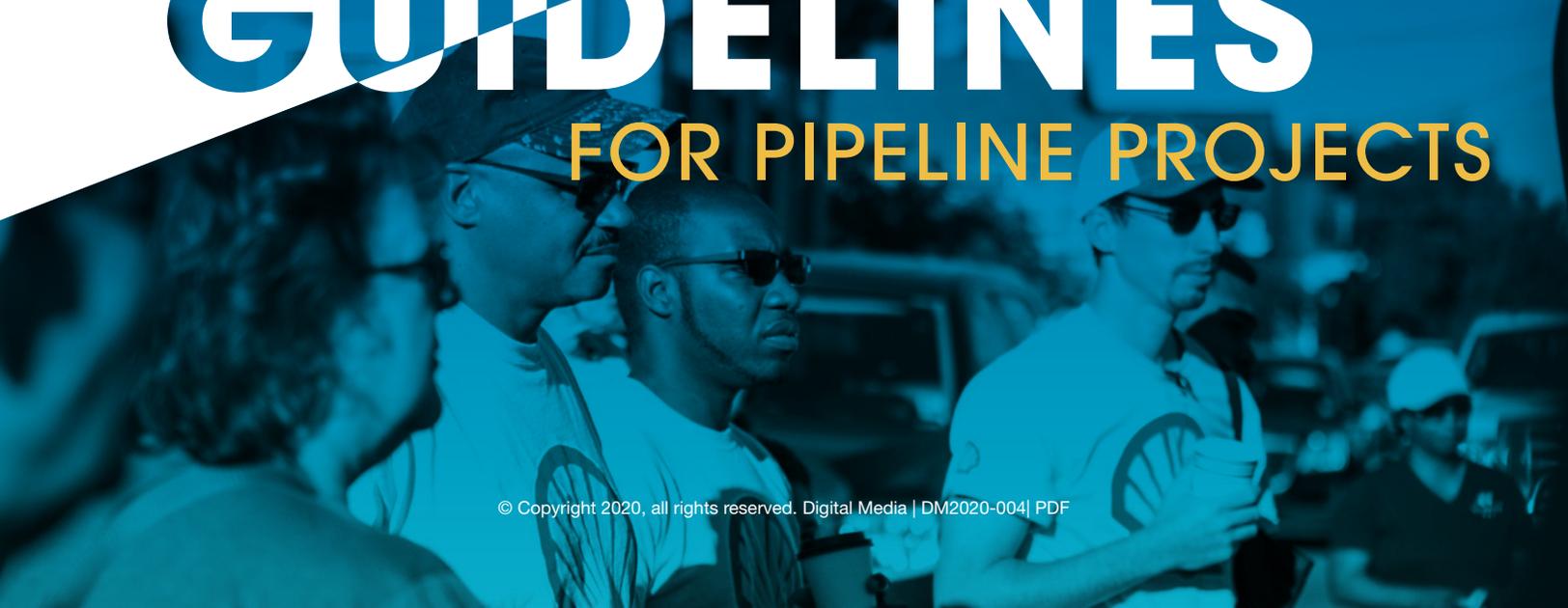




# COMMUNITY ENGAGEMENT GUIDELINES

FOR PIPELINE PROJECTS





# WELCOME

“

Building support for projects within local communities requires well-developed, strategically executed community outreach plans—plans driven by local voices.

”

To support and provide a common industry-accepted approach to community engagement, API has compiled numerous pre-construction best practices that pipeline operating companies might consider in their interaction with communities and stakeholders. This document is an accumulation of efforts currently undertaken throughout the natural gas and oil pipeline industry to proactively engage with communities during the project development process. This document aims to ensure that safe and responsible transportation of the nation's natural gas and oil resources is done hand-in-hand with community and stakeholder input.

In order to promote natural gas and oil infrastructure development that results in [a positive and beneficial experience for communities](#), recommended development activities can align with community concerns and priorities, grounded in responsible practices and lessons learned from past experiences. The industry's commitment to being a good neighbor throughout a pipeline project requires ongoing dialogue with local communities and other key stakeholders. Stakeholders, for use of the Community Engagement Guidelines, are defined as:

**Any person, group or entity impacted by or have the ability to impact an organization and its activities is considered a stakeholder. Stakeholders can affect or be affected by the organization's actions, objectives and policies.<sup>1</sup>**

Fostering broad stakeholder engagement through every phase of a pipeline project, from concept development, through [design](#), [construction](#), and during [operations](#), has become standard industry practice. Operators can explain their plans and activities in a reasonable timeframe to community stakeholders. Then, operators may seek to identify, understand, listen, and respond to issues and concerns. Identifying and engaging stakeholders at the correct time and in an appropriate way allows for two-way communication, while involving stakeholders in identifying and managing potential community impacts helps establish trust and build mutually beneficial relationships. While a balanced resolution between industry and stakeholders remains ideal, some issues can present unique challenges. An overarching goal of any project is to build and maintain a long-term positive relationship between operators and communities.

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<sup>1</sup> Adapted from International Finance Corporation, World Bank Group, Stakeholder Engagement: A Good Practice Handbook for Companies Doing Business in Emerging Markets, first printing 2007.



# ROBIN RORICK

Vice President of  
Midstream and  
Industry Operations

## Message from Robin Rorick

The natural gas and oil industry is committed to serving as economic and environmental stewards in communities across America, safely delivering essential fuels to power our everyday lives. The U.S. relies on an extensive network of energy infrastructure, and ongoing investment in pipeline projects remains critical to meeting our nation's long-term need for affordable and reliable fuels.

As the industry expands natural gas and oil infrastructure, it is incumbent on pipeline operators to establish local relationships, address performance issues and engage community stakeholders. API's Community Engagement Guidelines for Pipeline Projects provide actionable strategies for identifying interests, issues and concerns. Additionally, this document aids operators in finding agreeable solutions for key U.S. regions and communities.

Understanding public opinion and media landscapes, including the perceived impacts of energy operations, is critical to communicating the value of infrastructure development to businesses, families and individual consumers. Energy assets create opportunities for localized economic growth, and by sharing industry success stories and confronting knowledge gaps, operators can build grassroots support for much-needed infrastructure.

Local validators serve as the strongest advocates for pipeline construction projects, and we highly recommend employing the Plan-Do-Check-Act (PDCA) cycle, outlined within this document, to ensure continual improvement as operators cultivate their stakeholder relationships.

Industry-driven reporting, standards-setting and performance initiatives protect the health and safety of workers, communities and the environment, and these community engagement principles facilitate the partnerships that maintain the natural gas and oil industry's mission. Expanding America's pipeline infrastructure is essential to securing our energy future, and the industry is committed to doing so sustainably and alongside all of our stakeholders.

*Community and employee health and safety are paramount to the pipeline industry. We are continuing to evolve our industry's best practices to engage with communities, safely and responsibly, and we strongly urge all parties involved in community engagement to follow state, local, and CDC guidelines.*



American  
Petroleum  
Institute

# COMMUNITY ENGAGEMENT GUIDELINES

## Purpose of the Community Engagement Document

This guidance document is designed to acknowledge challenges and potential impacts that occur during the construction of a project in a region or community. It provides an outline of what local communities and other key stakeholders could expect from operators. Recognizing that application will vary from operator to operator and community to community, this document allows the development of flexible and adaptable strategies. Many operators already follow similar guidelines and procedures.

Operators recognize that stakeholders within a community can have different interests, issues, and levels of concern, and that operators can have different approaches to addressing the concerns and issues. Some of these interests can directly conflict with one another and working together with stakeholders to seek mutually agreeable solutions forms an important aspect of community engagement.

These guidelines apply to the pre-construction phase of natural gas and oil transmission pipeline projects in the United States. However, some themes could be adapted to other natural gas and oil projects in other countries. These guidelines intend to provide non-prescriptive recommendations to enable operators to satisfy their specific considerations to the best of their ability, given the unique situation of each project or asset, and the company and community involved.

## Conditions of Applicability

This document provides non-technical guidance only, and practices included herein are not applicable in all regions and/or circumstances. This document does not constitute legal advice regarding compliance with legal requirements, contractual obligations, or risk mitigation. It is not intended to be all inclusive. The operator is responsible for determining compliance with applicable legal and regulatory requirements.

## Principles

Natural gas and oil operators acknowledge potential challenges associated with industry activities, and the potential impact these activities may have on local communities. Principles of [respect, integrity, safety and environmental responsibility, openness, and responsiveness to community concerns](#) underpin responsible operations. These core values lay the foundation of any good relationship.

## Respect

Pipeline operators treat landowners and stakeholders with respect because we value relationships within the communities we serve. When working with landowners and stakeholders in project development, pipeline operators can demonstrate respect by listening to questions, understanding concerns and sharing their own perspectives. Considering and respecting others' points of view are critical to establish long-term relationships across the life cycle of the pipeline.

## Integrity

Integrity forms the basis of trust, a foundational element for building relationships. Companies operating with integrity strive to build and maintain positive, constructive, and trusting community relationships throughout the construction and service of the pipeline. Throughout the project, they maintain their presence as leaders in the community with a reputation for forthright engagement on issues important to their stakeholders.

## Safety and Environmental Responsibility

The pipeline industry is committed to [safety and environmental protection](#), with an overarching goal of zero incidents. Companies are committed to safety and the protection of the environment and public using clearly defined policies and practices. The goal is to operate daily in a manner that protects the safety, environment and health of communities, employees, and contractors throughout a project.

## Open, Responsive Communication

Engagement and effective communication with the public forms a core element of an operator's safety management system. Through the engagement process, the operator must thoroughly manage risk and expand its desire to establish genuine public partnerships. When speaking to an individual or group of community members, following basic communication principles can form the foundation for credibility and improved dialogue and understanding. Some suggested communications practices are included in Section 2 of this document.

A photograph of four industrial workers in a dark, metallic environment. They are wearing white hard hats and dark blue work jackets. One worker in the center is holding a white document, and the others are looking at it. The background shows large industrial pipes and machinery.

# WORKBOOK

“ Recognizing the role operators play in relationship building with communities is vital. ”

**Most activities recommended in this Workbook can be completed with minimal risks to the commercial viability of a project. In order to optimize positive outcomes, it is suggested that public and stakeholder engagement begin as early as possible in the process.**

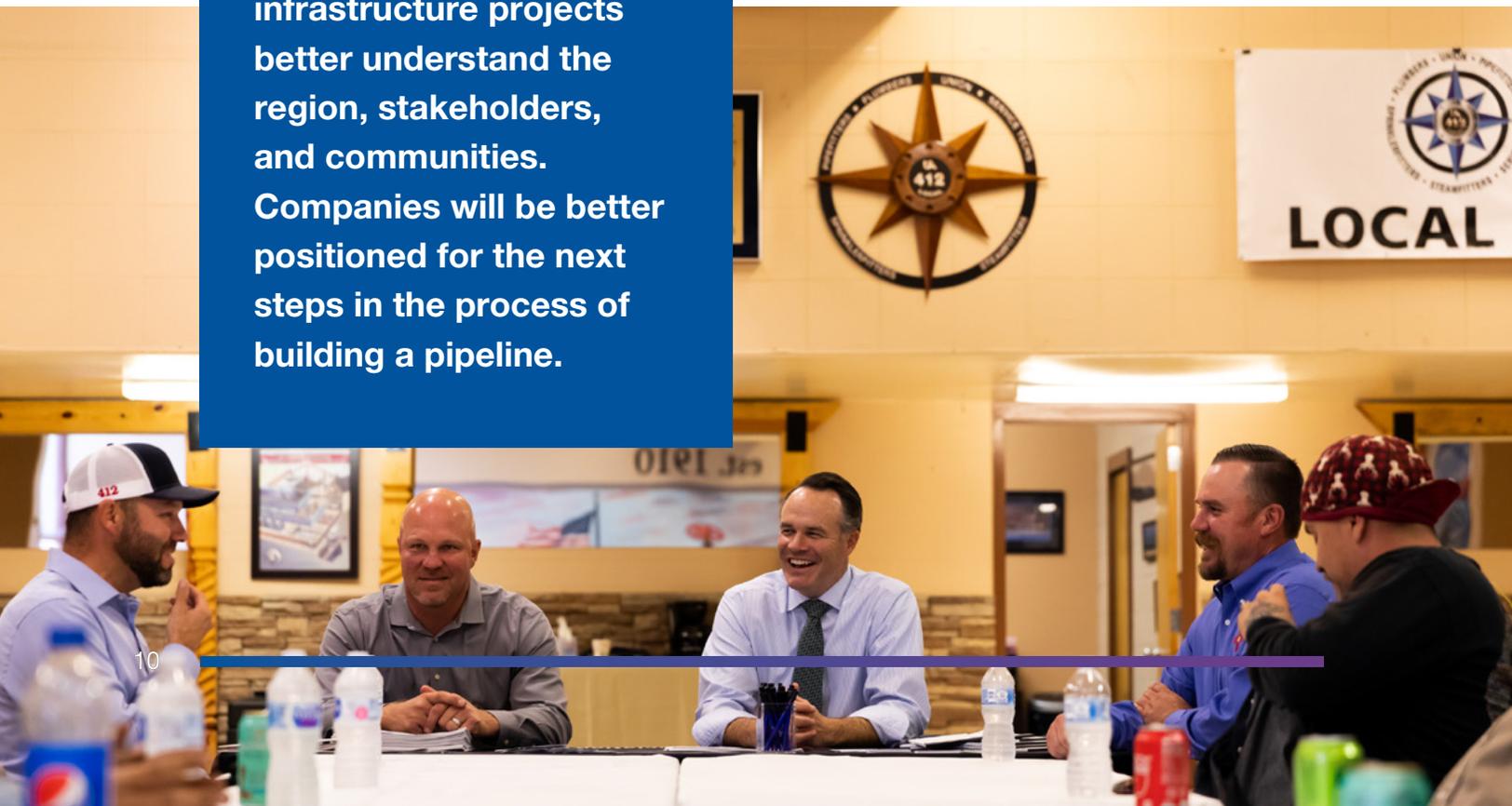
**Accelerating the up-front timeline helps companies that are constructing infrastructure projects better understand the region, stakeholders, and communities. Companies will be better positioned for the next steps in the process of building a pipeline.**

Outreach builds a better understanding and can garner essential support for the natural gas and oil industry and the infrastructure projects we need in the communities where we work and operate.

- Surrounding communities
- Regulatory bodies
- Governments
- Landowners

**This Workbook Provides Suggestions for:**

- Educating communities and stakeholders on local energy infrastructure
- Strategies for proactively and positively engaging with stakeholders with an emphasis on listening to community interests



This workbook is designed to help simplify your decision-making process. Questions are designed to spark strategic thinking and planning. Planning allows companies to be more agile and adaptable in the execution of workflow. As you plan your own program and execution, break up the work into three phases: understand, plan, and engage.



PHASE ONE  
**UNDERSTAND**

Your Community and Stakeholder Assessment will help guide your community engagement planning, as preparation work to understanding the local landscape. Understanding the landscape helps to influence the plan. It is imperative to complete assessments before building the plan.



PHASE TWO  
**PLAN**

Building the Community Engagement Plan and Building Teams involve planning how you engage and work with the local community for the success of the program.



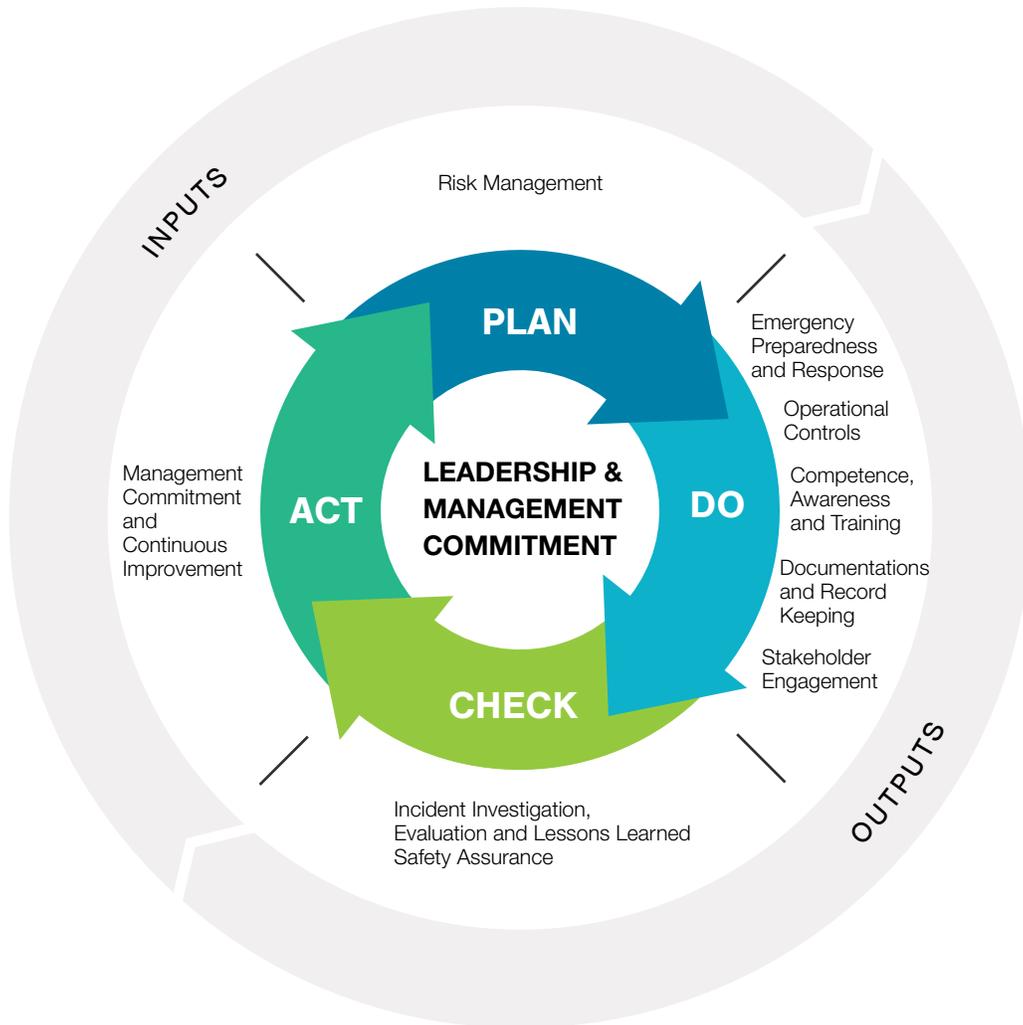
PHASE THREE  
**ENGAGE**

Launching the Plan occurs when the plan is set. It is time to work with supporters, as well as communicate and engage with stakeholders about community concerns and amplify your message.

## PLAN-DO-CHECK-ACT

As with any plan, [the Plan-Do-Check-Act \(PDCA\)](#) cycle is at the core of any management system. PDCA is designed to encourage continuous improvement through an iterative cycle that includes creating of strategies and plans, execution of those strategies and plans in line with guidelines, checking those actions for conformity, and using those results to adjust the next generation of plans. The same holds true for operators developing plans to engage with their communities and stakeholders as part of a pipeline project. Learning from experience and continuous improvement using PDCA are essential.

As this document focuses on pre-construction best practices, it serves as a first step in a life-cycle of engagement between pipeline operators and communities. The three phases listed above (Understand, Plan and Engage) cover much of the “Plan” and “Do” phases, with the “Check” and “Act” phases covered through evaluations and improvements to operators’ engagement programs.



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# PHASE

# 1

## **UNDERSTAND: Community And Stakeholder Assessment**

Conducting your community assessment around the same time as the initial project scoping and planning or the exploratory survey yields the best results. If you are building a pipeline, it is important to conduct this assessment before you send an introductory letter to landowners asking to walk their land. For both natural gas and oil pipelines, the assessment will give you a good sense of the region and community. While you are selecting the corridor for your project, you will have a better idea of the issues your project could face and be better prepared to work through those challenges.

Knowing your community is imperative for an effective community assessment. Take the time to learn about each community where you will operate. Part of this important step is making sure you understand the factors that make up the civic and media landscape. At the heart of your learning is the goal to understand the dynamics of the region, its stakeholders, and how you can develop a positive relationship with each community. This upfront knowledge and understanding of the landscape and community concerns, are critically important when evaluating and ultimately deciding on your project route.



# KNOW

## THE GENERAL

# LANDSCAPE



### NATURAL GAS AND OIL ASSETS, OPERATIONS, & ISSUES

Consider and quantify the historical assets, operations, and issues the industry has had in a community.

- UNDERSTAND the region’s energy assets—oil, natural gas, coal, solar and wind installations, nuclear, hydropower, power plants, electricity transmission, and battery storage.
- BUILD a historic understanding of energy in the region. [Has there been any previous energy pipeline development in the region or is this a greenfield project?](#) If there has been energy development, how long has energy production or transportation been occurring there?
- IDENTIFY current energy companies in the region. [How many energy companies are operating in the region?](#)

### Additional Questions to Consider:

- What type of energy activity takes place in the region already? Natural gas and oil exploration and production? Energy transportation – via pipeline or electricity transmission? Crude oil refining? Solar developments? Nuclear or hydroelectric power generation? Wind farms? Quantifying this activity will be helpful.
- What sort of ways has the industry engaged with communities within the region previously, if at all? Were these efforts helpful and positive? Did they lack an understanding of stakeholders/community concerns? How can you incorporate these factors into your plan?
- Where are the stakeholders who understand the energy industry and are open to development? Do you know where stakeholders who may have potential concerns are located? What media markets overlap with the route? It is helpful to model communities along the route to identify those that are supportive and those that may have concerns that may need addressing. This will help you develop the best way to communicate with each community.

**ISSUES RELATED TO THE INDUSTRY**

If energy infrastructure development has been problematic in a region previously, it is important to understand what motivated those concerns, the perceived impacts, and how operators were able to successfully address community concerns to move projects forward.

**Think about how previous dynamics and driving factors will potentially impact your current work. Be sure to learn from, but not get lost in, the past. Account for what will impact your current and pressing needs.**

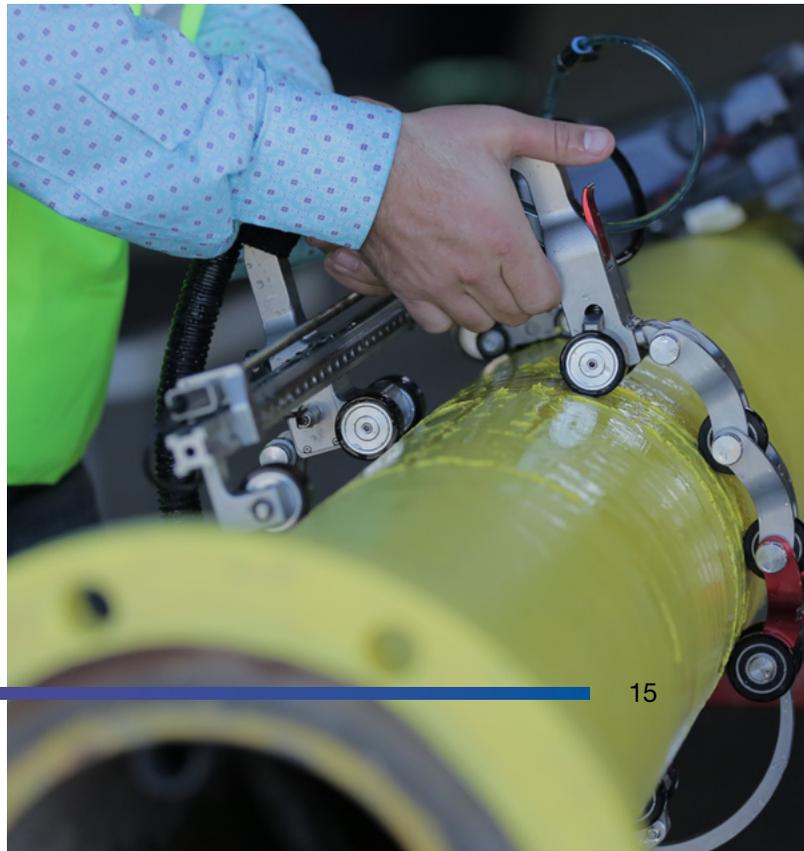
**Some Questions to Consider:**

- Have previous attempts been made to expand, limit, or ban energy production or infrastructure development in a region? If yes, how does this affect your work?
- Are certain types of energy production perceived as negative within a region? What are the perceived negativities? Will this impact your work and how can you communicate ahead of time to mitigate some of these perceptions? Can you address community and stakeholder concerns?
- What other potential energy sources are within a region? How does this affect your work?
- What were the outcomes of previous energy issues? How does this affect your work?
- Have required environmental studies been conducted or been planned? Are you prepared to effectively communicate their results?
- Have economic impact studies been conducted? Are you prepared to effectively communicate their results to ensure the community understands project benefits?

**HELPFUL TIP**

**PLUS KEYS TO SUCCESS:**

- **INTEGRATING** local resources into educational materials.
- **REACHING** audiences proactively to minimize or avoid inaccurate information.
- **EDUCATING**, explaining, and addressing issues at the local, community level.
- **STANDARDIZING** the consistency of the information and materials to be used throughout execution of the plan.



# KNOW

## THE COMMUNITY

# LANDSCAPE

Understanding the needs of a community and its individual residents will require an understanding of the demographics, leaders within a community, and local priorities.

- **UNDERSTANDING** political and geographical boundaries as well as individuals within the communities along the project route is essential in developing an effective engagement plan. Every district has political boundaries such as wards, precincts, and/or townships. Each district also has geographical boundaries such as neighborhoods, cities, towns, parishes, and counties. Identifying the local leaders in a community will help your organization understand who to engage with and help determine what factors are important to the community.
- **IDENTIFY KNOWN COMMUNITY EVENTS.** Every community has local events taking place throughout the year such as summer festivals, concert series, farmers markets, parades, and picnics, etc. Companies may choose to participate in these types of events to maximize their opportunities to engage with local individuals and to establish a mutual understanding between your company and the community. Your involvement in the community and its events, while beneficial in understanding the area in which you hope to work, will have a positive impact on well-established communities comprised of neighborhoods, businesses, and individuals. Your involvement in the community should be well planned; your intentions to benefit the community should be communicated efficiently; and you should have the ability to adapt your level and type of involvement as needed.

- **RESEARCH THE COMMUNITIES IN WHICH YOU PLAN TO BUILD.** It is important to recognize that communities could be very different along the route, and you might need to use different methods to communicate with them. Consider conducting opinion research to understand the community's sentiment toward pipeline construction.

### Some Questions to Consider:

- How big is the region in terms of square miles? Is it possible to drive from one end to the other in the course of a day? How is the terrain?
- How many people live in the region? Are they concentrated in certain populous areas or are they spread throughout?
- What is the demographic makeup of the region's residents?
- Who are the largest employers?
- What groups within the community are local leaders? Labor, business or chamber, educational institutions, churches, citizens groups, environmental groups, conservation or wildlife organizations, minority organizations, or others?
- Are pipelines currently operating this community? Have pipelines been constructed in this community before? Are there any legacy issues?
- What types of events may occur in the community? Do you want to have a presence at these events?
- What makes this community unique? What makes this community similar to other communities?

# KNOW

## THE CIVIC

# LANDSCAPE

- **IDENTIFY LOCAL VALIDATORS.** Validators are community members who understand the benefits of your proposed plan, are a trusted messenger, and are willing and able to speak publicly about their understanding of your project. What type of validators do you need to look for? Think about what factors lead these stakeholders to believe in the benefits of your plan. Is this representative of the community? Understanding validators may assist you in understanding the community makeup.
- **IDENTIFY KNOWN OR POTENTIAL MEETINGS AND EVENTS.** Look for local meetings, community councils, and union local meetings that are open to the public. Possible actions to take include making plans to attend, requesting to be on the agenda, and being prepared to interact with stakeholders. Consider putting these events on your calendar as early as possible and plan to have the right individuals from your company committed to attend.
- **IDENTIFY LOCAL ELECTED OFFICIALS.** Who are the local elected officials who may want to engage with you regarding your proposed project? Consider scheduling a time to meet with them.
- **IDENTIFY OTHER RACES AND BALLOT MEASURES.** Consider what is on the ballot statewide and locally. Who is at the top of the ticket? What state races are taking place? What measures are on the ballot? This is important to understanding the future civic landscape of communities and the region.
- **IDENTIFY EXISTING VOLUNTEERS AND OTHER SUPPORTERS.** There may already be a network of volunteers in the community who have supported your company or projects in the past. Think about engaging with them and the potential for one-on-one meetings. Even if there is just a handful of volunteers, they could be your first contacts and scheduled meetings. Existing volunteers are a vital asset in learning more about the community landscape and its stakeholders.
- **WHAT ELSE IS IMPORTANT TO KNOW ABOUT THE CIVIC LANDSCAPE?** Keep an eye out for any other factors to consider in assessing your landscape.

### Additional Questions to Consider:

- What can you discover about the community and civic landscape by looking online?
- What does the information you can discover online mean for your proposed project and your community engagement plans?
- Are there certain stakeholders you could reach out to? If so, at what time is it appropriate to reach out to them?
- What do your findings reveal about the community and the potential for a positive, long-lasting relationship with your organization?

# KNOW YOUR STAKEHOLDERS

The stakeholders in the area will be important in the acceptance of your project. Knowing the community will help in designing an outreach strategy that will allow you to advance your project by promoting a positive, long-lasting relationship with stakeholders and community members. Understanding the percentage of the stakeholder communities and areas along the route that are rural, suburban, exurban, etc. will be important.

You are going to need a team of stakeholders to help communicate facts regarding the proposed project and ensure accurate and helpful information is reaching the right stakeholders and communities. Each stakeholder has their own story to tell regarding their needs, concerns, and ideas. It is helpful to figure out the most effective message in responding to concerns and ideas and to identify the best people to communicate with each unique stakeholder/group.

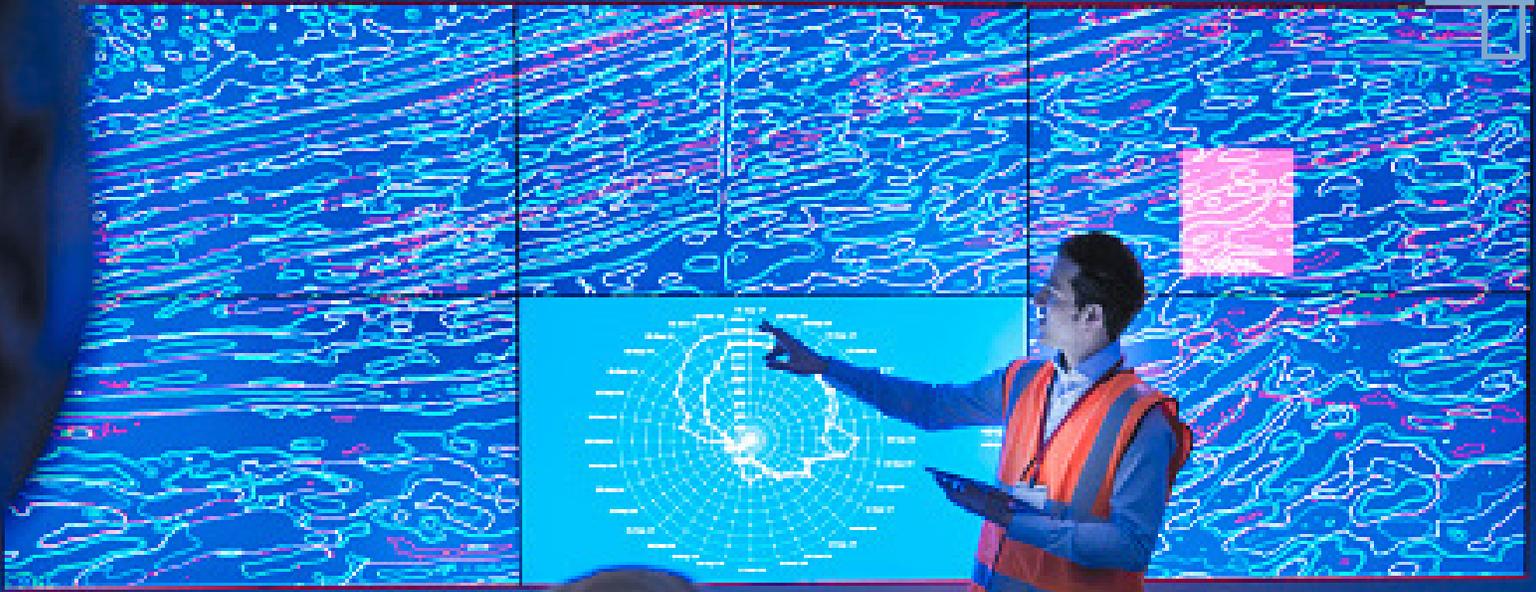
## POTENTIAL STAKEHOLDER COMMUNICATORS

- Elected Officials
- Labor Unions
- Conservation or wildlife organizations
- Local political parties
- Religious leaders
- Educational institutions
- Chamber of Commerce
- Environmental Groups
- Landowner groups
- What other key community groups?

## HELPFUL TIP

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A strong set of facts that are inadequately delivered can derail your goals and objectives. Make sure you have a strategy for how you will communicate with the right communities and stakeholders at appropriate times.



## **STAKEHOLDER MAPPING: INTEREST and REACH**

When considering ways to engage stakeholders and communities, it is important to understand each stakeholder's level of interest in your proposed project and role they wish to play throughout the process.

In order to build relationships with interested groups, your organization may seek to understand how invested each stakeholder or community is in the project. While some communities will be deeply invested in creating partnerships, building relationships, and will be open to discussion, others may be less interested.

Seeking engagement opportunities with stakeholders that have differing levels of interest in your proposed project will allow stakeholders to identify themselves and show they are open to working with you.

Be sure to engage with stakeholders that you envision playing different roles throughout the process. Doing so will ensure inclusion of stakeholders who are open to the project and those who have concerns. Engaging all such stakeholders will ensure you understand the local landscape thoroughly and motivate your organization to identify ways to address those concerns.

The following table may be helpful in organizing what you learn about each stakeholder that you can use when you begin developing your community engagement plan.

<p><b>ORGANIZATION, GROUP, AFFILIATE, LOCAL ELECTED, OTHER</b></p> <p><b>DO THEY HAVE CONCERNS?</b></p>	<p><b>WHO IS THE BEST COMMUNICATOR FROM THIS GROUP?</b></p>	<p><b>WHAT FACTS ARE THEY CONVEYING?</b></p> <p><b>DOES THIS ALIGN WITH YOUR GOALS?</b></p>	<p><b>WHAT IS THE REACH?</b></p> <p><b>LOCAL, STATE, FEDERAL, OTHER</b></p>

# KNOW

## THE MEDIA

# LANDSCAPE

Media coverage of your infrastructure project will play a large role in local perception of the project. You may need to know which reporters and editors help shape public opinion in the community and how they are likely to report on your infrastructure project.

- What media outlets are considered the most reputable and impactful within your region?
- Where do most people in your region get their news? Newspaper? Television? Radio? Online?
- What are the most popular stations, channels, and newspapers? Do they have political leanings?
- What journalists will be covering your project? Have they stated any concerns about similar proposed projects in the past? Are they active on social media?
- Have local editorial boards weighed in on similar projects in the past?

**NOW WHAT:** You are identifying what is happening in the local community and you are starting to understand the scope of your work. Getting too far ahead in the development of the project without engaging stakeholders is not conducive to a positive relationship between operators and communities. Beginning with a comprehensive assessment will be the key to your success. Now that initial research has been completed, it is time to incorporate the knowledge into a community engagement plan.

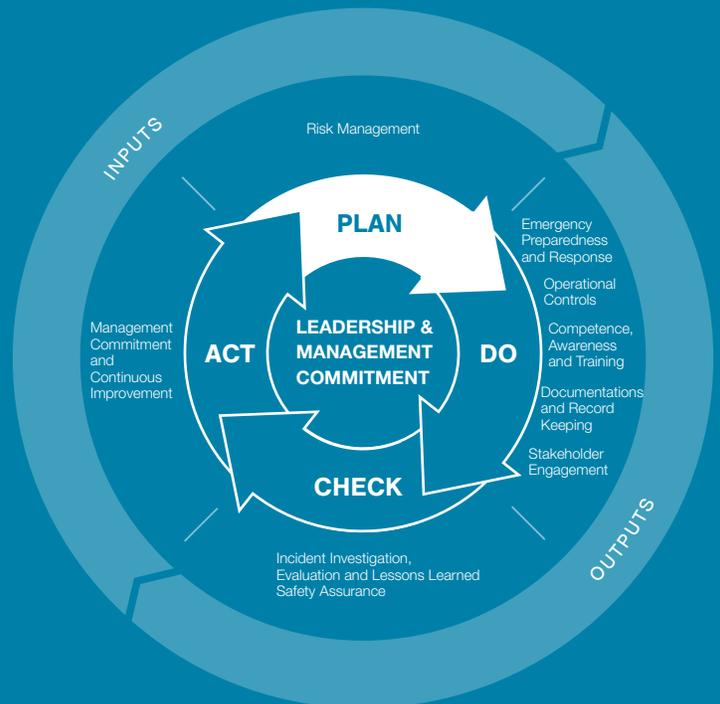


# PHASE 2

## PLAN: Building the Community Engagement Plan

Public impressions of infrastructure projects come from regional politics, economics, demographics, and history. Now that you have identified the unique, regional challenges and opportunities, you can build a community engagement plan that fits the needs of identified stakeholders and local priorities.

The community and stakeholder assessment helps you to know where to focus your attention as you plan. Building the community engagement plan is part of the “Plan” phase of the iterative Plan-Do-Check-Act cycle used to continuously improve programs and processes.



## Some questions to consider and for discussion when building the community engagement plan:

### 1. IDENTIFY STAKEHOLDERS WITH CONCERNS

- What are the top three concerns stakeholders may have with this project? Is there a way to engage with stakeholders to alleviate those concerns? Is there a way to address those concerns?
- What community groups may have concerns with this project? Is there a way to address those concerns?
- What pre-existing partnerships already exist amongst stakeholder groups? Will these relationships impact engagement? If so, what plan can be developed to successfully engage with these stakeholders? Consider whether engagement would be facilitated by individual or multi-group engagement efforts.
- Where does the funding for stakeholder groups originate and will this impact engagement? Does this require engaging other groups or stakeholders?
- What approaches could be used to communicate effectively with stakeholders with concerns that we can address? What about concerns that cannot be addressed?

### 2. IDENTIFY POTENTIAL SUPPORTERS

- What are the top three benefits this project provides to individuals and the community?
- What community groups are likely to recognize the benefits of this project?
- What are your relationships with these groups and individuals?
- What community groups could be provided information that would enable them to support this project? What are your relationships with these potential supporters?
- What role do organized groups (e.g. labor unions) play in the community? Would they be willing to support the project? What concerns may they have and are there ways to address these concerns?
- What relationships do potential supporters have with community leaders, elected officials, etc.? What methods could be utilized to ensure engagement with these leaders? If there are concerns, how will they be addressed?





### 3. DEFINE THE COMMUNITY ENGAGEMENT PARAMETERS

- How do you plan to conduct outreach – through engagement, advocacy, local residents and/or local influencers?
- How will you conduct outreach and engage with those stakeholders with concerns versus without concerns?
- How will the plan be branded?
- Who will be the face and voice of the plan and proposed project?
- Will volunteers or other organizations be helpful?
- Who will be included in making planning decisions?
- Which endorsements by third-party groups, community leaders, and media organizations will be sought?
- In what ways will industry employees partake in outreach and the engagement plan?
- Will the plan take into account help from people outside the region, like the statewide business community? Labor organizations?

### 4. DETERMINE TACTICS/ ACTIVITIES OF THE PLAN

- Promote education, awareness, and learning and work to bridge any knowledge gaps by providing tailored information that is targeted to the community. Host various forums, providing videos and demonstrations to allow for learning and information exchange at all levels of community engagement.

- Provide clear, concise information to all key stakeholders, including community members and local authorities to address potential challenges and issues that could impact them. Operators are encouraged to provide information about potential projects as soon as appropriate to help inform stakeholders so that they may make timely decisions about the proposed project based on its benefits to the community, potential short-term inconveniences and long-term impacts, and the project development and execution.
- Provide structured forums for dialogue around planning and implementation of projects and programs affecting the greater region.
- Establish a process to collect, assess, and manage stakeholders' concerns. Inform stakeholders of the preferred methods for communication, perhaps providing national toll-free phone number, email inbox or by offering contact information for the local field office and corporate personnel responsible for community/stakeholder relations.
- Design and carry out a communication strategy that addresses the community, cultural, economic, and environmental context where a project occurs, and that considers the values and beliefs of local stakeholders, and the way in which they live and interact with each other. Have you or do you plan to develop basic fact sheets with information about how your project impacts the community? Do these fact sheets consider previously established stakeholder and community concerns?
- Is information about the proposed project and answers to commonly asked landowner questions online and easily accessible?

### RAPID RESPONSE:

A rapid response plan equips you with the ability to act with agility, take advantage of breaking news, and to be prepared to respond quickly during an unexpected crisis.

**Some Questions to Consider:**

- Does your company have a rapid response plan, procedures or guidelines already in place?
- Who are the designated spokespeople?
- Which issues are most important to stakeholders and your project?
- What are your key messages?
- Which media outlets will you reach out to?
- What is your process for releasing information?
- What resources will be needed?
- What is the process for approval of talking points, media statements, and other documents that may need to be created and distributed quickly? Who has the final approval for these items?

**PLAN:**  
**Building Internal  
 and External Teams**

Conducting community outreach and building robust support for your infrastructure project will require a team of individuals from within your organization. Everyone from the executives down to volunteers have a role to play. What role could each member of the team play?

The team that will be working on community engagement for the project may be finalized before you start any initial stakeholder outreach, and before you finalize the selection of your project’s corridor.

**YOUR INTERNAL TEAM**

TEAM MEMBER	ROLE	DELIVERABLES



## WITHIN YOUR ORGANIZATION

Your company may need to assemble a team to manage your engagement plan. Your internal team may be comprised of individuals who can speak to the various facets of your organization and to the infrastructure project. The size of your team and potential input required of other subject matter experts within your organization will be predicated on multiple factors associated with the size and scope of the project and potential communities and stakeholders impacted. For example, an effective multidisciplinary team can include, but not be limited to, representatives from communications, government relations, grassroots/community engagement, technical staff, supply chain management, legal, and other key areas of your organization as appropriate.

Time and thought may also be put into identifying the proper individual(s) within your company who will be the best speaker(s) in community engagement sessions, recognizing that the speaker may change based on the audience or the event.

### Some Questions to Consider:

- What kind of audience, setting or event is the speaking engagement?
- What will be the focus and subject of the discussion?  
Is the conversation more technical in nature or is the focus more directed toward a community engagement message?
- Can the spokesperson speak in a manner or at a level of sophistication that is appropriate for the specific audience?
- Is the spokesperson authorized to make commitments on behalf of the company?

- Do any company spokespersons need preparation or media training?
- Could the spokesperson have training in conflict resolution?
- Is the spokesperson at the right level within the company?
- Is there anyone who can participate alongside the company representative in the speaking engagement? (e.g. local official, community leader, etc.)

## VOICE OF EMPLOYEES AND CONTRACTORS

The voices of regional employees and contractors can be especially important as you work to build public support for an infrastructure project. Hearing from workers who live, work, and raise families in the communities around the project provides a valuable local perspective about the benefits associated with your project.

## WAYS TO ENGAGE YOUR INTERNAL TEAM:

The voices of regional employees can be especially important as you work to build public support for an infrastructure project. Hearing from workers who live, work, and raise families in the communities around the project provides a valuable local perspective about the benefits associated with your project.

- DECIDE WHAT PLATFORM IS MOST EFFECTIVE FOR LAUNCHING YOUR PLAN. Whether it is a companywide email, making it the focus of your monthly newsletter, or sending letters to employees' homes— pick a platform that will have wide readership.
- DESIGNATE THE SIGNEE OF THE LAUNCH MESSAGE. The initial launch message could come from someone who is universally known to employees throughout your company. This could be the CEO, the head of a facility, or a department leader.
- CONSIDER HOLDING AN INFORMATIONAL EVENT. Events are a great way to get your message out. By bringing a group of employees together, you can help educate them on the issues your company faces and show them different ways to get involved in helping communicate accurate information and engage with stakeholders.
- MATERIAL DEVELOPMENT. The proper materials and talking points may be created to provide guidance and help your team members effectively communicate and engage.

## YOUR EXTERNAL TEAM

### BUILDING A COALITION OF COMMUNITY LEADERS

Building a coalition of community leaders, first responders, and local residents who can be publicly enthusiastic about the benefits of your project is a critical component in the development of a community engagement plan.

This process may begin when you do your stakeholder analysis in your community assessment, as it will give you information about prominent individuals and groups who are likely to be supportive. Meeting with residents within the project's potential corridor also gives you the opportunity to build relationships with landowners whose support will be integral to the success of your project. It is important to build relationships with these people early on, so they can understand and communicate the benefits of your project once you move into other phases of the project, like meetings with community leaders and announcing the project to the public.

### Some Questions to Consider:

- How will you earn and sustain trust with existing and potential community partners?
- How will you build lasting relationships?
- How will you maintain relationships?
- How will you identify new community partners?
- What relationships do you already have? What is the health of those relationships?
- What relationships could be developed and nurtured?





## SHARING YOUR SUCCESS STORIES

Chances are that your organization already has a positive story to tell about community partnerships. Many operators offer local scholarships, charitable giving programs, and educational support. Spotlighting these community investments will communicate potential community-level benefits to stakeholders and demonstrate the level of commitment of your organization. Recipients of your community support programs are the ideal representatives to explain how you have benefited the community in the short and long term. Their perspective is very valuable to stakeholders and communities considering your project.

## STAKEHOLDER ENGAGEMENT AND COORDINATION

As you develop your community engagement plan, consider creating opportunities for your coalition or stakeholder network to publicly support your issue. Organizing coalitions and finding opportunities to communicate through supportive stakeholders is labor intensive, but important to successfully engage with the community.

### Consider the following:

- Think about taking part in community meetings and informing stakeholders of such events.
- When made aware of stakeholder concerns through press coverage, consider providing helpful information to concerned groups and/or attempting to engage with other groups that are voicing concerns.

## HELPFUL TIP

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Members of the internal or external team and employees of the company including contractors who engage with the public on a daily basis should have an understanding of and be able to speak to the impacts of a project and what will be done to mitigate those impacts.

## LEVERAGING ENERGY STAKEHOLDERS TO ASSIST

Consider conducting an assessment of the supply chain of companies that provide goods and services to your organization and your infrastructure projects. Many local communities are supported by businesses that supply numerous goods and services (hotel accommodations, food vendors, etc.) that you will need for your project. These supply chain vendors have a personal stake in the success of your infrastructure projects, and local companies can be great allies in publicly supporting your project. They can show their support at hearings, in earned and social media, or even in submitting comments or letters.



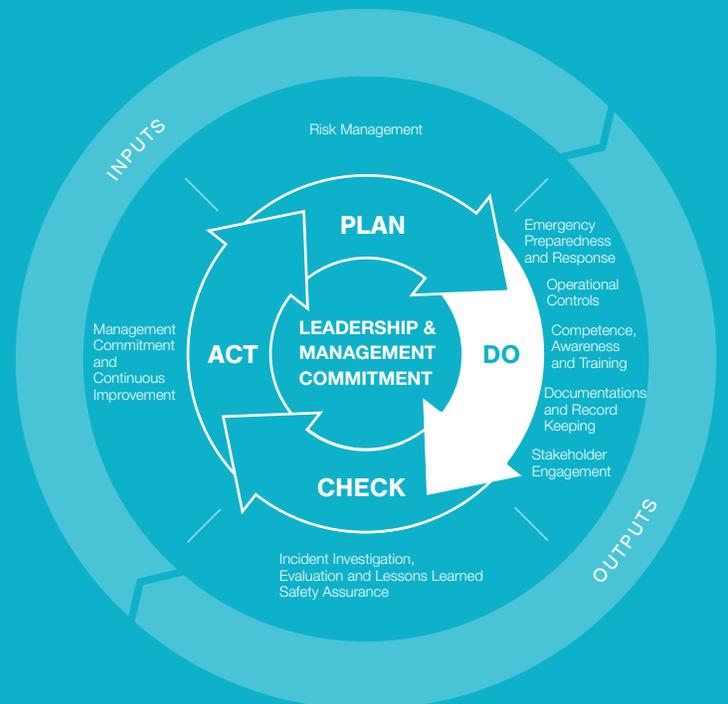
# PHASE

# 3

## ENGAGE:

### Launching the Community Engagement Plan

With your community and stakeholder assessment complete and your community engagement plan in place, you can determine the appropriate time to launch. “Launching the Community Engagement Plan” is part of the “Do” phase of the iterative Plan-Do-Check-Act cycle used to continuously improve programs and processes.





## POTENTIAL METHODS FOR ROLL OUT

- **EVENTS:** Think about meeting large numbers of community members through a variety of events and forums. Use a combination of local calendars and research to schedule opportunities to target your message to the right individuals. You can start holding local events as soon as you are ready to talk about your project, since it is a great way to introduce yourself to community members and other stakeholders who you may not have accounted for in your earlier stakeholder mapping. Events are also a reliable way to show that your company is prepared to be a community partner.
- **DRILLS & EXERCISES:** When it comes to the safety of the pipeline and protecting the public, local and state first responders are an important partner and must be a part of your engagement plan. [Being prepared and ready to respond in the event of an unlikely incident](#) requires outreach and coordinated planning through participation in drills and exercises. The stronger the relationship, the better the preparedness, which benefits your entire community.
- **EARNED MEDIA:** Earned media (e.g. blogs, social media, and publications) coverage will likely begin as soon as your project is announced, but it is always a good idea to get out ahead of this and start meeting with local news stations and reporters beforehand to give them information that could be helpful in their coverage.
- **DIGITAL MEDIA:** Educate residents through an outreach website, social media, email programs and programmatic digital advertising. Digital media is also a great way to stay informed about sentiment in the local community about your project and can help to inform stakeholder engagement discussions.

- **PAID MEDIA:** Local radio, TV, newspapers, and online ads are some of the best ways to get your message out to the community once your outreach plan has begun. Paid media is also a great way to reach new advocates.
- **DIRECT MAIL:** Direct mail is best used in communities where residents may not have widespread access to the internet or to a broadband connection. It is often used for public awareness.
- **NEIGHBORHOOD CANVASSING:** Face-to-face interactions ensure that the community is aware of your issue and how likely individuals are to support you.
- **PHONES:** Contact stakeholders directly to gauge where they stand, remind them of key dates and discuss your issue.

## COMMUNICATIONS ABOUT YOUR PROJECT

Communications and messaging about your project can be based on your initial community assessment and research to be sure you are educating the community about aspects of your project that are important to them. This research may inform any materials you plan to distribute to community leaders and select stakeholders. This could include your introductory letter to landowners, read-ahead, presentations and any materials you plan to distribute (online or hard copies) as a part of the public announcement of your project.

Your communications theme is the overarching rationale behind your community outreach plan, e.g. your commitment to safety and the community, your contribution to the local economy, etc.

Your messages may be specific, more detailed, more focused and succinctly communicate the specific benefits to the community and individuals that give local stakeholders confidence that they can actively support your infrastructure project—and get involved in your plan. Your messages may be flexible enough that they can be tailored to specific audiences and situations and have the capability of evolving. Messages can reinforce the overarching theme.

**HELPFUL TIP**

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Messages about your project can be based on your initial community assessment and research and may inform materials you plan to distribute to community leaders and select stakeholders. Messages may be updated pending new research data.

## CHARACTERISTICS OF GOOD COMMUNICATIONS

The success of a community engagement plan often hinges on developing the right theme and messaging and having the ability to project that message to stakeholders through the most effective means available. When creating your message, there are important characteristics to consider:

- CLEAR AND CONCISE: Stakeholders have little patience and tolerance for longwinded messaging. Your plan may consider expressing key messages in a few phrases.
- CREDIBLE: Messages should be rooted in fact. If community members feel like they are missing information or that you are exaggerating, you risk losing their support. Information is often more credible if backed up by third-party validators such as Energy Information Administration (EIA), U.S. Department of Labor, a union group, an environmental interest group, state environmental department, a local city council or township group, or a state public utility commission.

## MESSAGE FRAME

A message frame visually allows you to see potential messages from both sides of an issue—detailing what your team says about the proposed project, what your team says regarding concerns raised about your project, what is said about your project, and what the concerned stakeholders say about themselves. This exercise may help you anticipate and think through your strengths, weaknesses, opportunities, and potential issues, leading to improvements in your messaging and potential mitigation strategies.

# MESSAGE FRAME

## Values-Based Narrative Frame Worksheet

A message frame visually allows you to see potential messages from both sides of an issue—detailing what your team says about the proposed project, what your team says regarding concerns raised about your project, what is said about your project, and what the concerned stakeholders say about themselves. This exercise may help you anticipate and think through your strengths, weaknesses, opportunities, and potential issues, leading to improvements in your messaging and potential mitigation strategies.



How do we want to describe **OUR PLAN** in two sentences?

.....

How do we want to describe **concerns** in two sentences?

### MESSAGE GRID / BULLET-PROOF POINTS

The message grid on page 33 may speak to the questions above. The next page shows an example of a message frame based on a plastic bag tax.

## STATEWIDE PLASTIC BAG TAX MESSAGE FRAME

### WHAT SUPPORTERS SAY [typically...POSITIVE]

- Plastic bags are a large portion of litter in our state and are bad for the environment
- Plastic bags are one of the more visible sources of litter which is bad for tourism
- The revenue from the tax can be used for environmental purposes, like renovating public parks, and cleaning up litter from local rivers and streams

### WHAT CONCERNED STAKEHOLDERS SAY [typically...NEGATIVE]

- Plastic bags make up a very small portion of overall litter and waste
- Any tax, no matter how small, has a negative impact on those living on fixed incomes – mainly working families and senior citizens
- Reusable bags contribute to the spread of diseases like E. Coli, since people don't wash them and leave them in areas where it is easier for bacteria to grow

### WHAT CONCERNED STAKEHOLDERS SAY AGAINST SUPPORTERS [typically...NEGATIVE]

- Even if you ban plastic bags, you're making a negligible impact on overall litter and waste
- Environmental funding is an empty promise
- Legislators should be working on issues like the economy and healthcare, not legislating what kind of bags people are permitted to use for their groceries

### WHAT SUPPORTERS SAY AGAINST CONCERNED STAKEHOLDERS [typically...POSITIVE]

- Even if plastic bags aren't a big portion of litter, using less plastic is always a good thing
- Reusable bags aren't expensive, even low-income families can afford them and use them
- The thin plastic bags that you use for vegetables or meat in the grocery store will still be allowed, so contamination via reuse of cotton bags will be a non-issue

## ENACTING YOUR PLAN AND GETTING YOUR MESSAGE OUT

Once your message is finalized, it is incumbent upon the team to develop a strategy to get the message out to the right stakeholders and to execute the message plan.

### MEDIA ENGAGEMENT

Most pipeline projects that impact the community will draw some level of media attention. At a minimum, local media may be interested in covering the project to discuss the impacts on the local communities that follow it. However, some projects may draw even greater attention at the state, regional and even national levels. Properly engaging with the media will help ensure that they have appropriate facts and figures and that their coverage will be based on fact rather than emotion.

## HELPFUL TIP

When rolling out your communication plan, consider having conversations with key stakeholders, community partners, and supporters prior to the launch. This will assist in creating continuity in your message and this pre-roll out will help to build lasting relationships.



## MEDIA ENGAGEMENT TIPS

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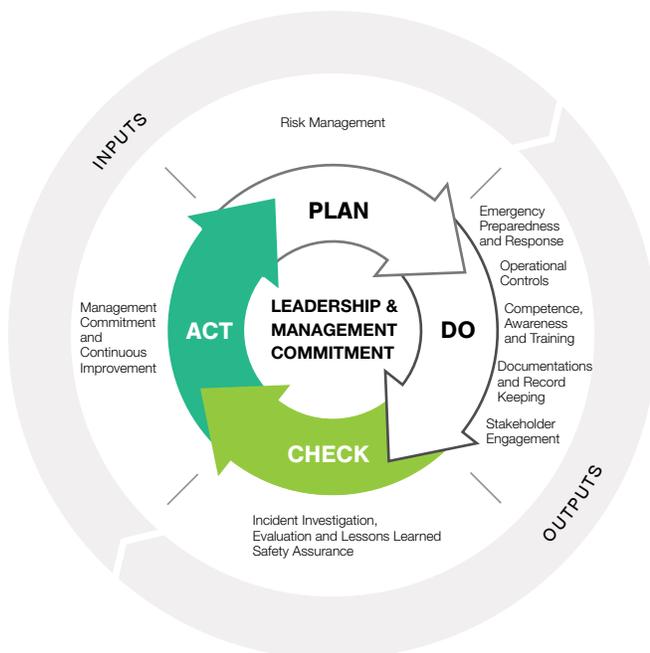
- Always BCC reporters on all press releases and advisories.
- Place advisory text in the body of the email, and do not send as an attachment.
- Ask reporters – especially TV assignment desks – what they are interested in covering. Try to tailor events to what they want to cover.
- Background conversations can be important in educating media on the facts surrounding your project. Identify volunteers with compelling personal stories for interviews. Background can mean different things to different reporters, so make sure the terms are clearly understood up front by you and the reporter.
- Television stations have morning meetings around 9:00am local time to determine which stories to schedule.
- Weekdays are better than weekends for press coverage. Try to hold events between 10:00am and 2:00pm.
- Host events in strategic locations. Consider hosting outside the office or near a news outlet.
- Some local stations and newspapers will have an event calendar where the public can add events so other visitors to the website can see upcoming events.
- You will typically talk to the assignment desk, but every outlet is a little different. Talk to whomever you can get on the phone and find out who the best person is to talk to next time.
- Keep track of outlet phone numbers. Use outlet phone numbers to confirm the outlet received the advisory, call the day before to make a full-on pitch call and call the morning of the event, almost like a final confirmation call.

## ASSESSING AND ADJUSTING YOUR PLAN

Understanding who is supporting your project and the effectiveness of your communications and outreach will drive adjustments to your engagement plan. Polling and research are part of the “Check” phase to evaluate the effectiveness of your engagement plan and conduct improvements to close any identified gaps.

### There are four main areas research will inform:

1. What information is important to which groups? What do these stakeholders care about? Have their priorities changed over time?
2. How will you respond to concerns communicated through media sources?



3. Who are the best individuals to communicate about your infrastructure project? Are your current spokespeople resonating with your target audience?

4. What information is suited to specific stakeholders? How successful have you been in addressing concerns through the information you provide? ○

ONGOING RESEARCH may serve as a check for how well your plan is doing throughout its implementation. Finding the appropriate firm is critical to ensuring your plan is effective. Care may be taken to ensure that any research firm used is providing honest information that a company NEEDS to hear rather than information it WANTS to hear. It is imperative that companies remain open to improvements that can be made throughout the entirety of the engagement plan. Employees who do not feel free to raise opportunities for change and growth could put the project at risk through the implementation of an ineffective plan that wastes resources and time.

- CONDUCT RESEARCH once you have completed your community assessment and have identified the issues that are likely to be flashpoints in the conversation about your project.
- POST-RESEARCH Your research may indicate that your internal team may need to adjust the messaging around your project or the methods by which they are communicating with supporters and any stakeholders with concerns. Issues that are likely to be flashpoints in the conversation about your project.
- POLLING could be conducted in both a quantitative (survey) and qualitative (focus groups/panels) manner. Polling and focus groups conducted by experts can provide insights that can help hone the information you are sharing as well as to inform ongoing targeting and analytics programs.

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# COMMUNITY ENGAGEMENT GUIDELINES

## Thank you!

**FUTURE EFFORTS:** Paving the way for energy infrastructure projects is essential to our industry's work and to the expansion of jobs and opportunity in many communities. Building support for projects within local communities requires well-developed, strategically executed community outreach plans—plans driven by local voices.

Utilizing the **Plan-Do-Check-Act (PDCA)** cycle will encourage operators to continuously improve their relationships with stakeholder and communities. This document highlights recommended best practices in the “Plan”, “Do”, and “Check” phases designed to improve their plans to engage with communities and stakeholders, learn from experiences, and build and sustain positive relationships with a variety of stakeholders. Further guidance will help operators conduct the “Act” phase, improve engagement plans and continue to build lasting relationships throughout the life cycle of a pipeline.

Recognizing the role operators play in relationship building with communities is vital. Principles of respect, integrity, safety and environmental responsibility, openness, and responsiveness to community concerns are crucial in creating partnerships with the communities where we hope to operate. Adopting these principles within the pipeline industry will assist in facilitating effective communication and positive partnerships with all our stakeholders.

Please reach out to **Emily Smith** with any questions or comments. API is happy to provide additional details as requested.

**For more information** please reach out to **Emily Smith** | [SmithEA@api.org](mailto:SmithEA@api.org) | **202.682.8153** with any questions or comments. API is happy to provide additional details as requested.

