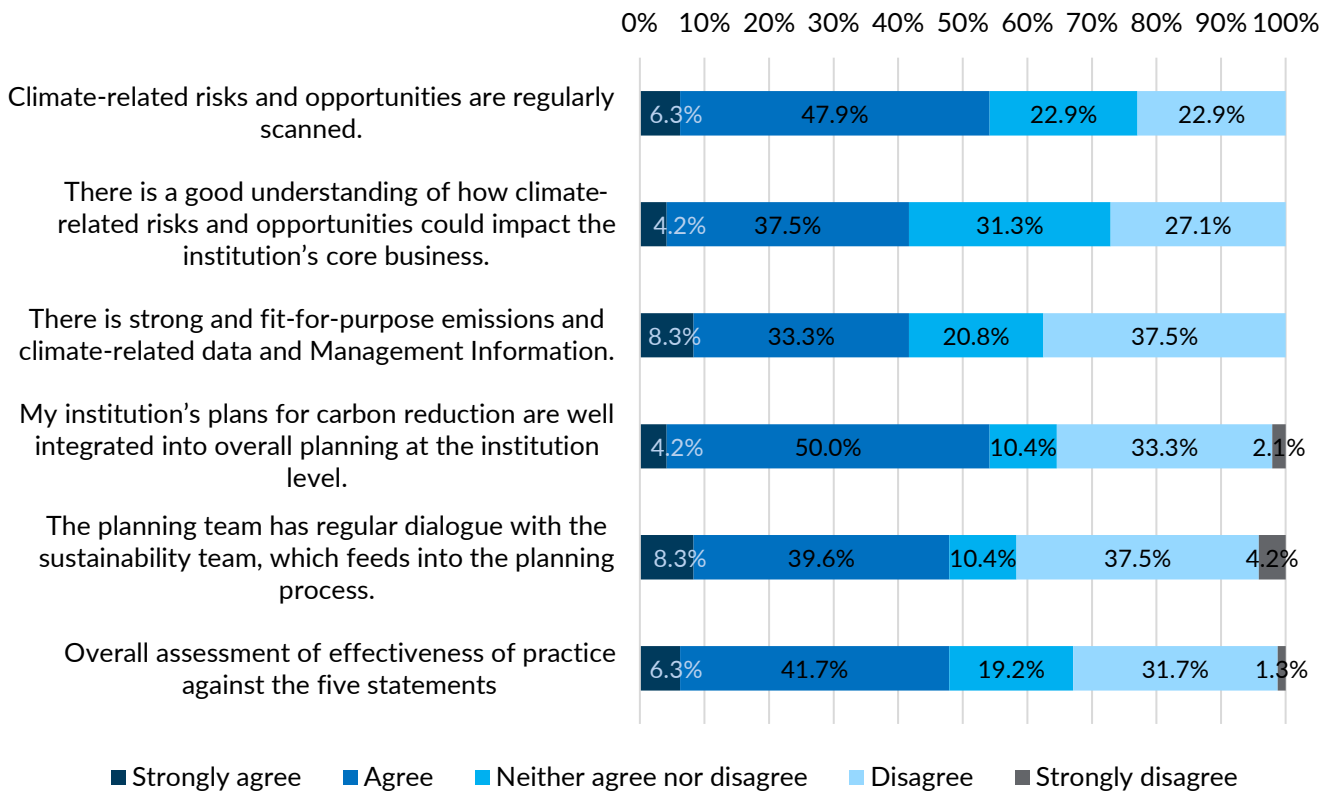
Survey respondents were asked to respond to a set of five statements around the effectiveness of their practice. The statements covered five areas which represent *general good practice for approaching any strategic driver* in strategy and planning:

- Risks and opportunities around the driver are regularly scanned.
- The potential impacts of the risks and opportunities are well understood.
- Good data is available to support evaluation and decision-making.
- The driver is integrated into planning at the institution level.
- Specialist expertise is used appropriately.

In general, around half of respondents agree or strongly agree that their institution's practice aligns with the good practice statements (ranging from 41.7% to 54.2% across the various statements), while around one third of institutions (between 22.9% and 41.7% across the statements) disagree or strongly disagree. The remainder of respondents neither agree nor disagree, which varies from 10.4% to 31.3% across the different statements. This data is shown in figure 11 (rounded to one decimal place).

Respondents' overall assessment of the effectiveness of their practice (calculated from the average of scores across the five statements) shows that overall 47.9% of respondents agree or strongly agree that their practice is effective, 32.9% disagree or strongly disagree, and 19.2% neither agree nor disagree. In other words, this data indicates that around half of respondents feel broadly confident with their approach, while a similar proportion (that is, all those who did not agree or strongly agree) do not.

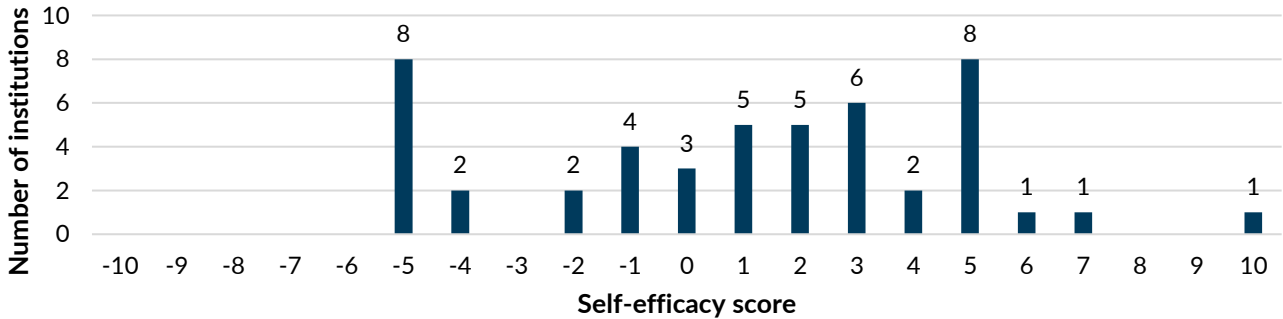
Figure 11: Sector-level assessment of effectiveness against good practice statements



Based on the responses, a “self-efficacy score” has been calculated for each institution by assigning a numerical score to each response as follows: Strongly agree = 2; Agree = 1; Neither agree nor disagree = 0; Disagree = -1; Strongly disagree = -2.

As with the integration scores, most institutions are situated in the middle ground (between -5 and 5 on the scale of -10 to 10). This reflects the fact that answers in which respondents strongly agreed or strongly disagreed with the good practice statement were rare (less than 10% for any answer).

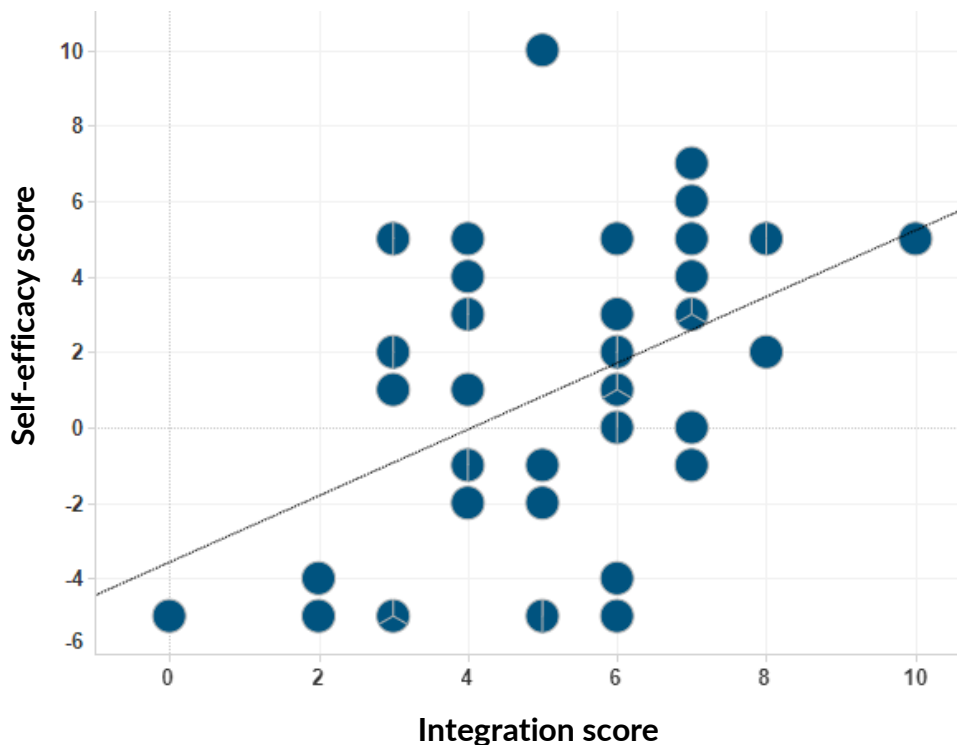
Figure 12: Institutions’ self-efficacy scores for assessment of effectiveness against good practice statements



When we map each institution’s self-efficacy score against its integration score, we see that – despite a few anomalies representing “noise” in the data – there is a correlation (denoted by the black line in figure 13) between respondents’ confidence in the effectiveness of their practice and the number of specific measures they have adopted to integrate climate into their strategy and planning¹¹.

This is perhaps unsurprising, and suggests that capability around achieving good practice in general translates into an ability to adopt specific diffusing and emergent practices, although it could also be the case that confidence has increased from successful implementation of integration measures.

Figure 13: Correlation of institutions’ integration scores (x axis) with self-efficacy scores (y axis)¹²



¹¹ The correlation coefficient of 0.45 can be considered moderate, which is likely to reflect both real variability at respondent institutions and noise in the data.

¹² Datapoints split two or three ways indicate that more than one institution had the same scores.

The rows are ordered according to the primary responsibilities around the two themes with the strongest relevance to the focus of this report: i) integrating climate-related objectives into institutional strategy followed by ii) integrating carbon into overall planning at the institution level¹³.

The 15 role types are loosely grouped into nexuses through colour groupings: university leadership or governors (purple), senior academic leader (orange), cross-functional professional services leader (typically Chief Operating Officer, yellow), sustainability and estates (green), and finance and strategic planning (blue).

The landscape of roles and responsibilities is diverse across respondent institutions: while responsibility for handling carbon data lies with sustainability or estates functions in the great majority of cases (as shown by the nearly solid green of columns 5 and 6), strategic integration is highly diffuse.

Broadly moving from top to bottom – integration of strategy (column 1) and planning (column 2) are led at some institutions (purple cells in column 1) by the Vice-Chancellor or leadership team, while at others it is a senior academic leader (the most common model), the sustainability-estates nexus, the finance-strategic planning nexus, the Chief Operating Officer, or in some cases there are joint responsibilities. Some respondents (indicated by rows towards the bottom of the chart) reported either that responsibility was unclear or that they are not integrating climate into strategy and planning¹⁴.

If columns 1 and 2 are coloured the same, this indicates that the same role or function is responsible for integration into both strategy and planning. At many institutions this is the case but there are many cases where the responsibilities are different. At the upper and lower ends of each block of colour in columns 1 and 2, we see responsibilities shading across functions, in some cases with different responsibilities for strategy and planning integration and in others with joint responsibilities across functions. Needless to say, organisations and individuals draw different boundaries between strategy and planning, which is also likely to have influenced this picture.

Accountability for overall progress on net zero (column 3) is also diverse, although as might be expected this most commonly sits with a senior academic leader, likely to be a member of the leadership team. A number of respondents reported that the sustainability or estates teams are accountable, which suggests that these institutions may still consider the climate agenda to be essentially a technical question.

Overall accountability resting with a member of an institution's leadership team can be considered good and recommendable practice (research and professional practice in change management indicate that senior sponsorship is the most critical factor in achieving major change). But the fact that the role with accountability for the agenda (in other words, its senior sponsor) appears in many institutions also to be responsible for the vehicles of its delivery (strategy, planning and investment) raises the question of how different institutions define and distinguish responsibility and accountability.

Many institutions reported not having an institution-level budget for climate-related initiatives (as shown by the large number of pink cells in column 4) but for those that do, this is most commonly owned by the sustainability or estates function, and in a number of cases by a senior academic leader or the finance function. These responses raise interesting questions around coordinating investment: such budgets may be targeted towards technical interventions, mission-related initiatives or a mixture of the two. Ownership by the sustainability-estates nexus might often reflect the former and by a senior academic leader the latter, however from the data alone this is not clear.

¹³ Although it is worth pointing out that this data could have been ordered and grouped in many different ways due to the diverse picture of responsibilities and accountabilities at different institutions.

¹⁴ One institution, the final row, did not respond to this section of the questionnaire.

There is not space to provide detailed comment on the full range of structures and approaches evident in this data, but its diversity reflects the facts that:

- the strategic dimensions of climate and carbon are still a relatively new agenda for the sector
- two of the relevant functions (strategic planning and sustainability) are amongst the newer professional functions in universities, and themselves display a wide range of forms (with variable degrees of resource) across the sector
- the sector respondents are highly diverse, ranging from large universities with more than 30,000 students to small institutions where resourcing can be a particular challenge¹⁵.

Consequently, in this space largely without established models and precedents, institutions have adopted their own approaches reflecting their specific context. Discussions with respondent institutions also indicate that a lot of experimentation is underway, as universities test and refine structures for embedding climate as a strategic driver.

A number of the institutions that we spoke to have strong and strategic sustainability functions, which are closely involved with all strands of the climate agenda. Prominent among these is the **University of Edinburgh**, where the sustainability team has responsibilities around integrating carbon into planning across the institution, also contributing specialist knowledge around developments in the field that feeds into the corporate strategy and KPIs.

Swansea University's sustainability team has also taken on an increasingly strategic role. In addition to owning the institution budget for climate initiatives, the team has played a growing role in supporting mission-related aspects of the climate agenda in teaching & learning and research, and advises the COO on integration of climate into institutional strategy and planning.

The **University of Worcester** has taken a different approach around responsibilities. While the sustainability team is small, the function lead is considered an internal consultant and provides high-level counsel to the university's senior leadership, who have taken on direct ownership of key strands of the sustainability agenda for many years, under the sponsorship of the Vice-Chancellor. Again, the sustainability function contributes directly to the university's annual budgeting process.

King's College London has consolidated its climate and sustainability activities under the leadership of a senior academic leader, who holds responsibility for navigational elements of the agenda as well as the mission-related strands such as increasing the university's impacts around education and research related to climate. The university has taken a decision to establish a transformational project, with support from the strategy and planning and sustainability functions, to bring together the technical and business change elements of the agenda to further reduce carbon emissions.

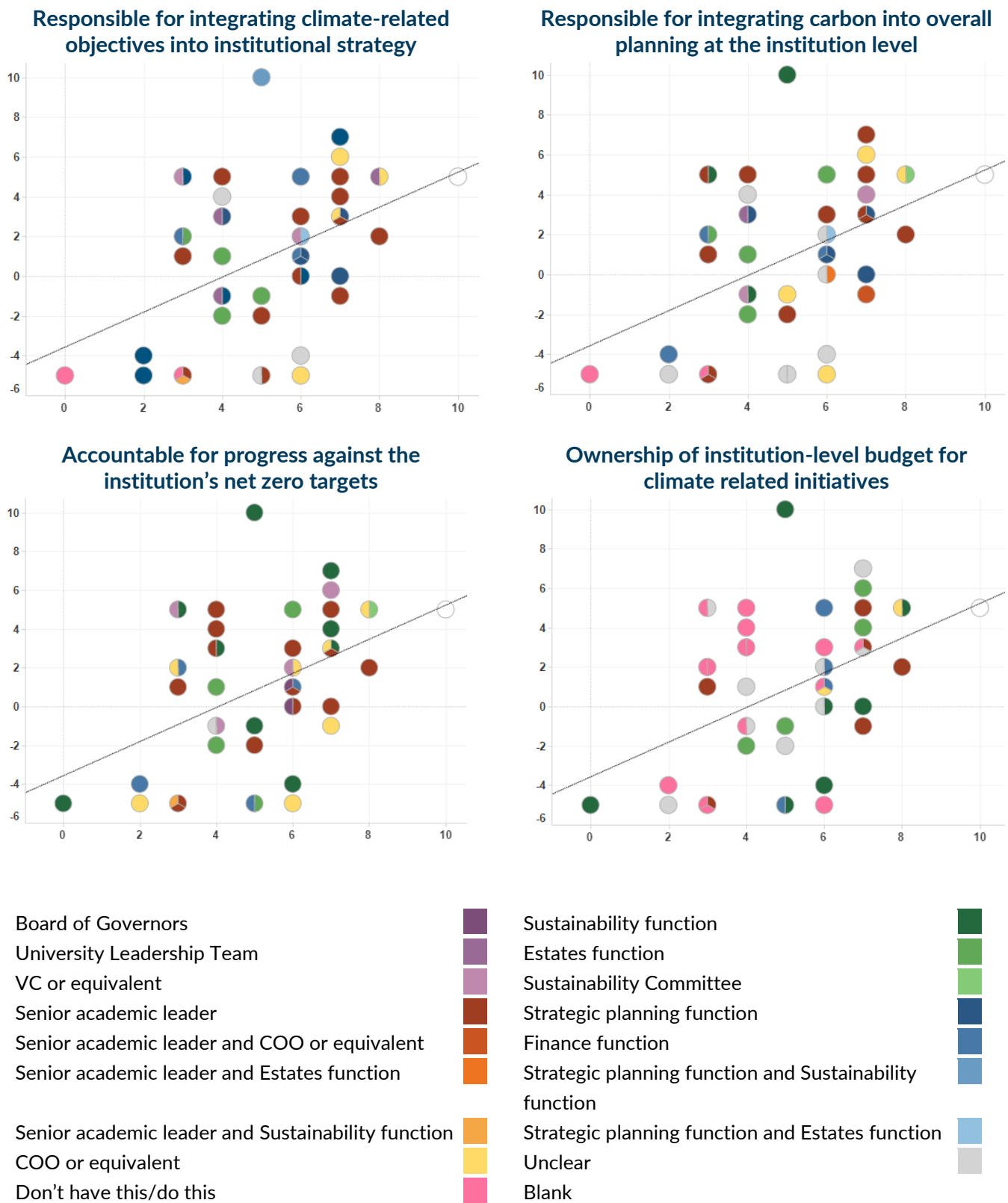
The data on roles and responsibilities has also been mapped in figure 15 to the data correlating institutions' self-efficacy and integration scores, to investigate whether any particular model of leadership for the strategic agenda is associated with higher scores.

No strident picture emerges of any superior model: institutions across the ranges of self-efficacy and integration scores show a wide variety of responsibilities for leadership around the various strategic strands, and there is no definitive relationship between high scores and the leadership of any area. Some tendency for leadership of a senior academic leader to score fairly well may be discernible across some strands, but there are multiple exceptions.

This data shows that different models can work well in different places according to context, although again it is worth remembering the role of senior sponsorship in achieving major change.

¹⁵ See Guild HE. 2023. *Tackling the Climate Crisis: A view from smaller and specialist universities and colleges*.

Figure 15: Relationship between institutions' integration scores (x axes), self-efficacy scores (y axes) and roles and responsibilities (datapoint colours) around various strands of the strategic agenda

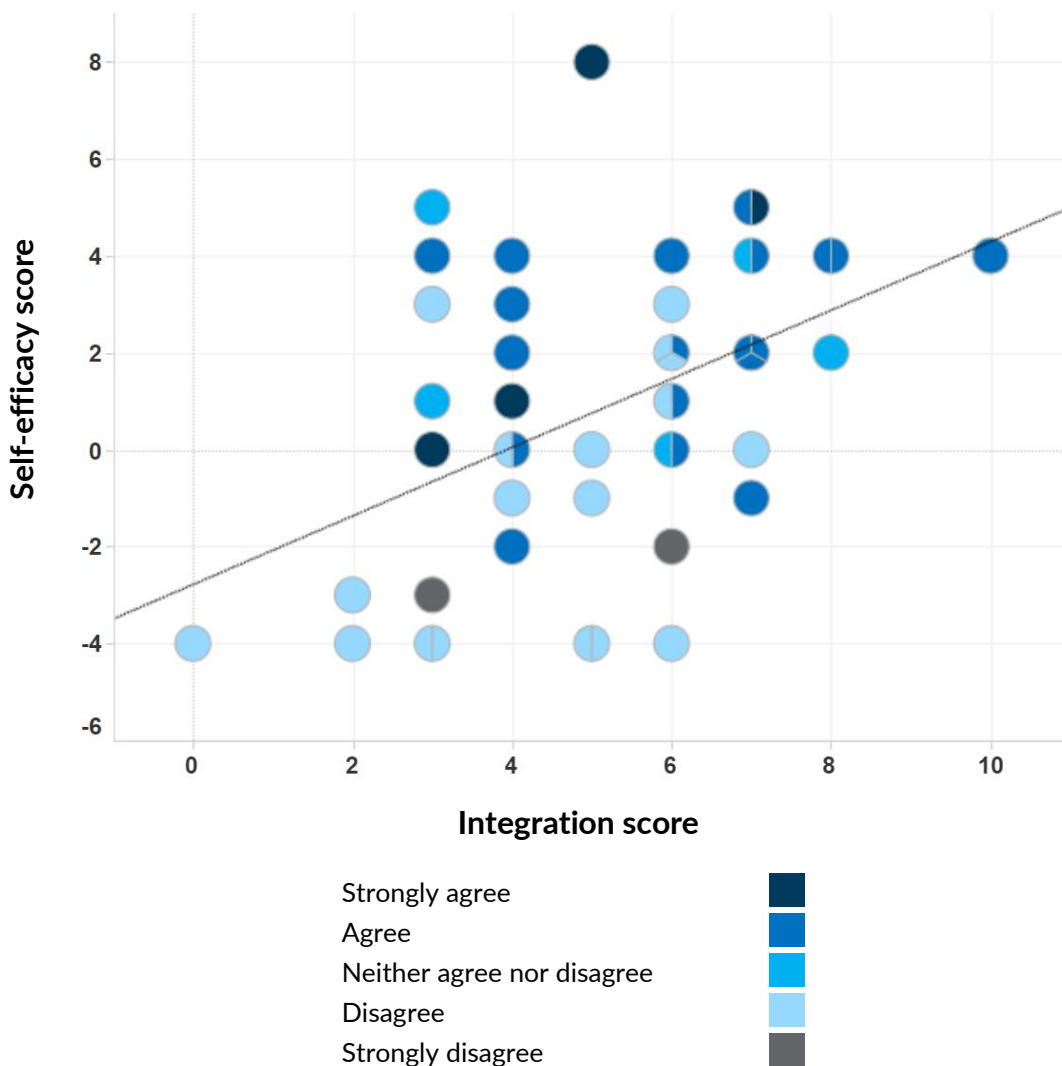


The variable that *does* show a stronger relationship with high integration and high self-efficacy scores is institutions' responses to the statement "the planning team has regular dialogue with the sustainability team, which feeds into the planning process".

Here, the relationship between high scores and respondents who agreed or strongly agreed with the statement on the one hand, and low scores and institutions who disagreed or strongly disagreed with the statement on the other comes out quite strongly (indicated on figure 16 by the darker blue datapoints towards the top right with none below 0, and lighter blue and grey datapoints towards the bottom left)¹⁶.

The fact that collaboration between professional functions is more strongly linked to progress in this agenda than leadership by any particular area must be a key takeaway from this survey; and underlines the critical importance, which we have stressed throughout this report, of bringing together the specialist skills and expertise from all professional groups for institutions to respond effectively to the strategic dimensions of the climate crisis.

Figure 16: Relationship between institutions' integration scores (x axes), self-efficacy scores (y axes) and responses to the good practice statement "the planning team has regular dialogue with the sustainability team, which feeds into the planning process" (datapoint colours)



¹⁶ Scores for responses to the good practice statement "the planning team has regular dialogue with the sustainability team, which feeds into the planning process" have been removed from institutions' self-efficacy scores for this exercise, to ensure that the variables are assessed independently. This reduces the total range of possible self-efficacy scores from between -10 and 10 to between -8 and 8.

Part Three

Where from here?



One of the goals of this project has been to understand where the strategic planning community sees its current strengths and obstacles around this agenda, and what would be needed to make progress towards integrating climate into institutional strategy and planning.

A discussion on these topics at the HESPA conference workshop in March 2023 identified a number of factors which participants felt are slowing the agenda in their institutions at present. These included a lack of a clear vision or steer at some institutions; trade-offs between achieving operational impacts and mission-related impacts; time lags between decisions and evidencing outcomes; poor data and integration; and the challenges of coordination across multiple departments.

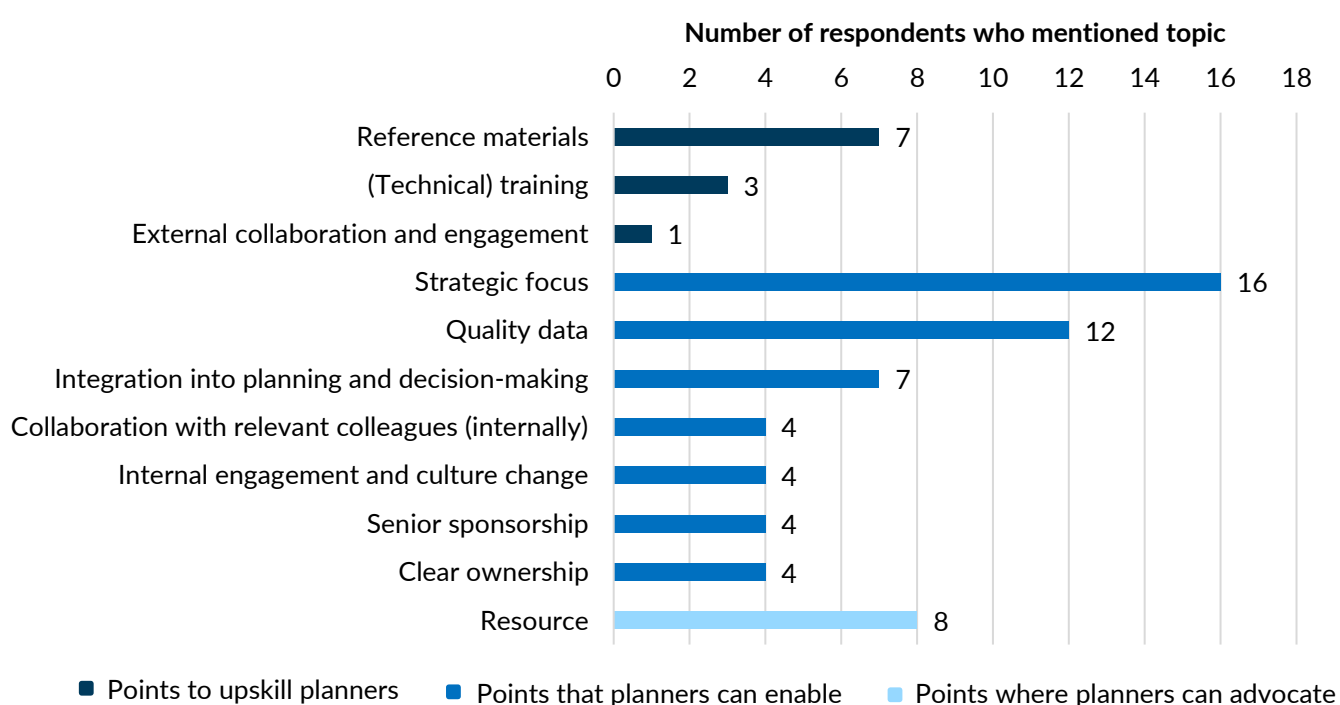
All of these are points where the remit and skillsets of the strategy and planning function can be brought productively to bear. However, the discussion also highlighted that many planners feel they do not have sufficient knowledge of climate (and more widely, sustainability) as a subject to be able to engage with it meaningfully at present, which hinders their ability to integrate it into their work.

The question that follows is what would be needed for strategic planners to be able to do this most effectively. This was explored through an open text question in the sector survey, for which respondents' answers were coded by theme and yielded the responses below. The responses again reflect a mixture of planners' own capabilities and the institutional context they are working in. While points such as strategic focus and quality data are mentioned in many answers, these are things which planners themselves can enable, if they have the relevant subject knowledge.

The points are categorised into three groups, which are broadly sequential:

1. Points that would upskill planners and enable them to engage fully with the subject
2. Points that planners themselves can enable at their institution once equipped with this knowledge, collaborating with other specialist functions such as sustainability, finance etc.
3. Points where planners can advocate and influence, once the agenda has been sufficiently developed.

Figure 17: Survey respondents' views on what would be needed for the planning team at their institution to respond effectively to the climate challenge



This report is intended as an initial contribution towards upskilling.

To further support strategic planners to develop the knowledge of climate and sustainability that they need to contribute most effectively to this critical agenda, HESPA and SUMS Consulting are establishing a Special Interest Group focusing on Sustainability in Strategy and Planning.

The group is intended to respond to the upskilling points reflected in the survey data: supporting external collaboration to share knowledge and practice, enabling the development of sector and function-appropriate reference materials, and identifying needs for technical training around the most complex topics.

The group's aims are to:

- facilitate networking between strategic planning colleagues from the UK HE sector around integrating sustainability dimensions into institutional strategy and planning
- support the sharing of best practice around the topic
- act as a forum for discussing related issues and a resource for the development of joint solutions
- provide an opportunity for strategic planners to work together on areas of common interest and collaborate on projects
- produce tangible outputs or resources which can be used by other group members and shared as tools for wider sector use
- develop understanding of sustainability imperatives and their strategic dimensions amongst university senior leadership teams.

Building on this project which has focused exclusively on climate and carbon, the group's scope of interest is sustainability broadly defined – that is, the range of environmental, social, economic and governance imperatives which are reflected in holistic frameworks such as the United Nations Sustainable Development Goals, and their relevance for university strategy and planning.

Membership of the group is open to institutions which are members of HESPA or SUMS Consulting.

Although the group is primarily aimed at strategic planners, the cross-cutting nature of this topic militates towards cross-functional collaboration; and colleagues from other professional groups with an interest in this area are welcome.

Further information about the group is available from info@hespa.ac.uk or sums@reading.ac.uk.

Appendices



Appendix 1. References and further reading

AUDE, BUFDG, EAUC. 2023. *The Cost of Net Zero*.

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<https://www.universitiesuk.ac.uk/sites/default/files/field/downloads/2022-03/How%20the%20climate%20crisis%20affects%20internationalisation.pdf>

Appendix 2. Sector survey full text

1. Introductory questions

- Name
- Institution
- Department title
- Job title
- Email address

2. Impetus for agenda

Which has had the strongest effect putting carbon emissions/climate action on your institution's agenda?

Please rank in order of importance.

- Commitment from senior leadership
- Staff sentiment/campaigning
- Student sentiment/campaigning
- Developing expectations of funders or external stakeholders
- Energy prices
- Other

3. Focus and integration into institutional agenda

Please say whether the following statements are true ("yes") or not ("no") at your institution, at present.
(Response options: Yes/No/Don't know)

1. My institution has a commitment around climate action in its strategy or prominent public documents.
2. My institution has a target year for achieving net zero in scopes 1 and 2.
3. My institution has a target year for achieving net zero in scope 3.
4. My institution has a pathway for achieving its net zero target.
5. My institution has annual carbon budgets.
6. My institution has carbon emissions as an institutional KPI.
7. My institution uses more granular climate-related metrics for performance management of progress towards net zero targets.
8. My institution has an institution-level budget envelope to fund climate initiatives.
9. My institution models the impacts of different climate-related scenarios on its strategy and finances.
10. My institution has experimented with or is using internal carbon pricing.

4. Effectiveness of current practice

Please indicate the extent to which you agree with the following statements.

(Response options: Strongly agree/Agree/Neither agree nor disagree/Disagree/Strongly disagree)

1. My institution's plans for carbon reduction are well integrated into overall planning at the institution level.
2. The planning team has regular dialogue with the sustainability team, which feeds into the planning process.
3. Climate-related risks and opportunities are regularly scanned.
4. There is a good understanding of how climate-related risks and opportunities could impact the institution's core business.
5. There is strong and fit-for-purpose emissions and climate-related data and Management Information.

5. Roles

Please provide the job title of the relevant person and the department/team they are based. If you only know the department, please provide that.

(Response options: Open text. We are looking for EITHER the relevant job title or department, “Unclear” or “We don’t have/do this”)

1. Who is accountable for progress against the institution’s net zero targets?
2. Who is responsible for compiling carbon data?
3. Who is responsible for publishing the carbon data?
4. Who is responsible for integrating climate-related objectives into institutional strategy?
5. Who is responsible for integrating carbon into overall planning at the institution level?
6. If there is an institution-level budget for climate related initiatives, who owns it?

6. Needs

(Response options: Open text)

1. What would be needed for you to feel that the planning team can respond effectively to the climate challenge?
2. What would be needed for you to feel that your institution as a whole can respond effectively to the climate challenge?
3. Would you be interested in joining a Community of Practice focusing on climate and sustainability in strategy & planning?
4. Would you be happy to feature as a case study in the state of practice report we are preparing? This would involve a short conversation around the state of practice at your institution.
5. If you have any other thoughts on this matter that you’d like to share with us, please do so here.

Appendix 3. Acknowledgements

Thanks are due to the following people, who kindly lent their time to discuss topics explored in this report, share insights from their organisations or provide comments on the draft:

Ben Fagan-Watson
Bernarde Hyde
Brendan Donegan
Claire Taylor
Fiona Goodwin
Fola Ikpehai
Frans Berkhout
Hannah Al-Katib
Harriet Waters
Jane White
Jen Summerton
Jennifer McGregor
Joel Arber
Karel Thomas
Kat Thorne
Katy Boom
Kirsti Norris
Laura Knox
Lisa Ambler
Michelle Pepin
Navindu Katugampola
Paul Roberts
Rhiannon Birch
Ruth Buckingham
Tammy Armstrong
Teifion Maddocks
Tom Yearley

For design, thanks are due to:

Jo England
Lorren Harvey



in partnership with

