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Transforming ENERGY

Community Engagement Planning:

Key Concepts and Methods for Developing and Implementing a Collaborative Engagement Plan

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Session Overview

Description:

This session will focus on several community engagement strategies related to the planning and implementation of clean energy projects, with a focus on collaboration and participatory methods.

Learning Objectives:

We will explore a range of engagement strategies that support a collaborative approach to identifying and incorporating community priorities into energy transition initiatives. You will learn how to co-design objectives, measure impact, track progress toward project goals, and co-create a framework that ensures all stakeholders have a meaningful role in decision-making throughout the project life cycle.

AGENDA

Time	Activity
30 minutes	Community Engagement Presentation
5 minutes	Transition to Breakouts
25 minutes	Breakout Groups
20 minutes	Share Back

DEFINING OUR TERMS

KEY CONCEPTS

| COMMUNITY | ◀ DEFINITION IS BOTH FLUID AND SITUATIONAL |

| ENGAGEMENT | ◀ PARTICIPATION, DECISION-MAKING, PARTNERSHIP |

DEFINING OUR TERMS

COMMUNITY

"A **community** is a group of people with similar characteristics or a shared identity. Communities can be defined in geographic terms, such as people living in the same neighborhood or zip code area. Communities also can be defined based on information collected from the U.S. Census, such as race, ethnicity, culture, religion, political associations, education levels or income status. As you gather information it's important to understand how the community defines itself so that you share their view of what makes them a 'community'" (Giachello 2007, p. 9).

DEFINING OUR TERMS

COMMUNITY

PROJECT COMMUNITY:

- COMMUNITY TEAM/COALITION

- COMMUNITY STAKEHOLDER(S)

In technical assistance and public-facing projects, the term "community" can refer to different groups. Sometimes it means local stakeholders directly involved—such as local governments, utilities, or community-based organizations—who make up the project team. Other times, it refers to the broader local communities whose needs and priorities should shape the project.

DEFINING OUR TERMS

ENGAGEMENT

OUTREACH ≠ ENGAGEMENT

OUTREACH

- **One-way** communication
- **Informs** community members about an issue, problem, opportunity, or decision
- **Examples** include flyers in community spaces, mailers, website postings, meeting announcements.
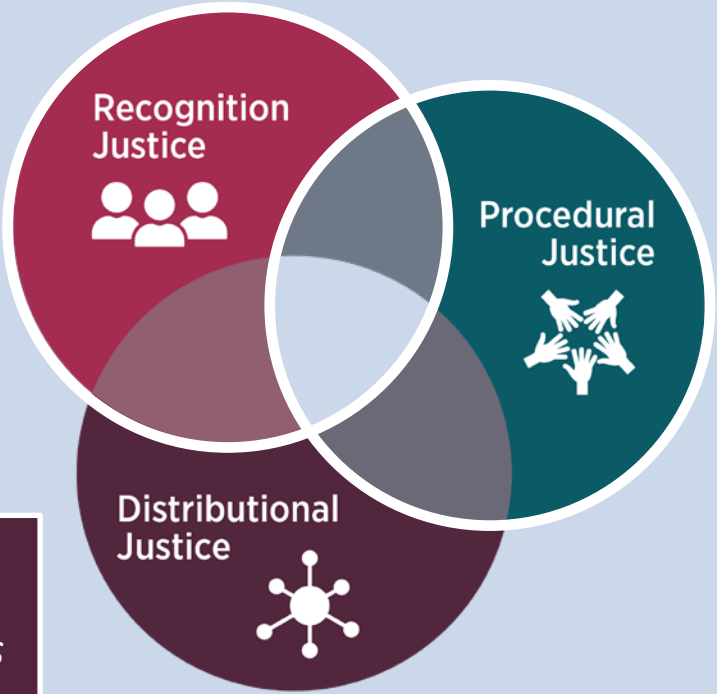
ENGAGEMENT

- **Two-way** iterative collaboration
- **Co-develop** decisions: informed community members participating in decision-making process
- **Process** of listening, discussion, deliberation, and decision-making.

WHY COLLABORATIVE ENGAGEMENT PLANNING?

THREE ENERGY JUSTICE TENETS

Identifying and redressing the historical and ongoing causes of inequity in the energy system

Recognition Justice

Procedural Justice

Ensuring fair, equitable, and inclusive participation in the decision-making process

Distributional Justice

Equitably distributing energy system benefits and burdens

FOUR PRINCIPLES FOR PRACTICE

To consider throughout your engagement with the project community

#	Principle To Inform Practice
1	**Authenticity**: Are we honest and respectful in our communication with the community partners and the commitments we make?
2	**Continuity**: Are we maintaining consistency in our project process, commitments, and goals?
3	**Transparency**: Are we providing all the information necessary in accessible formats for partners to make informed decisions?
4	**Accountability**: Are we developing mechanisms to hold ourselves accountable to maintaining an equitable process, following through with commitments, and achieving project goals?

ACTIVITY

Reflect on how you are currently incorporating inclusive engagement in your practice.
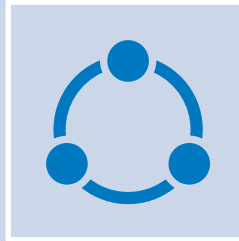
Part 1: How do you operationalize the four principles in your work with community partners?
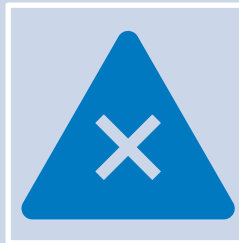
Part 2: What are the barriers? How have you or how could you overcome them?
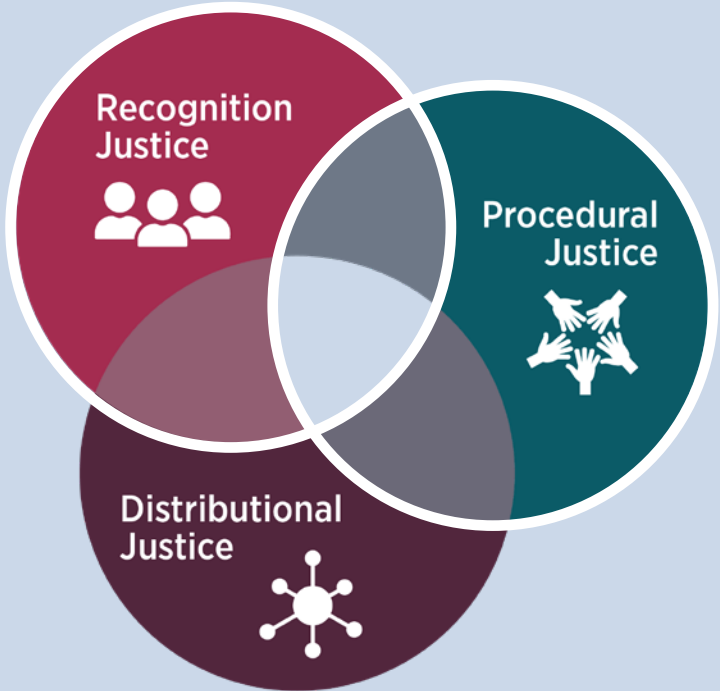
THREE ENERGY JUSTICE TENETS

Continuity

Database of Past and Ongoing Engagement

Transparency

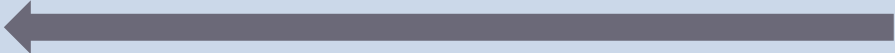**Accessible Network of Trusted Messengers**

Accountability

Metrics for Accountability

Accountability

Community-Grounded Indicators

Recognition Justice

Procedural Justice

Distributional Justice

Connecting Procedural Justice to Recognition and Distributional Justice

ENGAGEMENT STRATEGIES

ENGAGEMENT STRATEGIES

	Continuity	Transparency	Accountability
1. Institutionalize knowledge via centralized database of past and ongoing engagement efforts and results.	✔	✔	✔
2. Implement a collaborative platform for ongoing engagement.	✔	✔	
3. Invest and trust in community knowledge and capabilities.	✔	✔	
4. Co-develop community-grounded indicators aimed at building socially informed metrics to measure equity in the energy transition process and outcomes.	✔	✔	✔
5. Co-develop a participatory energy needs assessment and prioritization process.		✔	✔

1. CENTRALIZING INSTITUTIONAL KNOWLEDGE

Developing a central database or platform that houses knowledge, data, results, and partner contacts related to past and ongoing engagement.
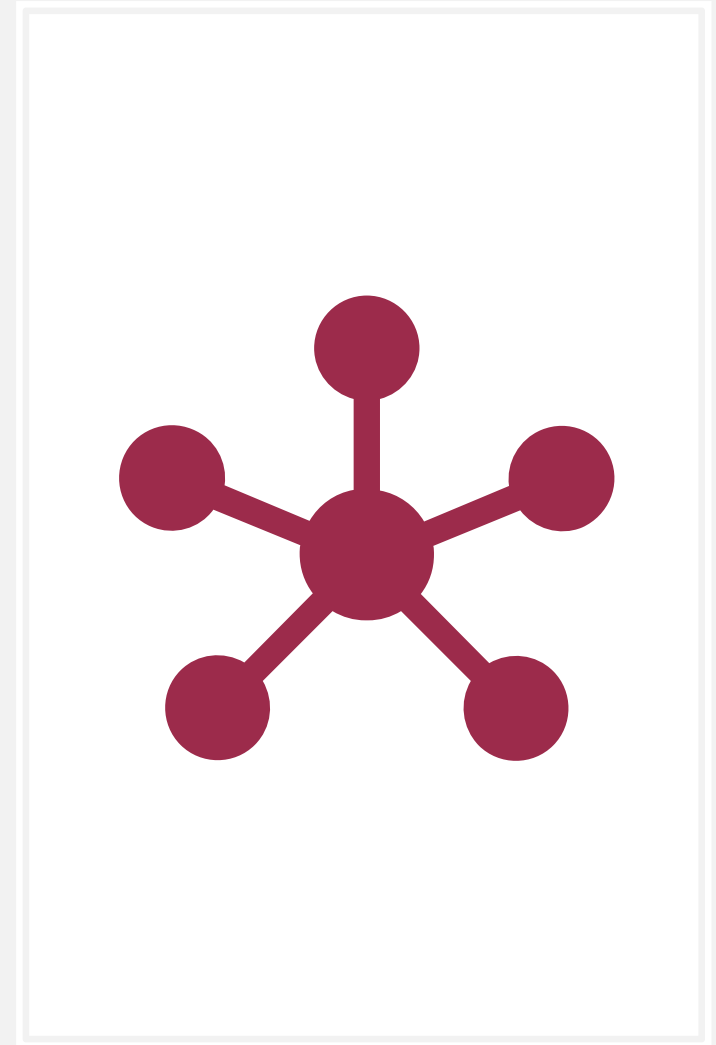
2. A COLLABORATIVE PLATFORM

A collaborative platform enables a network of Community-Based Organizations (CBOs) and trusted messengers to implement energy equity strategies with underserved and/or impacted communities.

Stakeholder/Community Mapping

Which stakeholder groups could be impacted by the project or are otherwise important to engage?

- In this context, stakeholders are those who may be affected by or have an effect on a specific project, plan, or effort.

What organizations represent this group or where they convene?

- For example, community- or faith-based organizations, neighborhood associations, unions, small-business associations.

Does this organization or group represent the priority communities?

- For example, underserved communities

In what ways could this stakeholder group benefit from this project/plan?

Have we, or a partner, engaged with them before? If so, on what project? How did it go?

Do we already have contact information for this organization? If not, how will we find it?

3. INVESTING AND TRUSTING IN COMMUNITY KNOWLEDGE AND CAPABILITIES

Investing in community knowledge about energy practices, government programs, and the energy transition can provide residents with a toolkit for making informed decisions about their own energy future.

CONSIDERATIONS FOR PARTICIPATORY PLANNING

ETHICS AND ENGAGEMENT

Even when a community engagement project does not qualify as "research with human subjects," the following ethics considerations that promote respect, transparency, continuity, accountability, and justice are important to incorporate into project planning and implementation.

Image Source: Rosner 2024

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DATA COLLECTION AND ANALYSIS

Data analysis is a crucial step in developing insights about a research project, planning intervention, or any other activity that calls for the systematized collection of information.

Before You Begin: Know Your Data

- Types of data: Generally, two common categorizations, based on the type of data you have gathered, determine the method of analysis. These categories are:
  a) Quantitative data and
  b) Qualitative data.

How to Understand Data Analysis

- Finding patterns and relationships in the data
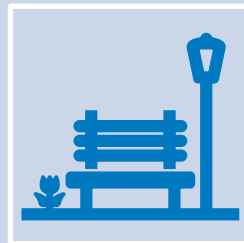- Creating a data analysis plan
- Finding connections that matter.

Presenting Your Data: How to Tell a Compelling Story

ACTIVITY

What data have you collected historically?

How have you gathered that data and input from community members?

4. & 5. CO-DEVELOP COMMUNITY-GROUNDED IMPACT ASSESSMENT

Moving into the space of accountability, developing assessment measurements with your community partners is key to building mechanisms that identify local objectives, track progress toward goals, and share decision-making power over time.

INDICATORS

"Indicator is…used to [quantitively] measure, approximate, or translate aspects of social, economic, or environmental reality [qualitative data] or used to quantify the effort of allocating resources or producing goods and services by public/private organizations." (Jannuzzi 2021, 1).

Like photographs, social, economic, and environmental indicators are approximate images of reality, that is, they are simplified representations of it, the better the more specific the aspects of interest in portraying and the more reliable and accurate the information used to calculate the measurements.

METRICS

A metric is a composite measure based upon the two or more indicators or measures that are weighted in the calculation of the full metric. Although they can be based upon qualitative and quantitative data, metrics are always quantitative measures.

Metrics help place a variable in relation to one or more other dimensions.

The more indicators are based on concrete experiences of a community, population, and so on, the closer their metrics will be to measuring the effects of changes in these communities' experiences and realities. We call these **community-grounded indicators** aimed at building **socially informed metrics.**

Source: Blanco and Rosner n.d.

EXAMPLE: INDICATORS → METRIC

Possible Metric	Possible Indicators	Percentage of Indicators
Community engagement	Participation rates	25%
	Feedback quality	25%
	Follow-up actions	20%
	Diversity of participants	30%

Template for Co-creating Assessments Measurements

Problem Objective:		Metric: Collaborative Community Engagement Process						
Problem Statement/ Communities' Priorities	*Research/Guiding Question (The question that creates the indicator)*	**What to measure (Indicator)**	**How to measure? What data should we use? (Is that a qualitative or quantitative indicator?)**	**Where to find the data? (In which communities, with how many households, who is the public?)**	**When to collect the data? (E.g., community events, online forums, etc.)**	**Who? (Who is participating in this process and who is responsible for the data collection?)**	**What tools will be used to measure this indicator? (E.g., interviews, questionnaires, listening sessions)**	*Expected Outcomes*
Previous community engagement efforts were one-way, singular actions.	How is community engagement developed across the program planning and implementation phases?	1. Participation rates	Total # of attendees ---------- Demographics of participants ---------- Barriers to participation	-				
		2. Quality of feedback						
		3. Follow-up actions						
		4. Diversity of Participants						

HOW TO DESIGN PARTICIPATORY STRATEGIES FOR COMMUNITY ENGAGEMENT

Why do metrics matter?

METRICS HELP US QUANTIFY THE IMPACT OF A PROJECT.

METRICS CAN BE CREATED USING DIFFERENT QUANTITATIVE AND QUALITATIVE DATA INPUTS.

THE FRAMEWORK AND PROCESS

How to use this framework

Initial Engagement and Data Collection

Identifying What You'll Measure (Indicators➔Metric)

Building Impact Assessment Metrics

Developing Scale and Instruments for Assessment

BREAKOUT GROUPS!

25 min

SHARE BACK!

20 min

Thank You!

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