



A Shared Understanding and Paths Forward for Community Benefit Mechanisms: Workshop Summary Report

Matilda Kreider, Michael Behrmann, Chloe Constant, and Suzanne MacDonald

National Renewable Energy Laboratory

**NREL is a national laboratory of the U.S. Department of Energy
Office of Energy Efficiency & Renewable Energy
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List of Acronyms

CBA	community benefit agreement
CBM	community benefit mechanism
DOE	U.S. Department of Energy
EERE	Office of Energy Efficiency and Renewable Energy
NREL	National Renewable Energy Laboratory
SETO	Solar Energy Technologies Office
WETO	Wind Energy Technologies Office

Executive Summary

On Oct. 7–8, 2024, the U.S. Department of Energy’s Office of Energy Efficiency and Renewable Energy and the National Renewable Energy Laboratory hosted an in-person workshop focused on research needs and strategies for community benefit mechanisms (CBMs) used in the deployment of utility-scale renewable energy infrastructure. In attendance were approximately 65 participants representing nonprofit organizations, universities, national laboratories, Tribal entities, renewable energy developers, and federal and state government agencies.

Community benefit mechanisms, such as community benefit agreements (CBAs) or funds, are mechanisms that can be used to enhance benefits and/or mitigate negative effects of energy development for the communities that that host, are proximate to, or are otherwise impacted by the development.¹ Interest in CBMs has rapidly increased among various stakeholder groups working to advance equitable, community-supported renewable energy deployment. As a result of the diverse and growing interest and body of work on this topic, there is a need for coordinated leadership that ensures various efforts are aligned and strategic, creates a clear path for collaborations, and incorporates diverse perspectives into strategy on community benefits.

This workshop aimed to assess the current state of knowledge, tools, practices, and lessons learned related to CBMs and to identify research and other work needed to improve their impact and effective implementation. Through interactive exercises, participants discussed key issues, ideas, and themes pertinent to the theoretical and applied aspects of CBMs, which are summarized in Table ES-1 and described in greater detail in this report.

Through discussion and engagement with a diverse, experienced group of participants, this workshop highlighted the broad and growing landscape of actors, activities, and priorities related to the use of community benefit mechanisms in the U.S. renewable energy sector. By testing frameworks and definitions and sharing participant experiences and perspectives, the workshop helped to reach greater clarity about concepts and practices relevant to CBMs. It also laid the foundation for opportunities to increase coordination and collaboration on CBM research and practices. While the event was not designed to arrive at a consensus for best practices or future actions, the workshop planning team did identify a series of possible next steps that are outlined at the end of this report; these include potential future convenings, research projects, partnerships, and capacity-building efforts.

¹ It should be noted that this workshop did not focus on Community Benefits Plans, which are a specific requirement attached to nearly all Bipartisan Infrastructure Law and Inflation Reduction Act funding from the U.S. Department of Energy. Given that the Community Benefits Plan is a concept with clearly defined meaning and procedures, it was a lower priority for the coordination and strategy objectives of this workshop.

Table ES-1. Summarized Themes Identified From Workshop Discussions

Summary of Key Themes	
Implementing community benefit mechanisms on the ground	Engagement processes
	Power dynamics and representation
	Developer-community relationship
	Timing and longevity
	Accountability and impact measurement
	Scale and feasibility
Theoretical and strategic elements of community benefit mechanisms	Defining and delineating community benefits
	Purpose and high-level impact
	Requirements and standardization
	Ability to adapt and change course
	Coordination, strategy, and guidance

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1 Workshop Purpose and Structure

Community benefit mechanisms (CBMs)² can be used to provide increased benefits for the communities that host, are proximate to, or are otherwise impacted by a utility-scale energy project as well as to mitigate negative impacts. CBMs can take different forms,³ like a community benefit agreement (CBA) or a fund, and have been used differently across energy technologies, regions, and time. At least in the United States, there is no standardized or universal format, definition, or understanding of what CBMs are, what their purpose is, how they should be implemented, and how successful they are in achieving their intended purpose.

CBMs have been used as part of infrastructure and commercial development across the United States for several decades, but there has been growing interest in recent years in expanding and improving the implementation of CBMs as renewable energy deployment has increased and there has been greater acknowledgement of community needs and experiences in the energy transition. Diverse stakeholder groups—like governments, community groups, nonprofit organizations, energy developers, and researchers—are engaging in work focused on understanding and elevating the role of CBMs in supporting equitable, community-supported energy development.

With this diverse and growing body of work on CBMs—and the lack of a universal understanding of them—there is an opportunity for coordinated leadership that ensures efforts are aligned and strategic, creates a clear path for collaborations, and incorporates diverse perspectives into strategy on community benefits. This workshop was an initial step toward identifying and addressing these needs and priorities.

1.1 Objectives and Outcomes

1.1.1 Objectives

The workshop aimed to assess the current state of knowledge, tools, practices, and lessons learned related to the use of CBMs in the development and operation of renewable energy infrastructure. It also aimed to identify research and other work needed to improve the impact and effective design and implementation of CBMs. Specific objectives included:

- Validating key terms, frameworks, and mechanisms
- Assessing the state of knowledge, tools, and resources available
- Identifying different stakeholder perspectives on outstanding needs and gaps
- Laying groundwork for future collaboration and investment in this topic.

1.1.2 Guiding Questions and Challenges

During the development of the workshop, the planning team (comprising staff from the National Renewable Energy Laboratory [NREL] and the U.S. Department of Energy [DOE] as well as a

² “Community benefit mechanism” is a new term introduced by the workshop organizers as a broad, catch-all term that can encompass the diverse array of mechanisms and structures with which participants are familiar.

³ It should be noted that this workshop did not focus on Community Benefits Plans, which are a specific requirement attached to nearly all Bipartisan Infrastructure Law and Inflation Reduction Act funding from the U.S. Department of Energy. Given that the Community Benefits Plan is a concept with clearly defined meaning and procedures, it was a lower priority for the coordination and strategy objectives of this workshop.

professional meeting facilitator) identified key challenges and questions that informed the design of the workshop’s activities and exercises:

- What is the current state of knowledge regarding best practices, equity principles, engagement approaches, and strategies for information sharing and education?
- How do engagement or negotiation practices, CBM elements, and impacts vary based on the type of energy technology, region, and community characteristics? How may they evolve over time?
- How can existing practices be evaluated? Are there novel practices for future development and evaluation?
- What interest is there in standardizing CBM approaches and centralizing resources?

1.1.3 Desired Outcomes

From this workshop, DOE hoped to lay the foundation for increased clarity, coordination, and alignment among the diverse stakeholders working on CBMs for renewable energy, as well as to identify future roles for DOE and other stakeholders. DOE saw value in building a shared understanding of approaches and needs but also recognized the challenge of having the group agree on or adopt the same practices in its first effort to convene on this topic. However, given the diverse, fast-growing body of work on CBMs, an important outcome was ensuring that CBM-related efforts across energy technologies are aligned, strategic, and not duplicative. Lastly, another desired outcome was creating pathways to collaboration and inclusion of diverse perspectives in national strategy on CBMs.⁴ These priority outcomes are reflected in Figure 1.



Figure 1. Desired outcomes of the workshop.

Figure by Matilda Kreider, NREL

⁴ As this workshop was convened by DOE and NREL, informing national strategy on CBMs was a primary motivation; however, given the diverse group of participants, the workshop also involved discussion of CBM strategy, needs, opportunities, and efforts at the regional, state, Tribal, and local levels.

1.2 Participants

The workshop team sought to convene a diverse group of participants with significant CBM experience across sectors, renewable energy technologies, and regions of the country. Individuals and organizations known to have direct research, practice, or policy experience with the topic were invited by the team, and a network sampling approach was also used, in which some invitees recommended additional participants and/or extended invitations to those in their networks.

To reach the meeting objectives, the workshop was designed to be highly participatory and interactive, thus limiting participation to in-person and venue capacity. Approximately 65 individuals participated in the workshop, including the workshop organizers from DOE and NREL; Figure 2 shows how different sectors were represented. A full list of the organizations represented at the workshop can be found in Appendix B.

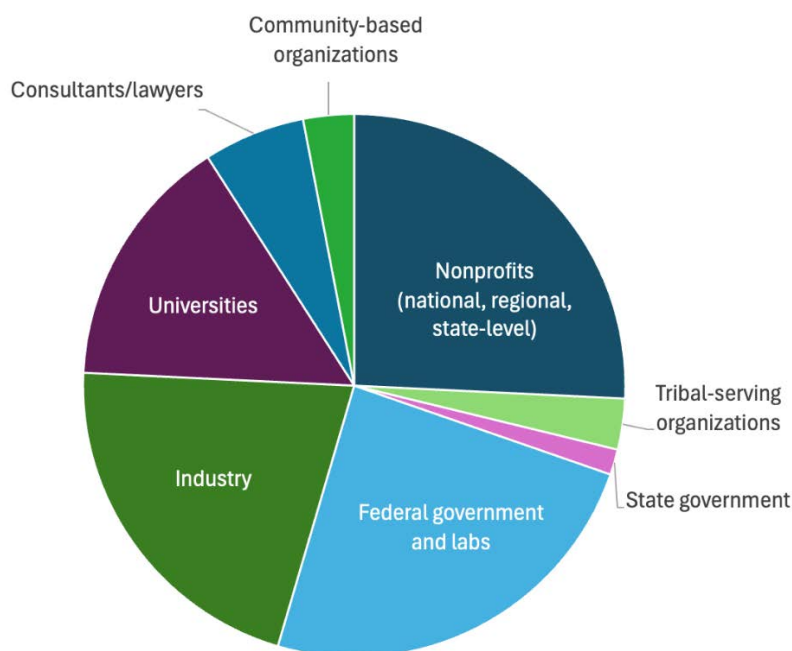


Figure 2. Workshop participants by the sector they represent.

Figure by Matilda Kreider, NREL

Although some participation support (e.g., funding for travel) was made available, the workshop was planned on a limited timeline, and not all participants who were invited were able to participate. At the workshop, participants were asked to identify additional individuals or organizations they believed should be included in additional convenings to support a possible broadening of DOE's engagement on this topic in the future. Additionally, participants were encouraged to bring insights and ideas gleaned from the workshop back to their own communities, organizations, and networks to extend the impact of the convening. The publication of this report helps to support this broader public dissemination of findings from the workshop.

1.3 Structure

The workshop was designed to be interactive, collaborative, and engaging for participants, with a goal of gathering inputs from and exchanging ideas with participants, rather than being oriented around general CBM education or decision-making. Activities were centered around facilitated discussions, small group breakouts, and interactive engagement through written materials in the meeting space. A full agenda with descriptions of the activities and their goals can be found in Appendix A. Pre-workshop and post-workshop surveys were also utilized to solicit feedback from participants on their goals and experiences.

1.4 Introduction to Community Benefit Mechanisms

While the workshop was designed in a manner that recognized the varied experiences and perspectives of participants, it was important to establish a foundation of shared understanding on the topic early in the workshop. The event began with a brief overview of NREL research and engagement efforts on CBMs, followed by a related series of framing questions on the topic, inviting participants to consider, discuss, and contribute their perspectives on these questions over the course of the workshop. The questions were:

- Who is working on or involved in community benefit mechanisms?
- What constitutes a community benefit?
- How are community benefit mechanisms designed and implemented?
- When are community benefit processes carried out?
- Why use community benefit mechanisms?

Taking initial steps toward a shared vocabulary of CBM terms and concepts was an important foundational activity at the workshop. In one exercise, definitions for specific terms such as *community benefit agreement*, *community benefit fund*, *Tribal benefit agreement*, and *tax agreement* were presented for participant feedback. Community benefit mechanism is a new term introduced at the workshop by the DOE and NREL teams as a broad, catch-all term that can encompass the diverse array of mechanisms and structures with which participants were familiar. Participants were asked to use the terminology they preferred but to consider using this new term if they found it useful.

A framework of purposes for using CBMs was also presented, based on NREL research, which is in Table 1. This was meant to underscore the diversity in perspectives and motivations behind the work being conducted on CBMs as well as to encourage participants to think critically and strategically about the role CBMs have in achieving certain goals in the energy transition.

Table 1. A Framework of Purposes for Using Community Benefit Mechanisms

Purpose	Community benefits are meant to...
Social acceptance of proposed projects	<ul style="list-style-type: none">• Increase local support for a project• Obtain siting/permitting approvals
Equity or energy justice	<ul style="list-style-type: none">• Make a project more equitable by maximizing and fairly distributing its benefits• Uplift disadvantaged communities (not only host communities)
Ongoing consent or social license to operate	<ul style="list-style-type: none">• Build and maintain positive long-term relationships between a community and developer• Ensure ongoing support from the community
Impact compensation	<ul style="list-style-type: none">• Compensate monetarily for impacts that could not be sufficiently minimized or avoided
Recognition	<ul style="list-style-type: none">• Recognize a community as hosts of the project

2 Themes From Workshop Discussions

In this section, insights and perspectives shared in the workshop are synthesized into broader themes. The methodology for thematic analysis is explained, followed by a discussion of the themes; this includes discussing some of the different narratives and perspectives involved in them and describing key workshop discussions related to them.

2.1 Thematic Analysis

Written materials collected during the workshop included typed notes from small group and plenary discussions as well as hand-written responses on note cards, handouts, whiteboards, and posters. The planning team also collected participant responses through pre- and post-workshop surveys.

To report this information succinctly but accurately, NREL used a thematic analysis approach to code qualitative data from the workshop. Individual sentences and phrases were assigned codes based on their meaning, then related codes were organized into themes, which fell into two broad categories: on-the-ground implementation of CBMs and theoretical and strategic elements.⁵

2.2 Implementing Community Benefit Mechanisms on the Ground

Themes in this category are related to applied implementation of CBMs in the communities hosting or proximate to renewable energy infrastructure. Many of the workshop participants were consultants, lawyers, community organizers, community engagement practitioners, developers, and other stakeholders currently or previously involved in CBM engagement and negotiations, as opposed to those just getting introduced to the topic. As a result, much of the discussion at the workshop centered on practical questions and ideas coming from participants' applied experiences with CBMs. Assessing, validating, and building a shared understanding of these practices and approaches were key objectives for the workshop.

One code from the thematic analysis stands out as the overarching question for this category of themes: *Beyond definitions, how do CBMs actually work?*

2.2.1 Engagement Processes

At the core of equitable CBM implementation is inclusive and thoughtful engagement processes, in which different parties engage with the potential community benefit recipient (e.g., local or Tribal government, community groups) to make decisions about CBMs and, in some cases, negotiate. Though often interlaid with the broader engagement processes for the development and siting for the project, CBM processes have priorities, steps, and outcomes that are distinct. At the workshop, participants discussed issues, considerations, and strategies, including:

- Barriers and challenges for communities engaging in CBM processes, such as:
 - Lack of capacity and related resources (like time, money, staff, and expertise) can be a major challenge for local governments and community groups who may have limited or no familiarity with CBMs.

⁵ Though separated into different categories for ease of understanding, there is often overlap between different themes and the ideas involved in them; many subthemes could be included in multiple categories.

- Resources and/or actions needed to support communities within CBM processes, such as:
 - Increasing access to expertise, information, or support from a neutral trusted party (e.g., local advisory team, consultants, facilitators, lawyers).
 - Funding for groups who facilitate and support negotiation processes.
 - Direct funding to communities to support their involvement in CBM processes.
- Strategies for:
 - Identifying affected stakeholders and others who should be included in the process and in receiving benefits (which inherently requires determining who should be excluded).
 - Evaluating community needs and priorities (both in general and in the context of a proposed energy development) and identifying how a CBM could be useful in meeting needs and achieving goals.
 - Reaching alignment of stakeholder preferences and priorities for the design and implementation of a CBM.
- Considerations that are specific to CBM engagement with Tribal governments and Tribal entities.
- Importance of trust in and expertise of those supporting the CBM process (e.g., consultants, lawyers, community organizers, bridging organizations).

2.2.2 Power Dynamics and Representation

Power dynamics are an important factor in the processes of negotiating and making decisions about CBMs. There is an inherent difference in power (real or perceived) between potential community benefit recipients and the party providing benefits, but there can also be additional power dynamics that are unique to each situation, such as access to information and/or resources and conflicts or misalignment between stakeholders or groups in a community. These dynamics were a key consideration in workshop discussions about how to make the implementation of CBMs more equitable. Questions and ideas discussed at the workshop included:

- Who should be involved in making decisions about CBMs? How are different stakeholders empowered or disempowered from being involved?
 - For example, to what extent should local governing bodies (e.g., county or municipal governments) be involved?
- Who should receive benefits from a CBM?
- Power imbalances or other dynamics between stakeholders involved in the CBM decision-making, negotiation, and implementation processes, for example:
 - The developer may have resources (e.g., money, time, legal and technical expertise, knowledge of the project) that other parties do not have.
 - Having authority over project siting and permitting may give a local or Tribal government leverage in CBM negotiations.

- Internal community dynamics (e.g., groups or individuals with significant influence or power, distrust of local government, conflicts between stakeholders).
- Coalition-building as a strategy to increase the power of community groups and help align different stakeholder preferences for design and implementation of a CBM.
- CBMs as a tool to support the agency, self-determination, and goals of those receiving benefits.

2.2.3 *Developer-Community Relationship*

Community benefit mechanisms link communities and energy developers together, whether through a binding agreement or a more informal donor-recipient relationship, which can have rippling effects for the outcomes of the project. Participants discussed considerations like:

- Trust (or lack thereof) between community and developer:
 - How does the level of trust impact the negotiation and implementation of a CBM?
 - Can CBMs be a tool to build trust?
- Developers and communities are not monolithic; developers vary in their approaches to CBMs and relationship-building with communities, and vice versa.
- What are the developer's motivations for providing community benefits? How are these motivations communicated to and understood by the community?
 - For example, in the absence of a positive developer-community relationship and transparent communication, the community may perceive that the developer is trying to bribe them or buy their support for the project with a CBM.
- History of harm or neglect to communities from some past energy developments.

2.2.4 *Timing and Longevity*

The timing of when CBMs are announced, decided, and implemented can have implications for both the community and the project/developer. Questions and ideas discussed included:

- What is the right timing for various aspects of the CBM process? For example:
 - When in the project development process should CBM engagement and decision-making processes begin?
 - When should the distribution of benefits begin, and, if ongoing, at what intervals should benefits be distributed (e.g., quarterly, yearly)?
- Timing issues and their consequences, for example:
 - A mismatch between when a community prefers to receive benefits and when the developer is willing or able to provide them could cause conflict.
 - Beginning CBM negotiations very early in the project development process could be problematic if the project does not end up being developed.
- Trade-offs between one-time and ongoing benefits (e.g., one-time benefits require less attention to enforcement, but ongoing benefits might have more meaningful impact).
- CBMs as a tool for long-term engagement and relationship building.

2.2.5 Accountability

After decisions are made and CBMs are implemented, ongoing work may be needed to ensure that commitments are upheld and their impact is measured. Accountability is an important part of building trust and ensuring CBMs produce the desired outcomes for communities. Participants discussed strategies and approaches for:

- Transparency about key aspects of the CBM process, such as contents of the CBM, how decisions were made, who is involved in the process, stakeholder preferences and motivations, and progress and follow-through on implementation of CBM.
 - Challenges like limitations in what some stakeholders are willing or able to share, legal aspects of sharing data and proprietary information, lack of trust, and inequity in the information different parties have in negotiations.
- Challenges involved in ensuring follow-through on commitments over extended timelines, for example:
 - Enforcement can be costly, requiring resources (e.g., money, time, legal support) that communities may lack.
 - After project is built, communication pathways between developer and community may erode.
 - Project ownership may change, which could bring uncertainty about the status of benefit commitments.
- How different CBM structure or design choices pertain to enforcement and accountability:
 - For example, the potential for building monitoring and enforcement provisions into a CBM, like by including specific and measurable outcomes in agreement language, could differ depending on the type of mechanism.
- How to track, measure, and evaluate impact.
- Oversight from community (e.g., community advisory board).

2.2.6 Scale and Feasibility

Designing a CBM requires decisions about how large it should be—in terms of value (monetary or nonmonetary), the stakeholders included, or the issues it tries to address—and what is feasible for a specific project and context. Some ideas discussed at the workshop were:

- Scale of investment (both in terms of amount of money and geographic scale).
- What are developers likely or able to provide in the community benefits context?
 - For example, what amount of money is feasible to expect? How does having or not having this information shape CBM negotiations?
- How should the cost of a CBM relate to the overall project cost, scale, or anticipated amount of electric generation or revenue?

2.3 Theoretical and Strategic Elements of Community Benefit Mechanisms

Themes in this category pertain to bigger-picture questions and issues, such as the theoretical underpinnings for the use of CBMs and the coordination, strategy, and high-level decision-making needed to ensure effective, efficient work is done at all levels. These topics were relevant to all stakeholder groups present at the workshop, but they were of particular importance to those who are approaching CBMs from the perspectives of research, funding, program development, strategy, and governance. Taking initial steps toward a clear, coordinated, aligned, and strategic approach to CBMs was a priority and overarching outcome for the workshop.

2.3.1 Defining and Delineating Community Benefits

A significant point of misalignment and inconsistency is the definition of what constitutes community benefits and what is considered separate or insufficient to be included in that definition. Several activities in the workshop focused on the meaning of “community benefits” and varying definitions of related terms and concepts, but it was challenging to reach agreement given the diverse perspectives involved. Some of the ideas and questions discussed included:

- What constitutes or counts as part of the community benefits concept? What does not count, and why?
 - These questions apply to various key considerations, like the structure/mechanism used, the types of benefits/elements included, and the stakeholders involved. For example:
 - Some participants believed only certain structures—particularly formal, legally binding agreements like CBAs—should be considered part of this concept, while others were open to considering other structures.
 - Some participants thought that benefits should be related to certain established tenets or issues (e.g., labor, equity), while others believed that “community benefits” can refer to any benefits the community desires.
- How important is it to agree on definitions?
 - Some participants expressed a desire for a more streamlined, simplistic, and standardized definition while others thought flexibility in definitions and forms/structures can be useful.
- Where do terms and definitions come from, and who is involved in shaping them? What terms would community members or other stakeholders use to describe community benefits concepts?
- Consideration of the historical context, meaning, and use of CBMs (particularly CBAs), including how they are used in other industries.
- How should workforce and labor considerations be included in the community benefits concept?
 - For example, workforce development and labor commitments have historically been central features of CBAs in other sectors, but in the renewable energy sector,

it is more common to see separate labor-specific arrangements like project labor agreements.

2.3.2 Purpose and High-Level Impact

An underlying theoretical question presented at the workshop was the question of what purpose CBMs are meant to serve; for example, is the reason for providing community benefits to increase community acceptance of a project, or is it to make energy development more equitable? A follow-up question might be how effective different CBM structures and approaches are at achieving these different purposes. Some themes from the workshop included:

- What is the purpose of providing community benefits (e.g., ensuring community support for a project, supporting energy justice, helping communities reach their goals, compensating for impacts, meeting a requirement)?
- Evaluating impact at a high-level; in other words, how do you know that a CBM was successful at achieving the intended purpose?
- What do communities think of CBMs?
 - What impact do CBMs have on community perceptions of a project or developer, and what impact do they have on the project's outcomes?
 - Risk of CBMs (or certain CBM structures or approaches) being perceived negatively by the community, with cascading effects.
- What are communities expected to give or agree to in exchange for receiving or signing onto a CBM?

2.3.3 Requirements and Standardization

In discussions of strategy for expanding and improving the implementation of CBMs, a common consideration is the idea of standardizing and/or requiring them. Some policies and incentive structures to this end are in place at the federal, state, and local levels, but given the decentralized regulation of most renewable technologies, it is challenging to have a singular approach. Some questions and ideas discussed were:

- Should there be standardized or aligned approaches to CBMs across geographic and technology contexts?
- How should approaches be evaluated, adjusted, and selected?
- Who could or should institute a requirement or standard?
- How to ensure community perspective is present in standards, for example:
 - Community-endorsed set of best practices for developers to follow.
 - Assessing and setting a baseline of community benefit elements required within a given mechanism, while allowing customization beyond that.
- How does standardization impact or relate to the various aspects of CBM implementation (e.g., decision-making, negotiations, power dynamics)?
- Government incentives in the absence of requirements (e.g., bidding credits in the federal offshore wind energy leasing process).

2.3.4 Ability To Adapt and Change Course

The use of CBMs is a growing and evolving practice, having been long-used in some areas of commercial and industrial development (e.g., stadiums, waste facilities) but only newly applied to many renewable technologies in the United States. Thus, an important area of CBM strategy is identifying areas where adaptation and flexibility could be necessary or useful. Some ideas discussed at the workshop were:

- Approaching CBMs at a broader scale beyond or upstream of individual energy projects.
- Community benefits as an opportunity to do energy development differently:
 - Making communities central figures with greater influence over decision-making.
 - Approaching energy development through the community benefits lens can inspire creativity and innovation; for example:
 - Coupling utility-scale energy developments with community energy projects, when aligned with the host community’s needs and priorities.
- What differences should be considered when applying CBMs to different renewable technologies? To different regions and community contexts?
- Flexibility in definitions and approaches.
- Openness to utilizing other mechanisms besides the traditional CBA; for example:
 - Directing more attention to community ownership models.

2.3.5 Coordination and Strategy

A significant desired outcome for the workshop was to make progress toward a clear, coordinated, aligned, and strategic approach to CBMs. Much of the workshop was designed to inform possible collaborations, resource development, and funding of CBM-related efforts and initiatives. Some ideas, questions, and needs identified in these discussions were:

- Development and dissemination of guidance and resources for different stakeholders involved in CBMs.
- Transparency and accessibility of data and guidance:
 - Need for more information and awareness about the work being done.
 - Challenges in achieving transparency (e.g., communities or developers may not want all information about a CBM to be publicly available).
 - Ensuring under-resourced communities have access to information and guidance.
- Who is best placed to carry out certain community benefits efforts (e.g., engaging with communities, being involved in negotiations)?
 - What should the role of legal counsel be?
- Importance of getting the “right people” and/or equitable representation in the room for CBM strategy discussions and convenings.
- Experimentation and innovation with approaches and processes.
- Need for coordination between entities with authority over CBM implementation (e.g., state government coordination).

- Desire for more frequent convening and collaboration opportunities, including networking and channels for peer exchange between interested parties and practitioners.

3 Conclusion and Potential Next Steps

Through two days of discussion and engagement with a diverse, experienced group of participants, this workshop highlighted the broad and growing landscape of actors and activities related to the use of CBMs in the U.S. renewable energy sector. By testing frameworks and definitions, and sharing participant experiences and perspectives, the workshop helped to reach greater clarity about relevant concepts and practices. It also laid the foundation for opportunities for increased coordination and/or collaboration between stakeholders and efforts, and a strategy on CBMs that is informed by actors representing diverse sectors, geographies, and types of renewable energy projects. Based on information gathered from the workshop and engagement in other efforts related to CBMs, the NREL and DOE workshop team have identified some potential next steps that might be taken by various stakeholders to expand on the event's outcomes.

Clarity

The workshop invited participants to share their perspectives on concepts and terms, discuss their experiences with practices and approaches, and identify needs and gaps. Though the workshop did not seek to reach consensus among participants in this initial engagement, it was successful in building a shared understanding and assessing the state of knowledge across stakeholder groups and topics represented at the event. Next steps could include:

- Further investigation and evaluation of concepts, terms, and practices with a larger group of engaged parties through methods such as conducting surveys or having workshop participants use this report to solicit feedback on concepts discussed at the workshop with their networks.
- Conducting research on topics that require further clarity, to fill knowledge gaps and support increased understanding of contested issues.
- Increasing clarity of CBM concepts and processes among stakeholders—particularly those central to the implementation of CBMs, such as developers and communities—by producing guidance or informational resources or by funding trusted entities to facilitate direct engagement, capacity building, and peer exchange on the topic.

Coordination

The workshop raised awareness of the diversity of thought and array of efforts being carried out related to CBMs, and in some cases it laid the groundwork for increased alignment and coordination between these perspectives and efforts. Participants engaged with the ideas shared by others, highlighted their projects and efforts for other participants' awareness, and identified ways they could support or leverage others' work. Next steps could include:

- Developing ongoing hubs for those working in the CBM field that would facilitate coordination and reduce duplication of efforts. For example:
- A resource hub containing research, guidance, technical expertise, and other information about CBMs.
- A community of practice for researchers, practitioners, and other stakeholders working on CBMs.

- Creating streamlined pathways for those seeking support in CBM processes (e.g., local governments, community groups) to be matched with organizations that can facilitate and support processes, such as a CBM-specific technical assistance program.
- Expanding the network of stakeholders involved in this effort to include those who couldn't participate in the workshop and/or those identified by participants as having important perspectives and knowledge.

Collaboration

The workshop facilitated connections between participants from different regions and stakeholder groups and provided opportunities for participants to develop ideas for future collaborations. Next steps could include:

- Participants reaching out to each other to initiate collaborative projects, communities of practice, or other partnerships.
- Creating co-production or matchmaking pathways for stakeholders working on CBMs through different disciplines/approaches and/or in different contexts. For example:
- Bringing researchers and engagement practitioners together to collaborate on interdisciplinary CBM work (e.g., community-engaged research efforts).
- Matching communities, local governments, or Tribes involved in CBM processes with facilitators, lawyers, or other support or expertise.
- Planning additional workshops and meetings, hosted by convening organizations (e.g., nonprofits, industry groups, other federal agencies or national labs) to further expand knowledge and action on this topic.
- Exploring opportunities to collaborate with and learn from international stakeholders (e.g., researchers, governmental bodies, developers) with experience with CBMs, to better understand approaches used in other places and broaden understanding and perspectives.

Strategy

Though informing the development of a national strategy on CBMs was the primary impetus for initiating the workshop, the event also offered an opportunity for state, local, Tribal, and regional entities and organizations to discuss and evolve their approach for CBMs. Participants discussed high-level topics such as the purpose and impact of CBMs, and they identified ways that CBMs could be designed and implemented to achieve certain strategic aims. Next steps could include:

- Increasing coordination across the federal agencies involved in renewable energy development to ensure consistent messaging and strategy on CBMs.
- Creating convening opportunities for stakeholder groups to communicate goals and develop strategies for their work on CBMs, like state governments and regulatory bodies convening to discuss state-level CBM policy.
- Piloting new approaches and evaluating their impacts and success, to ensure strategies are flexible and continuously evolving.

Appendix A. Agenda

Table A-1. Agenda of Activities From Day 1 of the Workshop

Day 1	
Opening Remarks and Opportunity to Connect	<ul style="list-style-type: none"> • Members of the planning team from DOE and NREL provided opening remarks on the purpose of the workshop, discussing the main objectives and scope. • Participants were asked to partner with another person to connect and discuss an innovative or unique community benefit approach they've seen in their work.
Current State of CBM Knowledge	<ul style="list-style-type: none"> • A member of the organizing team from NREL presented background information on CBMs, including the work that has been done by different entities and how that body of work informed the development of the workshop. • Goals: to set a group baseline of understanding on CBMs and to provide context for the purpose of the workshop.
Validating Key Terms, Frameworks, Mechanisms	<ul style="list-style-type: none"> • Participants moved around the room to provide written feedback on different terms/concepts and definitions related to CBMs, including whether they consider the term to be part of the larger CBM concept and how they would change the stated definition. • Goals: to gather insights about what concepts are considered central to this topic, how participants define terms in their contexts, and what the points of disagreement are.
Why CBMs? Purpose and Benefits	<ul style="list-style-type: none"> • Participants joined in pairs to discuss and record their views on the purpose of CBMs, how to evaluate effectiveness, the unique benefits CBMs provide, and any alternatives that may exist. The paired participants then joined with other pairs to broaden the discussion on the same topic. • Goals: to prompt a critical discussion of the more theoretical underpinnings of CBMs and to gather opinions about what CBMs intend to do and how successful they are at these aims.
Sharing Lessons Learned and Appreciating Different Approaches	<ul style="list-style-type: none"> • Participants were asked to write down and rate the effectiveness of strategies they have used or witnessed in the following areas of CBM implementation: <ul style="list-style-type: none"> ○ Education/outreach ○ Identifying community priorities ○ Identifying affected stakeholders ○ Coalition-building ○ Negotiation ○ Identifying a CBM model ○ Distributing benefits equitably ○ Monitoring and enforcement. • Participants were next asked to gather in small groups and share stories about their experiences with different CBM strategies, followed by a larger group discussion intended to connect these stories and lessons learned to each other.

- Goals: to gather insights from participants' on-the-ground experiences with CBMs, to assess what lessons have been learned, and to help participants gain awareness of the work being done by their peers.

Leveraging the Group's Wisdom to Address Needs

- Participants were given note cards and asked to respond to:
 - If you were 10 times bolder, what big idea would you recommend to a meet a need or gap in CBM effectiveness?
 - What first step would you take to get started?
 - Then, participants exchanged cards with each other several times and scored the ideas based on how much they would prioritize them. Based on the aggregate scores for each idea, the top 10 ideas were chosen; small groups were formed around each idea to discuss how it could be further developed and implemented.
 - Goals: to help participants leverage others' ideas and experiences to solve their own issues and to encourage an innovative, action-oriented mindset when faced with outstanding needs and gaps.
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Table A-2. Agenda of Activities From Day 2 of the Workshop

Day 2	
Helping Each Other Meet Critical Needs	<ul style="list-style-type: none"> • Participants gathered in groups based on their sector (e.g., industry, community-based organizations), discussed what support they need to improve their CBM work, and recorded these needs using an online platform. • Using the online platform, the sector groups then examined the needs listed by other groups and added the ideas, resources, and solutions they could use to address those groups' needs. • Goals: to bridge the divides between different sectors and to identify pathways to meeting the needs of other sectors.
Participant-Led Brainstorming and Problem-Solving	<ul style="list-style-type: none"> • Participants volunteered to lead a small group discussion and brainstorming session on a topic that they propose, whether that is a challenge coming from their own work or a new idea they are trying to develop. • Goals: to give participants the opportunity to raise issues or topics that were not covered in the workshop design while gaining problem-solving support, new ideas, and feedback from their peers.
Opportunities for More Aligned and Effective Implementation	<ul style="list-style-type: none"> • This activity asked participants to develop and share an idea for how this group can reach more clear alignment on terms and definitions, as well as how to disseminate and validate these terms with communities and other stakeholders not in the room. • Lack of agreement and alignment on terminology was identified as an unresolved issue from workshop day 1, so the goals of this activity were to gain additional clarity and to gather ideas/strategies for alignment and coordination.
Laying Groundwork for Future Collaboration	<ul style="list-style-type: none"> • Participants discussed their next steps from this workshop and ideas for future initiatives and convenings.
Closing Reflections	<ul style="list-style-type: none"> • In pairs, participants discussed: <ul style="list-style-type: none"> ○ What issues or questions they still have, or what they still don't understand. ○ What issues or questions they feel are now squared away, or what they now understand. ○ Which takeaways from the workshop they could use in their CBM work.

Appendix B. List of Participating Organizations

Participants in the workshop came from the following organizations (listed alphabetically):

- AES
- Alliance for Tribal Clean Energy
- Allium Energy
- American Clean Power Association
- Apex Clean Energy
- Bantam Communications
- Center for Planning Excellence
- Center for Rural Affairs
- Clean Air Task Force
- Climate Democracy Initiative
- Conservation Law Foundation
- Data for Progress
- DOE Office of Energy Efficiency and Renewable Energy
- DOE Office of Energy Jobs
- DOE Wind Energy Technologies Office
- Energy Futures Initiative Foundation
- Environmental Defense Fund
- Fair Shake Environmental Legal Services
- GridWorks
- Interwest Energy Alliance
- Invenergy
- Jobs to Move America
- Law Office of Julian Gross
- Lawrence Berkeley National Laboratory
- Leeward Renewable Energy
- Longroad Energy
- Michigan Public Service Commission
- Montana State University
- National Renewable Energy Laboratory
- Native Renewables
- New England for Offshore Wind
- Natural Resources Defense Council
- Oregon State University
- Pattern Energy
- Plus Power
- Pacific Northwest National Laboratory
- Princeton University
- Ram Consultancy
- Reimagine Appalachia
- Rocky Mountain Institute

- Rural Organizing
- RWE
- Scout Clean Energy
- Sea Grant
- Siting Clean
- The Wilderness Society
- University of California, Berkeley
- University of Maryland
- University of British Columbia
- University of Delaware
- University of Rhode Island
- University of Wisconsin-Madison
- World Resources Institute