Effective Community Engagement Checklist

5 steps for utilities to foster authentic community engagement in the clean energy transition

1. **Identify historically underserved communities**
   a. Reference quantitative resources provided by advocates, nonprofit organizations, and state agencies to identify community-level burdens.
      i. **For consideration:** *What resources, tools, and/or resources are available for identifying communities of interest?*
   b. Speak directly to community members or community advocates to understand burdens at the household level.
      i. **For consideration:** *What [disadvantaged communities] do you think exist in your communities or region? What are some challenges that you think this population faces?*
   c. Ensure that the criteria used to define these communities are measurable and accessible so that utilities can track progress.

2. **Invite community members to inform decisions and offer resources to support their participation**
   a. To encourage participation:
      i. Let prospective attendees know who else was invited
      ii. Describe their expected role
   b. To determine which resources will support participation:
      i. Consider the value of a participant's time and the trade-offs they are making to participate
      ii. Account for the resources they may need to access materials and attend meetings
      iii. Offer resources to all participants and create an easy application for those who need it
      iv. **For consideration:** *What might you need to support your participation in this group?*

3. **Design accessible processes to gather input**
   a. Invite community members to share their needs.
      i. **For consideration:** *What outreach methods have been most effective in reaching your communities?*
   b. Partner with trusted advisors, community leaders, and early program adopters.
   c. Develop materials that respond to the needs of the communities.
   d. Encourage partners to share their experience and communicate with their communities.
   e. Support communities' understanding with educational materials that are culturally and linguistically relevant to them.

4. **Partner with community members and organizations to design and deliver programs**
   a. Leverage community relationships to identify potential partners.
      i. **For consideration:** *Do you have ideas for additional partnership opportunities for this work?*
   b. Design programs and define success with the communities involved.
      i. **For consideration:** *What could success for [program] look like for communities in need? What barriers to success are there?*
   c. Share and replicate successes to build trust.

5. **Track and document progress**
   a. Identify and gather the data resources you have available.
   b. Consider which gaps in data may need to be filled for success.
   c. Partner with community groups and businesses to share data and metrics.
   d. Consider sharing resources and benchmarking with peer utilities.