Engagement Plan

Template & Instructions

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The Community Energy Reliability and Resilience Investment (CERRI) Program recipients are required to partner with a California community-based organization (CBO) and/or tribe to inform, educate, and engage community members, spokespeople, and other interested parties on their project goals, progress, and outcomes. Recipients are required to submit an Engagement Plan that outlines the planned engagement activities and summarizes the expected qualitative and quantitative impacts of engagement. Wherever possible, **s**pecific, **m**easurable, **a**chievable, **r**elevant, and **t**imely (SMART) milestones and timelines should be used. Recipients with multiple subprojects in disparate geographical areas should create a single document with subsections for each geographical area as needed. Plans should be no more than 10 pages in length; for recipients with subprojects in multiple geographic areas, plans should not exceed 20 pages.

Recipients must incorporate the CERRI Program's Engagement Best Practices to the fullest extent possible.

I. INTRODUCTION AND BACKGROUND

The Introduction and Background section should be a concise high-level overview of:

- The reliability or resilience problem addressed by the project.
- The project's intended outcomes.
- The community(ies) the project aims to serve.
- An overview of the demographics and other background information on the community(ies) that the project will serve.[1]
- A description of the CBO and/or tribal partner(s) and why they were selected.
- A summary the project's engagement goals.
    - If applicable, how the project aligns with existing Climate Resilience or Adaptation Plans in the community(ies).
- A summary of any engagement activities conducted by the recipient or the recipient's CBO and/or tribal partner(s) prior to groundbreaking of the project and the results of those activities.
    - If applicable, include concerns, feedback, and suggestions from community members, and how their input was used to inform the development of the project.

II. ENGAGEMENT PLAN

This section should outline the planned engagement activities and discuss the role of and/or coordination with a CBO and/or tribal organization partner(s). All activities must align with the Scope of Work (Attachment 03) and the anticipated project metrics detailed in the Project Metrics

[1] When possible, please use US Census data to determine demographic information. Community census data may be accessed at: https://data.census.gov/.

spreadsheet (Attachment 09). This section should include details that may not be in other documents such as planned meeting frequency, key contacts, etc.

The following information is required.

Target Audience:

- Describe the target audience(s) of the engagement activities (e.g., priority communities, residents living near the proposed project).

Key Spokespeople:

- Identify key community spokespeople (e.g., faith-based leaders, business owners, elected officials) and their significance within the target audience.

Planned Engagement Activities:

- Describe planned methods and activities to engage target audience(s). Include the number of planned events, estimated number of participants, dates and locations (even if tentative), budget allocation, and the role of the CBO(s) and/or tribal partner(s). Examples of engagement activities include:
    - Holding public workshops or focus groups (in-person and/or virtual) to provide project information.
    - Speaking with spokespeople such as community leaders or organizations.
    - Conducting surveys that create opportunities for feedback.
- Outline channels, platforms, languages, materials, and methods that will inform and educate target audience(s) in a manner that considers their priorities and concerns.
    - Examples of communication materials include brochures, fact sheets, newsletters, social media, etc. Other suggestions include:
        - Utilizing social media to provide project updates and/or information about events/meetings.
        - Mailing educational pamphlets to residents in languages accessible to local communities.

Support Services:

- Describe intended efforts to provide services to promote access to engagement activities (e.g., hiring a translator for engagement events, providing childcare for meetings, providing reimbursement for transportation to/from events, etc.).
    - Include the estimated budget for support services. **Please note, these expenses are not eligible for CERRI Program funding and must be covered by match funds.**

Engagement Tracking and Reporting:

- Detail methods that will be used to track and report on the effectiveness of the engagement plans.
    - This should include regular updates on project milestones, engagement efforts, and feedback mechanisms.

III. BENEFITS AND IMPACTS

This section should describe the anticipated cumulative benefits and impacts to the community(ies) that the project intends to serve. The benefits and impacts should be reported through both qualitative and quantitative methods and include the below information.

Benefits Summary:

- State the expected energy reliability, resilience, and/or community benefits of the project (e.g., increased access to critical services, reduced outage frequency and duration, etc.).
- Summarize the anticipated benefits specifically tailored to priority communities.[2]
- List any additional benefits, such as energy and water savings, decreased fire risk, or decreased heat risk, provided by the project.

Benefits and Impacts Tracking and Reporting:

- Summarize baseline data provided in the Project Metrics (Attachment 09 of the project proposal) prior to project implementation.
- Establish a plan for quantitative and qualitative data collection, detailing method(s) and frequency.
    - Identify quantitative indicators, such as number of outages, outage recovery cost, and outage duration. Data should include all metrics reported in the Project Metrics (Attachment 09).
    - Identify qualitative indicators such as survey results on community satisfaction or quality of life.
    - Reference any important sources used to identify methods and indicators.
    - If applicable:
        - Estimate the expected energy bill savings for customers (broken out by project total and priority communities).
        - Estimate the number of customers expected to be able to access clean energy technology (broken out by project total and priority communities).
        - Estimate the expected tons of avoided air pollutants (oxides of nitrogen, sulfur dioxide, and/or particulate matter 2.5).

IV. EMERGENCY PREPAREDNESS (OPTIONAL)

To support meaningful engagement, Recipients may conduct emergency preparedness activities in project communities in addition to traditional project engagement activities. This could include, but is not limited to:

- Hosting an emergency preparedness workshop on successfully preparing for, riding out, and recovering from an outage.
- Organizing a fund drive to donate emergency preparedness items (blankets, batteries, flashlights, nonperishables, etc.).

[2] Priority Communities consist of low-income communities, California Native American Tribe (tribe) territories, and disadvantaged communities (DACs) as determined by the California Climate Investment Priority Populations 2023 tool. The Priority Populations tool can be accessed at: https://gis.carb.arb.ca.gov/portal/apps/experiencebuilder/experience/?id=6b4b15f8c6514733972cabdda3108348

- Creating publicly available emergency preparedness resources and distributing it to appropriate parties in the community, posting it on social media, providing physical copies in public spaces, etc.

Emergency Preparedness Tracking and Reporting:

- Detail methods that will be used to track and report on the effectiveness of the emergency preparedness efforts in the community. This could include the following:
    - Number of attendees at an emergency preparedness workshop.
    - Dollar amount raised or number of items donated in a community fund drive.
    - Number of resources developed.

V. ENGAGEMENT BEST PRACTICES

This section is designed to aid recipients in their development of an effective and thoughtful Engagement Plan that considers the priorities and concerns of the impacted communities. These best practices will help recipients conduct meaningful engagement and incorporate feedback from community members into their project. Recipients should incorporate the best practices into the Engagement Plan to the best of their ability.[3]

Identifying and Partnering with Community Benefits Organizations (CBOs)

Recipients are required to partner with at least one CBO and/or tribe to help ensure that the benefits of clean, safe, affordable, and reliable energy are shared by all. Please visit the "Project Requirements" section of the most recent CERRI solicitation manual for a comprehensive list of criteria that qualify an entity as a CBO.

- When identifying a potential CBO project partner, recipients should consider the following:
    - Start by exploring existing networks and inquire with known CBOs about additional connections they may have.
    - Collaborate with organizations that have established respect within various communities, such as chambers of commerce or faith-based groups.
    - Partner with CBOs that can engage with communities that might otherwise be difficult to reach.
    - Avoid focusing solely on larger CBOs; instead, seek partnerships with smaller, more local organizations.
- CBOs often face significant workloads, so it is important to be considerate of their time. Schedule meetings at times and locations convenient for CBO employees, including outside of regular business hours if necessary, as many nonprofit workers have full-time jobs in addition

[3] The best practices are compiled from conversations on energy equity facilitated by the Clean Energy States Alliance (CESA) and the 2024 "IRA, BIL, and the Future of Energy: A Summit to Support State Implementation" CESA conference. For more information on best practices, see "Expert Insights on Best Practices for Community Benefits Agreements". Matthew Eisenson & Romany M. Webb, Expert Insights on Best Practices for Community Benefits Agreements, Sabin Center for Climate Change Law, Columbia Law School, Sept. 2023. Available at: https://scholarship.law.columbia.edu/sabin_climate_change/206.

to their CBO roles. Emphasize that CBO employees will be compensated for their time through the CERRI Program.
- Consider coordinating with other recipients and/or governmental agencies to consolidate requests to overloaded CBOs.

Partnering with Tribes[4]

- Understand the history and context of the tribe(s) with which the recipient will be partnering. Take the time to learn about all tribes in the project's geographic area; tribes have different languages, cultures, and perspectives.[5]
- Tribal leadership structures and engagement protocols can vary. Determine the decision-making authority within the tribe, whether it is a governing body or an individual, and understand their preferences for partnership.
- Recognize barriers to participation and clearly communicate that partnering tribes will be compensated through the CERRI Program. Ensure meetings are accessible and keep in mind the volume of requests that a tribe may receive for partnerships.
- Refrain from speaking on behalf of tribes. Recognize that tribes are sovereign nations with their own governments and constituencies.

Respectful Engagement

- Approach engagement with an open mind and moderate any preconceived notions about the intended community(ies). Recipients should engage without bias regarding the community or any potential feedback from its members.
- Remember that engagement must be clear, respectful, and consider the priorities and concerns of community members. The following are suggestions for making outreach accessible:
  - If the intended community(ies) are host to non-English speakers, consider providing:
    - Outreach materials in additional languages common in the area.
    - Language services during community meetings.
  - In outreach materials and engagement sessions, ensure transparency in the funding process by clearly delineating which policies or aspects of the project the recipient has the authority to change and which they do not.
  - Develop outreach materials that are straightforward, clear, and accessible. Minimize overly technical language and incorporate more graphics to enhance visual appeal for a general audience.
  - Ensure engagement events are accessible for community members with disabilities, such as hosting events in Americans with Disabilities Act-accessible buildings or using sign language interpreters in meetings.

[4] The tribal partnership best practices are taken from the following source: "Best Practices for Tribal Engagement". 2023. San Francisco Estuary Wetlands Regional Monitoring Program. https://www.wrmp.org/wp-content/uploads/2023/06/WRMP_Tribal-Engagement-Best-Practices_20230524.pdf.
[5] For more information, please visit the California Truth and Healing Council Resources site: https://tribalaffairs.ca.gov/cthc/resources/.

- Communities are frequently inundated with outreach initiatives, and community members often lack the time to participate in engagement events. If feasible, consider compensating community members for their time and input during these events, offering benefits such as childcare or transportation reimbursement. **Please note that these expenses are ineligible for CERRI Program funding and must be covered by match funds.**
- Before setting a date and location for an engagement event, first ask for input on when and where outreach should occur. Be cognizant of community members time or resources to participate in long or highly involved events.
- Ensure input is incorporated into the project wherever feasible and clearly demonstrate to the that the recipient is receptive to their input. Take steps to update the community on the recipient's efforts to incorporate feedback, through social media, pamphlets, events, or other avenues of outreach.
  - For each piece of feedback, summarize in a publicly available document either how it was incorporated into the project or why it wasn't incorporated into the project. This document should be included as an Appendices in the Engagement Report under "Public Feedback Document".
- Prior to engaging directly with a community, establish rapport by meeting with key spokespeople (e.g., community leaders, NGO representatives, faith-based leaders, and chamber of commerce officials). Offer examples of relevant energy infrastructure projects if applicable and prioritize transparency throughout the engagement process. Allow time for trust to develop.
- Consider coordinating with other state and federal agencies to seek input from the community. Recognize that communities may be overwhelmed by various governmental agencies and funding opportunities and aim for coordinated efforts to streamline communication and engagement processes.
- Consider encouraging spokespeople and community members to form a Community Advisory Board (CAB), which aims to ensure recipient accountability and community participation. CABs can pinpoint community benefit priorities, advise recipients on trustworthy local contractors and union representatives, and create a cohesive community voice, among many other benefits.