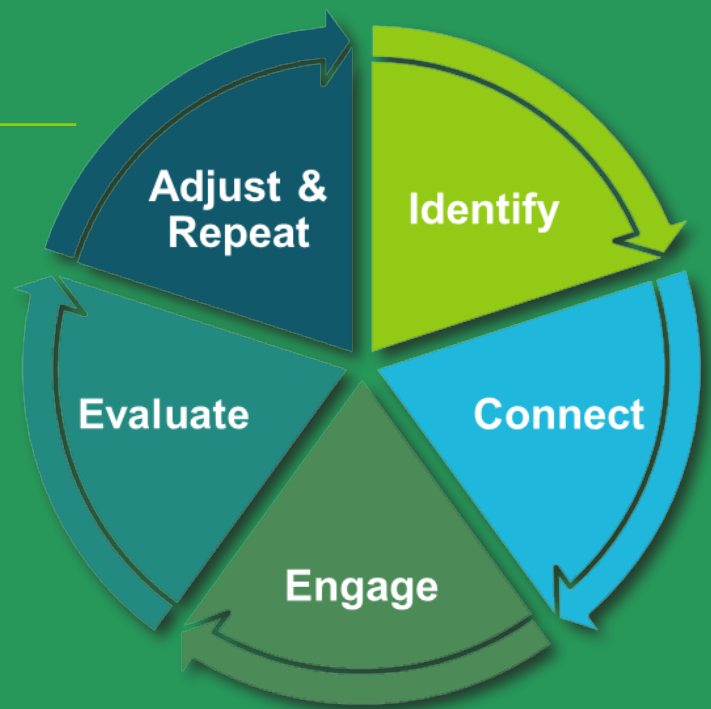


Community Engagement: A Basic Framework

Community members are the best source of expertise on what they want and need, where they face challenges, and what strategies will work best in their communities. Successfully engaging with customers is a long-term commitment. When people give you their time, insights, and ideas, they want to know that you hear them, and that you are taking actions that reflect their input. These basic steps form a framework that can be used to design your own approach to engage communities in energy planning.

IDENTIFY

- Articulate the purpose and goals (or the reason for) the community engagement effort.
- Map communities or populations that will be impacted by the program or investment.
- Consider others at your utility who may be reaching out to specific communities that you are targeting and coordinate whenever possible.
- Reach out to community-based organizations and community leaders to secure partners in the planning and implementation of the project.



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CONNECT

- Work with community leaders to establish a process and practical schedule for connecting with their community members.
- Establish shared expectations and definitions of key terms related to energy planning such as energy burden, rate structures, community solar, etc.
- Use culturally and linguistically appropriate communications (written and verbal).
- Hold meetings in locations that are known and convenient for community members. Consider leveraging existing meetings if possible and appropriate.
- Ensure accessible and inclusive engagement by offering options to attend at different times of the day/week, language translation, and options for those with low/no Internet access.
- Offer wraparound services like childcare, meals, and transportation.
- Compensate community organizations and meeting participants for their time and expertise.

ENGAGE

- Create an atmosphere that provides opportunities for all participants to speak and encourages them to share their views and personal experience.
- Practice active listening.
- Learn about local energy equity issues and recognize historical actions that have impacted the community.
- Reflect back to community members what you heard and verify that you have correctly summarized their goals, challenges, needs, ideas, and insights in an iterative process.
- Be transparent about the process and the utility's roll in the clean energy transition.

EVALUATE

- Conduct ongoing performance assessments around awareness, inclusion, satisfaction, and impact.
- Understand who may be missing from the discussions. Are there ethnic groups, age groups, or neighborhoods that are not represented?
- Measure how effective you are at integrating the input from the community meetings into your planning process.
- Develop metrics around program goals that will be tracked throughout the lifetime of the program or investment. Metrics should measure the success of a program as defined by community members (e.g., money saved, lower energy bills, number of program participants, etc.)

ADJUST & REPEAT

- Focus on continuous process improvement by course-correcting as needed throughout the development and implementation stages of the project.
- Adjust approaches, strategies, and tactics to reflect evaluation learnings and community feedback throughout the efforts.
- Continue the 2-way dialogue to share plans and program designs at regular milestones and seek feedback and solutions from community members through project implementation.
- Communicate visible outcomes with the communities as the result of their participation in the energy planning process.

FURTHER RESOURCES

- The Spectrum of Community Engagement to Ownership** (Facilitating Power, 2021). Emerging industry standard language about levels of engagement and decision making.
- Community Engagement Brief** (WE ACT for Environmental Justice, 2022). Community-driven best-practices for engagement, environmental justice analysis, and public participation.
- Best Practices for Meaningful Community Engagement** (Groundwork USA, 2018). Questions to ask to understand why particular segments of communities are missing from or not participating in a program or process, and possible solutions.
- U.S. Council on Environmental Quality Climate & Economic Justice Screening Tool, U.S. EPA EJScreen, and Inflation Reduction Act Energy Communities.** Tools to identify priority communities in an area, screen for inequities, plan program/outreach activities, etc.
- Energy Equity Project Framework** (Energy Equity Project, 2022). Key terms and definitions.
- Designing Equity-Focused Stakeholder Engagement to Inform State Energy Office Programs and Policies** (National Association of State Energy Officials, 2020). A synthesis of community engagement steps; for state agencies but useful for utilities.
- FERC Office of Public Participation.** Resources and policies for increasing inclusion and access in formal engagement and public comment procedures.
- U.S. DOE Community Benefits Plans** A required framework for all BIL and IRA applicants to identify the communities impacted by a project and demonstrate engagement with those communities throughout all stages of the proposed project.
- Search for **state or local Language Access Plans or Policies**. The healthcare sector also offers standards and guidance; e.g. Centers for Medicare and Medicaid Services "Guide to Developing a Language Access Plan" or Massachusetts "Making Culturally and Linguistically Services (CLAS) Happen: Six Areas for Action."
- Web Content Accessibility Guidelines (WCAG).** A technical standard for web content.
- Leading with Equity** (American Council for an Energy Efficient Economy, 2023). Research and resources on strategies and success metrics for equitable decarbonization.
- Solar Climate Justice Scorecard** (Community Climate Collaborative, 2023). Could be used to compare or rank the quality of engagement used in project development.
- Energy Equity Project Framework** (Energy Equity Project, 2022). Impact metrics.
- Metrics for an Equitable and Just Energy System.** Pacific Northwest National Laboratory (2021). Impact metrics.

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