

The Conference  
Board of Canada



# Strong Engagement, Strong Outcomes

An Engagement Indicators Playbook



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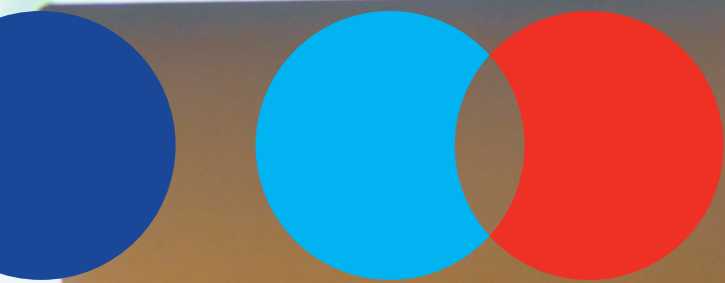
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## Introduction

# Why We Engage





**Meaningful, open, and transparent community engagement is a core aspect of Canada’s federal impact assessment process. Decisions about major natural resource or infrastructure projects can affect the daily lives of people in local communities. Meaningful community engagement allows those who are most affected by a project to participate in the decisions that directly impact them.**

But what is meaningful community engagement? It ensures:<sup>1</sup>

- Those who want to participate in project decisions have the opportunity to do so.
- Communities have access to the information they need to participate in an informed way.
- Community input informs and influences project decisions.
- Engagement is inclusive and timely.

Meaningful engagement recognizes that project impacts are not just environmental, but also social, cultural, and economic.

The federal *Impact Assessment Act*<sup>2</sup> requires that communities have meaningful engagement, including opportunities to participate throughout the assessment process. Federal impact assessment generally follows a similar series of steps, regardless of the communities

involved. But impact assessment engagement with Indigenous communities has unique elements and characteristics. This is especially true when looking at a proponent’s engagement practices as compared with the Crown’s consultation duties and responsibilities.



Engaging with communities is an ongoing process between a proponent, stakeholders, and rightsholders, including Indigenous and non-Indigenous community members, Indigenous and non-Indigenous governments, and non-governmental organizations.

1 Impact Assessment Agency of Canada, *Fact Sheet: What Is Meaningful Participation?*

2 *Impact Assessment Act* (SC 2019, c. 28, s. 1), [laws-lois.justice.gc.ca/PDF/1-2.75.pdf](https://laws-lois.justice.gc.ca/PDF/1-2.75.pdf).

## Who Should Use This Playbook?

- **Indigenous communities, public stakeholders, and local communities** potentially impacted by a major project development.
- **Project proponents** undertaking engagement activities as part federal impact assessments.
- Anyone developing a community engagement plan as part of federal impact assessment processes.

## How This Playbook Can Help

The playbook is a tool to support the success of community engagement and public participation activities on major projects, as part of the federal impact assessment process.

The purpose of this tool is to help communities **choose the project impacts and community engagement activities** they would like to track and monitor.

It can also help proponents and communities work together more effectively, to **co-create a community engagement plan** that facilitates meaningful engagement.

Specifically, it provides a checklist of potential indicators that you can incorporate into a community engagement plan.



Applying a set of **indicators** to a community engagement plan can help build trust between proponents and communities. It facilitates agreement on priorities and clarifies expectations. It also helps keep everyone accountable for their role in the community engagement process.

These indicators can help proponents and communities co-develop a community engagement plan that tracks and measures:

1. project impacts and benefits that are important to the community;
2. the progress and effectiveness of community engagement activities;
3. the project's contribution to local community and national climate action plans.

## How to Use This Playbook

The playbook is designed as a tool to help guide decisions around Indigenous and community engagement activities.

Communities and project proponents are encouraged to work collaboratively to select the most appropriate indicators for your community engagement plan.

Communities can work with proponents to choose the indicators that matter to them, based on their own unique values and monitoring needs.

The chosen indicators can then be incorporated into your community engagement plan, and form the basis for tracking, monitoring, and assessing community engagement activities.

## Where to Start

Has your community considered what values are most important? If you haven't, we suggest undertaking a community visioning exercise. We talk about that further in the next section.

## Your Values, Your Engagement

Your community's values are the foundation of an effective engagement plan. Understanding your community's values will help identify key issues around the proposed project. It will also help you prioritize what indicators you want to track and measure, and when you want to measure them.

## The indicators fall under three broad themes:



### Community Impacts – Defining Project Impacts and Benefits

These indicators track and measure project impacts and benefits, risks, and opportunities.



### Community Engagement – Assessing the Engagement Process

These indicators track and measure the progress and effectiveness of community engagement activities.



### Climate Action – Linking Projects to Net Zero Targets

These indicators can be used to link projects to local and national climate action goals.

## Community Vision Drives Community Values

Before engaging with a proponent or working through the process outlined in this playbook, communities should ideally have undertaken a community planning and/or visioning exercise. Communities and their members are best placed to determine their long-term visions, priorities, values, and needs—all of which are pivotal to outlining a good quality of life for residents. There are numerous tools available for developing a community plan and vision.

Having a community plan and vision in place—with clearly articulated values—enables communities to determine what is most important when considering the impacts and benefits associated with a major project, and how they would like to engage with proponents. It will also guide them in determining how best to use this playbook, which indicators and steps should be prioritized, and what the end goal is.

## Community Values

Communities have deeply held values. These community values around environmental and human health and well-being are at the heart of community engagement best practices. Communities will have questions and concerns about how a project will impact their well-being. Your values inform specific questions about project impacts and cumulative effects specific and unique to each community.



## What is community?

This playbook uses the term “community” in a place-based sense. It is the network of individuals, institutions, and organizations that interact within a region or territory that is smaller than a provincial/territorial form of government. Communities are characterized by their size, a form of local government, and may include regions, cities, townships, hamlets, reserves/settlement areas, etc.

**Your community’s unique social, economic, environmental, and cultural way of life collectively helps a community and its members to flourish. These dimensions of well-being inform your community’s selection of indicators:**



### **Social**

Crime; community health impacts (e.g., addictions, mental and physical health); potential community health benefits, gender-related impacts (e.g., gendered violence and daycare); local infrastructure and social services.



### **Economic**

Training and skills, employment opportunities, progression of careers over time, diversity and inclusion.



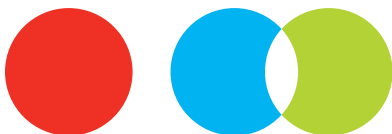
### **Environmental Health**

Climate change and transition to net zero, water quality, air quality, and cumulative effects of industrial development.



### **Indigenous Rights and Culture**

Land and water, health of traditional food and medicine, cultural and spiritual practices.





## Understanding Community Values to Inform Indicator Selection

Each community will have a different experience with the impact assessment process. And each community will have a different degree of capacity or experience to engage. An impact assessment project can potentially influence any or all of these dimensions of community well-being. Once your community articulates your core values, these values can be used to inform what project planning, design, and impacts are of greatest concern. Your community can then develop a community inventory of these concerns to inform and measure specific indicators.

The community engagement process can be used to prioritize key concerns and needs to inform which indicators are the most important to track and measure. Each community will have a different number of indicators it wants to measure. In addition, the community may want to measure different indicators at different stages of the project. The playbook helps your community to express the key risks and concerns about a project and proponent's process, which provides proponents with insights into their social license to operate.



## Indigenous Values

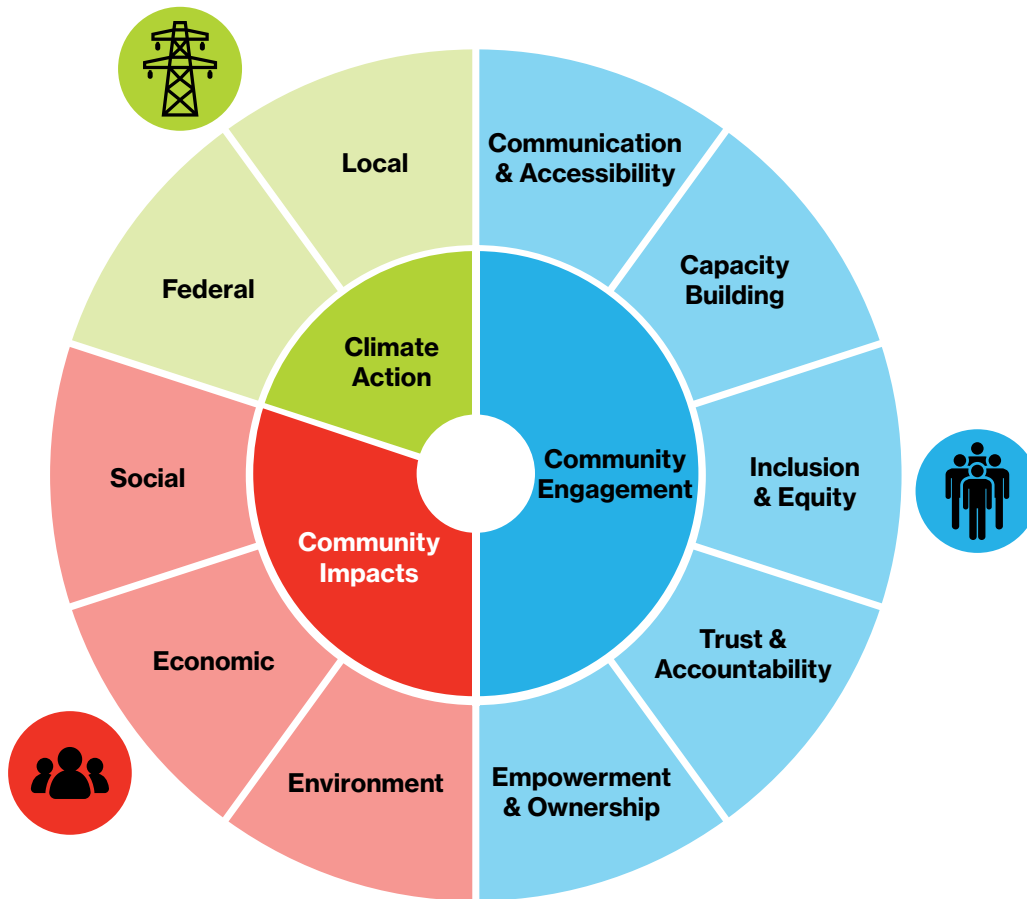
Engagement with Indigenous communities should be conducted in the spirit of reconciliation. It should be guided by the Truth and Reconciliation Commission's Calls to Action and the United Nations Declaration on the Rights of Indigenous Peoples. Engagement must be conducted with attention to constitutionally protected Aboriginal rights, historic treaties, and modern land-claim agreements. And it must be mindful of other Indigenous priorities and seminal initiatives, such as the findings from the national inquiry and final report on Missing and Murdered Indigenous Women and Girls. In addition, acknowledging the uniqueness of each community will facilitate the development of stronger and more meaningful relationships throughout the engagement process.

Indigenous connections to the land are integral to community health and well-being. Major projects have the potential to impact these values and connections, as well as interfere with traditional activities and constitutional rights. Indigenous ways of knowing have their own space, and best practice suggests they be valued for the inherent contribution they make to project design and environmental assessments.

Note: For more information on Indigenous priorities and initiatives, please see the list of resources in Appendix B.

The Engagement Indicator Wheel is a graphic representation of the three broad themes of indicators and their subsections. (See Exhibit 1.) Each subsection provides a list of potential indicators to include in your community engagement plan.

**Exhibit 1**  
**Engagement Indicator Wheel**



Source: The Conference Board of Canada.

## Community Engagement Best Practices

The playbook assumes that proponents and communities will work collaboratively to develop community engagement plans based on well-established best practices. These include:

1. Engaging early and often, and throughout the life cycle of the project
2. The project's community engagement plan is co-designed and developed collaboratively between the proponent and the community early in the Planning phase of the impact assessment process (or earlier!)
3. Indigenous communities are provided with the opportunity to:
  - co-design environmental and cultural protection and monitoring plans and studies based on Indigenous knowledge
  - establish consultation and engagement protocols
  - set the pace and timing of engagement activities, and to ensure engagement events do not coincide with cultural activities.
4. The proponent has worked with the community to identify a community liaison and, where possible, establish a community advisory committee that can represent the interests of the community.
  - In some cases, this will also include advisory subcommittees, to ensure all community voices have the opportunity to be heard.
5. Proponents are committed to responding meaningfully to community concerns about project impacts.
6. Both the proponent and the community are committed to respectful and timely communication.

Engagement during the planning phase helps proponents identify the community's long-term monitoring needs and incorporate those into the project's design. It is also an opportunity to identify the resources and funding that communities may require to fully participate in the impact assessment process.

Note: For more information on community engagement best practices, and funding programs to support participation in the impact assessment process, please see the list of resources in Appendix B.



Engagement should begin as early as possible to build trust between proponents and communities, to promote a sense of collaboration, community empowerment, and ownership. Early and ongoing dialogue that is responsive to community concerns builds trust in the project assessment and regulatory approval process.

## When to Use This Playbook

Community engagement activities typically begin during the planning phase of a federal impact assessment and continue throughout the process. (See Exhibit 2.)

But community engagement best practices suggest **engagement should continue throughout the project life cycle.**

Project proponents and communities are encouraged to **co-develop community engagement plans that span the life of a project.**

Many of the indicators in the playbook can apply to multiple phases of a project: planning and design, impact statement, impact assessment, and post-decision. Post-decision includes the construction, operation, and closure of a project's life cycle. This includes ongoing monitoring of a project's impacts.

It is also helpful to periodically re-evaluate the community engagement plan and the indicators chosen for the plan throughout the project life cycle, to ensure the plan continues to reflect the community's environmental, cultural, social, and economic concerns.

## Things to Keep in Mind

- The guidance provided by this playbook is **not an additional regulatory requirement.** It is a tool to support the success of community engagement activities, as part of the federal impact assessment process.
- The playbook offers an extensive list of indicators. **Not every indicator will apply to every project.** Communities should work with project proponents to **choose the indicators that matter** to them.
- **Community engagement should be ongoing throughout the project life cycle.** With this in mind:
  - Community engagement plans and indicators should be reviewed regularly, to ensure they continue to meet the needs of communities as the project evolves.
  - It may be appropriate to revise the selection of indicators as conditions change.

### Exhibit 2

#### Five Phases of the Federal Impact Assessment Process



Sources: Impact Assessment Agency of Canada; The Conference Board of Canada

## Playbook Indicators

This is the main part of the exercise: choosing indicators. There are three sections of indicators:



**Community Impacts – Defining Project Impacts and Benefits**



**Community Engagement – Assessing the Engagement Process**



**Climate Action – Linking Projects to Net Zero Targets**

Each section of **indicators** includes subsections. Each **subsection** includes a list of potential indicators that you can choose to include in your community engagement plan.

Indicators come with a suggested **Metric** to help you assess the indicator's performance. You can adopt or adapt the metrics to your community's unique needs.

**Clarification questions** ask you to think about the reasons for your scores and logical questions to ask in your relationship with a proponent.

**Section 4** will tell you what to do with your chosen indicators.



### Keep in Mind

When selecting indicators, ask yourself these questions:

- What are your community's priorities and vision for its long-term well-being?
- What are your community's desired levels of involvement in engagement activities?



**Section 1**

**Community Impacts:  
Defining Project  
Impacts and Benefits**





**These indicators can be used to track the project impacts and benefits, risks, and opportunities the community identifies as priorities for monitoring.**

**They fall under three subsections:**

- A** Community and Social Well-Being
- B** Economic Well-Being
- C** Environmental Well-Being

## **Remember the Five Phases of Assessment**

**The five phases of a federal impact assessment are:**

Planning, Impact Statement, Impact Assessment, Decision-Making, and Post-Decision. Post-Decision includes the construction, operation, and closure of a project. This includes ongoing monitoring of a project's impacts.



## **A** Community and Social Well-Being

Indicator category	Indicator	Metric	Clarification questions
Social Impacts/Benefits (Social Well-Being)	<p>The proponent is adequately consulting the community on the following project impacts/benefits to community and social well-being. (Choose all that apply.)</p> <ul style="list-style-type: none"> <li>• community health effects</li> <li>• gender-related impacts/benefits</li> <li>• impacts to marginalized groups</li> <li>• traditional foods and activities</li> <li>• social services impacts</li> <li>• fire services</li> <li>• ambulance services</li> <li>• emergency planning and disaster response</li> <li>• local infrastructure (e.g., roads, telephone, and bridges)</li> <li>• traffic patterns</li> <li>• drinkable water</li> <li>• housing availability</li> <li>• recreational assets/opportunities</li> <li>• skills training and education</li> <li>• opportunities for engagement, monitoring, and project employment</li> <li>• energy prices, home heating cost/affordability</li> <li>• other relevant impacts/benefits highlighted by the community</li> </ul>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree (Rate separately for each that apply.)</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases of assessment.</p>	<ul style="list-style-type: none"> <li>• Why does your community think this?</li> <li>• When are they consulting?</li> <li>• How are they consulting?</li> <li>• What is adequate consultation to the community?</li> <li>• How will these impacts/benefits be measured and monitored?</li> </ul>
Cumulative Impacts (Social Well-Being)	<p>The proponent is adequately consulting on cumulative impacts to community and social well-being.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What is adequate consultation to the community?</li> <li>• How will these impacts be measured and monitored?</li> </ul>
Community Input (Social Well-Being)	<p>The proponent is incorporating the community's input into the following:</p> <ul style="list-style-type: none"> <li>• project planning and design</li> <li>• impact statement</li> <li>• impact assessment</li> <li>• mitigation plans</li> <li>• adaptive management plans</li> <li>• monitoring plans</li> <li>• project closure</li> </ul>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree (for each)</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• What does meaningful incorporation look like?</li> </ul>
Community Understanding (Social Well-Being)	<p>The project's community and social impacts/benefits are understood by the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, and Impact Assessment phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• How will these be measured and monitored?</li> </ul>
Community Acceptance (Social Well-Being)	<p>The project's impacts/benefits are acceptable to the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, and Impact Assessment phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> </ul>



## Indigenous Rights and Culture

Indicator category	Indicator	Metric	Clarification questions
Cumulative Impacts (Indigenous Well-Being)	The proponent is adequately consulting on cumulative impacts to Indigenous rights and community and cultural well-being, including traditional practices and land use.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• When are they consulting?</li> <li>• How are they consulting?</li> <li>• What is adequate consultation to the community?</li> <li>• How will these impacts/benefits be measured and monitored?</li> </ul>
Rights Assessment	The proponent has adequately consulted the community on the Indigenous rights impact assessment.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, and Impact Assessment phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• When are they consulting?</li> <li>• How are they consulting?</li> <li>• What is adequate consultation to the community?</li> </ul>
Cultural Impact Assessment	The proponent has adequately consulted the community on the cultural impact assessment.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, and Impact Assessment phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• When are they consulting?</li> <li>• How are they consulting?</li> <li>• What is adequate consultation to the community?</li> </ul>
Archaeological Assessment	The proponent has adequately consulted the community on the archaeological assessment.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, and Impact Assessment phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• When are they consulting?</li> <li>• How are they consulting?</li> <li>• What is adequate consultation to the community?</li> </ul>
Understanding Indigenous Rights Mitigation Plans	The proponent's Indigenous rights mitigation plans are understood by the community.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• How can the proponent and community arrive at mutual understanding?</li> </ul>
Acceptance of Indigenous Rights Mitigation Plans	The proponent's Indigenous rights mitigation plans are acceptable to the community.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• How will these plans be measured and monitored?</li> </ul>
Understanding Indigenous Cultural Impact Mitigation Plans	The proponent's cultural mitigation plans are understood by the community.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree /Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• How can the proponent and community arrive at mutual understanding?</li> </ul>

(continued ...)

Acceptance of Indigenous Cultural Impact Mitigation Plans	The proponent's cultural impact mitigation plans are acceptable to the community.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• How will these plans be measured and monitored?</li> </ul>
		Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	
Understanding Indigenous Rights Monitoring Plans	The proponent's Indigenous rights monitoring plans are understood by the community.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• How can the proponent and community arrive at mutual understanding?</li> </ul>
		Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	
Acceptance of Indigenous Rights Monitoring Plans	The proponent's Indigenous rights monitoring plans are accepted by the community.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• How will these plans be measured and monitored?</li> </ul>
		Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	
Understanding Indigenous Cultural Impact Monitoring Plans	The proponent's Indigenous cultural impact monitoring plans are understood by the community.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• How can the proponent and community arrive at mutual understanding?</li> </ul>
		Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	
Acceptance of Indigenous Cultural Impact Monitoring Plans	The proponent's Indigenous cultural impact monitoring plans are accepted by the community.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• How will these plans be measured and monitored?</li> </ul>
		Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	





## B Economic Well-Being

Indicator category	Indicator	Metric	Clarification questions
Economic Impacts/ Benefits	<p>The proponent is adequately consulting the community on economic impacts/benefits:</p> <ul style="list-style-type: none"> <li>• equitable access to jobs</li> <li>• skills training and education</li> <li>• opportunities for engagement, monitoring, and project employment</li> <li>• balance of full-time and part-time, and local vs. fly-in jobs</li> <li>• long-term sustainable economic benefits</li> <li>• other relevant impacts/benefits highlighted by the community</li> </ul>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree (Rate separately for each that apply.)</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why does your community think this?</li> <li>• When are they consulting?</li> <li>• How are they consulting?</li> <li>• What is adequate consultation to the community?</li> <li>• How will these impacts/benefits be measured and monitored?</li> </ul>
Community Understanding (Economic Well-Being)	<p>The economic impacts/benefits associated with the project are understood by the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• How can the proponent and community arrive at mutual understanding?</li> </ul>
Community Acceptance (Economic Well-Being)	<p>The economic impacts/benefits are acceptable to the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• How will results be measured and monitored?</li> </ul>
Understanding Local Hiring and Procurement Plans	<p>The proponent's local hiring and procurement plans are understood by the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• How can the proponent and community arrive at mutual understanding?</li> </ul>
Acceptance of Local Hiring and Procurement Plans	<p>The proponent's local hiring and procurement plans are acceptable to the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• How will results be measured and monitored?</li> <li>• Are these plans being realized post-decision? Why or why not?</li> </ul>

(continued ...)

Economic Benefits Distribution	The community understands how the economic benefits of the project are distributed between the federal, provincial/territorial governments, and communities.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, and Impact Assessment, and/or during Community/Impact Benefit Agreement negotiations (CBAs/IBAs).	• Why? Explain your score.
Economic Rents Distribution	The community understands how the economic rents (e.g., royalties and taxes) of the project are distributed between the federal, provincial/territorial governments, and communities.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, and Impact Assessment, and/or during Community/Impact Benefit Agreement negotiations (CBAs/IBAs).	• Why? Explain your score.

## **C** Environmental Well-Being

Indicator category	Indicator	Metric	Clarification questions
Environmental Impacts/Benefits	The proponent is adequately consulting the community on the following environmental impacts/benefits: (Choose all that apply.) <ul style="list-style-type: none"> <li>• air pollution</li> <li>• water pollution and responsible water use</li> <li>• noise and light pollution</li> <li>• energy conservation</li> <li>• waste reductions and/or circular systems<sup>31</sup></li> <li>• other relevant impacts/benefits highlighted by the community</li> </ul>	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree (Rate separately for each that apply.)  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why does your community think this?</li> <li>• When are they consulting?</li> <li>• How are they consulting?</li> <li>• What is adequate consultation to the community?</li> <li>• How will these impacts/benefits be measured and monitored?</li> </ul>
Cumulative Environmental Impacts	The proponent is adequately consulting the community on cumulative environmental impacts.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What is adequate consultation to the community?</li> </ul>

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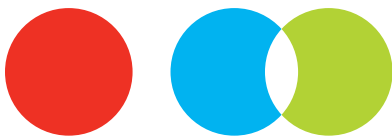
<sup>3</sup> Circular systems are systems where nothing goes to waste. Everything is reused, repaired, refurbished, remanufactured, repurposed, or recycled. Throwing away is a last resort.



Community Input (Environmental Well-Being)	<p>The proponent is incorporating the community's input into the following:</p> <ul style="list-style-type: none"> <li>• project planning and design</li> <li>• environmental impact statement</li> <li>• environmental impact assessment</li> <li>• mitigation plans</li> <li>• adaptive management plans</li> <li>• monitoring plans</li> <li>• project closure</li> </ul>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree (for each)</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What is meaningful incorporation to the community?</li> </ul>
Community Understanding (Environmental Well-Being)	<p>The project's environmental impacts/benefits are understood by the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• How will these be measured and monitored?</li> </ul>
Community Acceptance (Environmental Well-Being)	<p>The project's environmental impacts/benefits are accepted by the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, how can the community and proponent arrive at mutual understanding?</li> </ul>
Understanding Environmental Mitigation Plans	<p>The proponent's environmental mitigation plans are understood by the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• How will these be measured and monitored?</li> </ul>
Acceptance of Environmental Mitigation Plans	<p>The proponent's environmental mitigation plans are accepted by the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, how can the community and proponent arrive at mutual understanding?</li> </ul>
Understanding Environmental Adaptive Management Plans	<p>The proponent's environmental adaptive management plans are understood by the community.</p>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• How will these be measured and monitored?</li> </ul>

(continued ...)

Acceptance of Environmental Adaptive Management Plans	The proponent's environmental adaptive management plans are accepted by the community.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score</li> <li>• If disagree, how can the community and proponent arrive at mutual understanding?</li> </ul>
Understanding Environmental Monitoring Plans	The proponent's environmental monitoring plans are understood by the community.	Strongly Agree/Agree/Somewhat Agree /Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• How will these be measured and monitored?</li> </ul>
Acceptance of Environmental Monitoring Plans	The proponent's environmental monitoring plans are acceptable to the community.	Strongly Agree/Agree/Somewhat Agree /Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, how can the community and proponent arrive at mutual understanding?</li> </ul>



## Section 2

# Community Engagement: Assessing the Engagement Process





**These indicators can be used to track and monitor the community engagement process.**

**They fall under five subsections:**

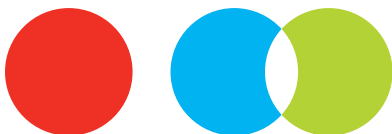
- A** Empowerment, Ownership, and Meaningful Engagement
- B** Trust and Accountability
- C** Inclusion and Equity
- D** Capacity Building/Training for Engagement
- E** Communication and Accessibility



## Keep in Mind

When selecting indicators, ask yourself these questions:

- What are your community's priorities and vision for its long-term well-being?
- What are your community's desired levels of involvement in engagement activities?



## A Empowerment, Ownership, and Meaningful Engagement

Indicator category	Indicator	Metric	Clarification questions
Engagement Plan Co-Development	The community feels empowered to co-develop the engagement plan with the proponent.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in at Planning phase (or earlier).	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If no, is it a question of capacity? (See Capacity Building/Training.)</li> </ul>
Subgroup Input	The proponent is obtaining adequate input from community subgroups on the engagement plan.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in at Planning phase (or earlier).	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why is that?</li> <li>• What is adequate input to community subgroups?</li> </ul>
Engagement Plan Expectations	The engagement plan is meeting the community's participation expectations.	Empower/Collaborate/Involve/Consult/Inform  (See Appendix B for link to IAP2 Engagement Spectrum.)  Check in at Planning phase (or earlier).	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What level of participation does the community wish?</li> <li>• What level of participation does the community have capacity and skills for? (See Capacity Building/Training.)</li> </ul>
Monitoring Expectations	The monitoring plans are meeting the community's participation expectations.	Empower/Collaborate/Involve/Consult/Inform  (See Appendix B for link to IAP2 Engagement Spectrum.)  Check in at Impact Assessment, Decision-Making, and Post Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What level of participation does the community wish?</li> <li>• What level of participation does the community have capacity and skills for? (See Capacity Building/Training.)</li> </ul>
Proponent Capacity	The community's engagement expectations align with the proponent's engagement capacity.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What is the proponent's engagement capacity?</li> </ul>
Community Input Integration	Community input is being integrated effectively into project planning and design for all phases of the project's life cycle (as applicable).	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What is effective integration to the community?</li> </ul>

## Indigenous Knowledge

Indicator category	Indicator	Metric	Clarification questions
Indigenous Knowledge	Indigenous knowledge is being integrated effectively into the project planning and design for all phases of the project's life cycle (as applicable).	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What is effective integration to the community?</li> </ul>

## **B** Trust and Accountability

Indicator category	Indicator	Metric	Clarification questions
Trust	Rank the level of trust between the proponent and community.  (Note: This indicator can be answered by both the proponent and the community.)	Scale of 1 to 5  Check in during all 5 phases of assessment and track over time.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If low, how do you build trust?</li> </ul>
Proponent Consistency	The proponent is engaging with the community in a consistent and timely manner.	Always/Most of the time/Some of the time/Rarely  Check in during all 5 phases of assessment and track over time.	<ul style="list-style-type: none"> <li>• What is timely and consistent for the community?</li> <li>• If some of the time or rarely, why is that?</li> </ul>
Community Consistency	The community is responding to the proponent in a timely and consistent manner.  (Note: This indicator can be answered by the proponent.)	Always/Most of the time/Some of the time/Rarely  Check in during all 5 phases of assessment and track over time.	<ul style="list-style-type: none"> <li>• What is timely and consistent for the proponent?</li> <li>• If some of the time or rarely, why is that?</li> <li>• (Note: If it's an issue of community capacity, see Section D below on Capacity Building/Training for Engagement.)</li> </ul>

## C Inclusion and Equity

Indicator category	Indicator	Metric	Clarification questions
Minority Groups	The engagement plan is adequately incorporating strategies to engage marginalized and minority groups (e.g., women, non-binary people, Indigenous people, LGBTQ+ people, people with disabilities, visible minorities).	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning phase (or earlier).	<ul style="list-style-type: none"> <li>Why? Explain your score.</li> <li>What are adequate strategies for engaging these groups?</li> <li>Are these strategies being realized throughout all 5 phases of impact assessment?</li> </ul>
Most Impacted	The engagement plan is adequately incorporating strategies to engage community members most impacted by the project.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning phase (or earlier)	<ul style="list-style-type: none"> <li>Why? Explain your score.</li> <li>What are adequate strategies for engaging these groups?</li> <li>Are these strategies being realized throughout all 5 phases of assessment?</li> </ul>
Diverse Representation	The proponent's engagement team includes diverse representation (e.g., women, non-binary people, Indigenous people, people with disabilities, visible minorities).	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning phase (or earlier).	<ul style="list-style-type: none"> <li>Why? Explain your score.</li> <li>What percentage for all that apply?</li> </ul>
Community Liaison Diversity	The proponent's community liaison(s) reflect the diversity of the community.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning phase (or earlier).	<ul style="list-style-type: none"> <li>Why? Explain your score.</li> <li>What percentage for all that apply?</li> </ul>
Advisory Committee Diversity	The advisory committee reflects the diversity of the community, including those most impacted by the project.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning phase (or earlier).	<ul style="list-style-type: none"> <li>Why? Explain your score.</li> <li>What percentage for all subgroups that apply?</li> </ul>
Addressing Barriers	The engagement plan includes strategies to address barriers to participation (e.g., people living with disabilities, or who face other social, cultural, or economic barriers).	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning phase (or earlier).	<ul style="list-style-type: none"> <li>Why? Explain your score.</li> <li>What are appropriate strategies to address these barriers?</li> <li>Are these strategies being realized throughout all 5 phases of assessment?</li> </ul>

## Inclusion of Indigenous Subgroups

Indicator category	Indicator	Metric	Clarification questions
Indigenous Subgroup Representation	<p>The community engagement plan adequately considers the engagement needs of:</p> <ul style="list-style-type: none"> <li>• Elders</li> <li>• Elected Indigenous representatives</li> <li>• Hereditary Chiefs</li> <li>• hunters and trappers</li> <li>• harvesters</li> <li>• women</li> <li>• community members</li> <li>• youth and young adults</li> <li>• other groups within the community</li> </ul>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree (for each).</p> <p>Check in during Planning phase (or earlier).</p>	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What does it look like to consider the engagement needs for these groups?</li> </ul>

## **D** Capacity Building/Training for Engagement

Indicator category	Indicator	Metric	Clarification questions
Community Capacity	There has been an assessment of the community's capacity and readiness for participating in the community engagement process.	<p>Yes/No/Not Applicable</p> <p>Check in during Planning phase (or earlier).</p>	<ul style="list-style-type: none"> <li>• If no, why not?</li> <li>• How can the community and proponent work together to assess?</li> </ul>
Existing Barriers	There are existing challenges/barriers that need to be addressed.	<p>Yes/No</p> <p>Check in during Planning phase (or earlier).</p>	<ul style="list-style-type: none"> <li>• If yes, explain your score.</li> <li>• How might these be addressed?</li> </ul>
Training	There are adequate training opportunities for the engagement process.	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases.</p>	<ul style="list-style-type: none"> <li>• If disagree, why not?</li> <li>• What does adequate look like to the community?</li> </ul>
Capacity Funding	The community requires funding support or technical expertise/resources to effectively and meaningfully participate in the engagement process.	<p>Yes/No</p> <p>Check in during Planning phase (or earlier).</p>	<ul style="list-style-type: none"> <li>• If yes, what funding or expertise is available?</li> <li>• Have arrangements been made to provide funding or expertise?</li> <li>• See Appendix B for links to IAAC's Participant Funding Programs</li> </ul>

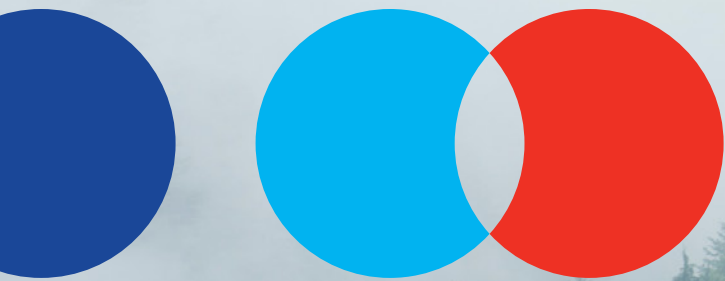


## **E** Communication and Accessibility

Indicator category	Indicator	Metric	Clarification questions
Project Definition	The project and its purpose are clearly defined.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during all 5 phases of assessment and track over time.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What efforts are the proponent making to explain the project in various ways and media (e.g., maps, videos, or computer simulations).</li> </ul>
Adequately Informed	The community and its subgroups are adequately informed about the project by the proponent.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during all 5 phases of assessment and track over time.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What does being adequately informed look like?</li> </ul>
Two-Way Communication (Community)	The community rates the level of two-way engagement with the proponent.	Scale of 1 to 5  Check in during all 5 stages of assessment and track over time.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If low, why is that?</li> </ul>
Two-Way Communication (Proponent)	The proponent rates the level of two-way engagement with the community.	Scale of 1 to 5  Check in during all 5 phases of assessment and track over time.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If low, why is that?</li> <li>• (Note: If it's an issue of community capacity, see Section D above on Capacity Building/Training for Engagement.)</li> </ul>
Plain Language Reports	Project materials and reports are provided in advance and in plain language.	Always/Most of the time/Some of the time/Rarely  Check in during all 5 phases of assessment.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If some of the time or rarely, why is that?</li> </ul>
Plain Language Presentations	Presentations about the project are delivered in plain language (e.g., in meetings, public consultation sessions).	Always/Most of the time/Some of the time/Rarely  Check in during Planning, Impact Statement, Impact Assessment and Post-Decision phases	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If some of the time or rarely, why is that?</li> </ul>
Translation	Project materials and reports are translated into the language of local community members.	Always/Most of the time/Some of the time/Rarely  Check in during all 5 phases of assessment.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If some of the time or rarely, why is that?</li> </ul>
Technical Barriers	The engagement plan includes strategies to address technical barriers to engagement (e.g. slow/lack of internet access).	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning phase (or earlier).	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• Are these strategies being realized over all 5 phases of assessment? Why or why not?</li> </ul>
Timely Feedback	Engagement results and feedback are available in an accessible and timely way.	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during all 5 phases of assessment.	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• What does accessible and timely look like?</li> </ul>

## Section 3

# Climate Action: Linking Projects to Net Zero Targets





## Canada's ability to meet its international climate obligations in reducing emissions and transitioning to a net zero economy is important to both communities and proponents.

A new major project can impact a local community's net zero goals and in turn, impact the provincial/territorial<sup>4</sup> and national climate action plans. Dialogue at the local community level between proponents and communities are needed to promote collaborative actions towards net zero.

### The following indicators fall under two sub-sections:

- A** Local Community Climate Action Plans and Net Zero Targets
- B** Federal Climate Action Plans and Net Zero Targets



## Keep in Mind

Emissions may not be a priority for all communities. Some rural, remote, and Northern communities have been excluded from socio-economic development. For these communities, other priorities loom large. Questions of alleviating poverty, food security, provision of adequate social services and infrastructure, and attracting employment and economic development will be of critical importance.

Be realistic about your community's priorities and capacities. Some or none of these will be relevant to your community's situation.

<sup>4</sup> For provincial/territorial climate action plans, please refer to the relevant regulations.

## A Local Community Climate Action Plans and Net Zero Targets

Indicator category	Indicator	Metric	Clarification questions
Community Climate Action	The project is designed to help the community strengthen and meet its climate action goals (if practical).	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, and Impact Assessment phases	<ul style="list-style-type: none"> <li>Why? Explain your score.</li> <li>If disagree, why not?</li> </ul>
Project-Based Climate Actions	<p>The proponent is adequately consulting the community on the following impacts to climate action: (Choose all that apply)<sup>5</sup></p> <ul style="list-style-type: none"> <li>greenhouse gas (GHG) emissions</li> <li>impacts to carbon sinks (e.g. forests, oceans or other natural environments)</li> <li>GHG mitigation measures</li> <li>best available (low-emission) technologies/ best environmental practices</li> <li>climate change resilience</li> <li>use of GHG offsets</li> </ul>	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree (Rate separately for each that apply)</p> <p>Check in during Planning, Impact Statement, Impact Assessment and Post-Decision phases</p>	<ul style="list-style-type: none"> <li>Why does your community think this?</li> <li>When are they consulting?</li> <li>How are they consulting?</li> <li>What is adequate consultation to the community?</li> <li>How will these impacts/benefits be measured and monitored?</li> </ul>
Net Zero 2050	If the project will operate until or beyond 2050, the project is designed to achieve net zero GHG emissions over its lifecycle.	<p>Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree</p> <p>Check in during Planning, Impact Statement, Impact Assessment and Post-Decision phases</p>	<ul style="list-style-type: none"> <li>If disagree, what are the anticipated GHG emissions over the project lifetime?</li> <li>What legitimate GHG offsets (permanent new sequestration) should be considered for net lifetime GHG calculations?</li> <li>How will GHG emissions be measured and monitored?</li> <li>How do actual emissions in post-decision compare to anticipated emissions?</li> </ul>

(continued ...)

<sup>5</sup> For more information, consult the Government of Canada's Strategic Assessment of Climate Change, <https://www.canada.ca/en/services/environment/conservation/assessments/strategic-assessments/climate-change.html#toc1>.

Lifecycle Emissions	If the project will not operate until or beyond 2050, the project is designed to lower GHG emissions over time or use best available (low-emission) technology (if practical).	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment and Post-Decision phases	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• Is the scale of emissions acceptable when balanced against social and economic impacts/benefits to community well-being? Is the project in the community interest?</li> <li>• How will GHG emissions be measured and monitored?</li> <li>• How do actual emission reductions in post-decision compare to emission reduction plans?</li> </ul>
Energy Intensity	The project design includes strategies to reduce energy intensity (If practical).	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment and Post-Decision phases	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> <li>• How will energy intensity reductions be measured and monitored?</li> <li>• How do actual energy intensity reductions in post-decision compare to energy intensity reduction plans?</li> </ul>

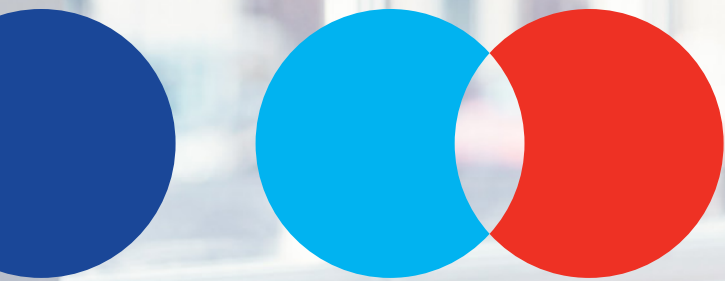
## **B** Federal Climate Action Plans and Net Zero Targets

Indicator category	Indicator	Metric	Clarification questions
Federal Climate Action	The project is designed to contribute to meeting Canada's federal GHG emission reduction targets (if practical)	Strongly Agree/Agree/Somewhat Agree/Somewhat Disagree/Disagree/Strongly Disagree  Check in during Planning, Impact Statement, Impact Assessment, and Post-Decision phases	<ul style="list-style-type: none"> <li>• Why? Explain your score.</li> <li>• If disagree, why not?</li> </ul>



## Section 4

# Evaluation





## Indicators and metrics have been chosen. Now what?

Proponents and communities should:

- agree on indicators to be included in the community engagement plan
- confirm the metrics to assess each indicator's performance
- schedule periodic check-ins to reassess metrics
- continually seek to clarify inputs for each indicator
- set clear expectations about how indicators will be met

### Questions to Ask:

- **Are both parties still feeling things are on track?**
- **What is working well?**
- **What should we do differently?**
- **What needs to be adjusted going forward?**
- **What happened differently than anticipated?**
- **What are the lessons learned?**

### A Final Note

Engagement is never easy. This playbook is a tool to help communities and proponents navigate the complex process of co-creating a community engagement plan that is tailored to a community's unique values and needs. All participants can return to the playbook again and again to adopt or adapt the metrics to support their unique outcomes, to ensure meaningful and substantive engagement continues throughout the life of the project.



## Keep in Mind

Ongoing evaluation of the community engagement plan is key. This is especially important when there is a change of ownership of the project.

The chosen indicators and overall engagement plan should change as necessary.

# Appendix A

# Glossary of Terms

## Community

The term “communities” represents more than municipal governments. It refers to the network of individuals, institutions, and organizations that interact within a territory whose boundaries can be loosely delineated by a smaller-than-provincial/territorial form of government, a coherent economy, and a network of infrastructure. Communities are characterized by their size, a form of local government (may include regions, cities, townships, hamlets, reserves/settlement areas, etc.), as well as resources and capacities the individuals, institutions, and organizations possess and manage to deliver services and goods to this community. This means that Canada’s communities are diverse.<sup>6</sup>

## Indicators

Indicators are the specific facts or values that help provide communities with insight into the state of the key engagement factors.

## Metrics

Metrics are the specific measure attributed to a community’s response to an indicator.

## Net-Zero

Net-Zero emissions mean that anthropogenic emissions of greenhouse gases (GHG) into the atmosphere are balanced by anthropogenic removals of GHGs from the atmosphere over a specified period. Canada’s net-zero commitment includes all GHGs and is geographically bound to emissions generated within Canada across all sectors.<sup>7</sup>

<sup>6</sup> Definition from *All Net-Zero Pathways Begin With a Local Step*, <https://questcanada.org/project/blog-diversepathways/>.

<sup>7</sup> Ibid.

# Appendix B

# Community Engagement Resources

## Community Engagement Best Practices

- First Nations Major Projects Coalition Guide to Effective Indigenous Involvement: [https://secureservercdn.net/45.40.145.201/14x.5f4.myftpupload.com/wp-content/uploads/2021/03/FNMPC\\_Guide\\_Oct15202\\_FINAL.pdf](https://secureservercdn.net/45.40.145.201/14x.5f4.myftpupload.com/wp-content/uploads/2021/03/FNMPC_Guide_Oct15202_FINAL.pdf).
- Prospectors & Developers Association of Canada Community Engagement Guide: <https://www.pdac.ca/priorities/responsible-exploration/e3-plus/community-engagement-guide/introduction>.
- UNESCO's Best Practices for Indigenous Engagement: <https://en.ccunesco.ca/-/media/Files/Unesco/Resources/2019/08/BestPracticesForIndigenousEngagementGeoparks.pdf>.
- UNICEF Minimum Quality Standards and Indicators for Community Engagement: <https://www.unicef.org/mena/reports/community-engagement-standards>.

## International Association of Public Participation (IAP2) Resources

- IAP2 Core Values for the Practice of Public Participation: <https://iap2canada.ca/foundations>.
- IAP2 Spectrum: [https://iap2canada.ca/resources/Documents/IAP2%20Canada-Foundations-Spectrum\\_revised\\_june\\_orange.pdf](https://iap2canada.ca/resources/Documents/IAP2%20Canada-Foundations-Spectrum_revised_june_orange.pdf).
- Challenges and Advancements in Evaluating Public Participation: <https://drive.google.com/file/d/0B-X3U0XoYSsfTTJIYkJXQ25LaDQ/view?usp=sharing&resourcekey=0-Xxzh-cz1prjX-OaQ-iwvnw>.

## Impact Assessment Agency of Canada (IAAC) Public and Indigenous Participation Guidelines

- Guidance: Public Participation under the *Impact Assessment Act*: <https://www.canada.ca/en/impact-assessment-agency/services/policy-guidance/practitioners-guide-impact-assessment-act/guidance-public-participation-impact.html>.
- Guidance: Indigenous Participation under the *Impact Assessment Act*: <https://www.canada.ca/en/impact-assessment-agency/services/policy-guidance/practitioners-guide-impact-assessment-act/guidance-indigenous-participation-ia.html>.

## IAAC Participant Funding Programs

- Participant Funding Program: <https://www.canada.ca/en/impact-assessment-agency/services/public-participation/funding-programs/participant-funding-program.html>.
- Indigenous Capacity Support Program: <https://www.canada.ca/en/impact-assessment-agency/services/public-participation/funding-programs/indigenous-capacity-support-program.html>.

## Indigenous Priorities and Initiatives<sup>8</sup>

- Truth and Reconciliation Commission's (TRC) Calls to Action: [https://www2.gov.bc.ca/assets/gov/british-columbians-our-governments/indigenous-people/aboriginal-peoples-documents/calls\\_to\\_action\\_english2.pdf](https://www2.gov.bc.ca/assets/gov/british-columbians-our-governments/indigenous-people/aboriginal-peoples-documents/calls_to_action_english2.pdf).
- United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP): [https://www.un.org/esa/socdev/unpfii/documents/DRIPS\\_en.pdf](https://www.un.org/esa/socdev/unpfii/documents/DRIPS_en.pdf).
- Recommendations from the National Inquiry on Missing and Murdered Indigenous Women and Girls (MMIWG): <https://www.mmiwg-ffada.ca/wp-content/uploads/2019/06/National-Inquiry-Master-List-of-Report-Recommendations-Organized-By-Theme-and-Jurisdiction-2018-EN-FINAL.pdf>.
- Final report from the National Inquiry on MMIWG: <https://www.mmiwg-ffada.ca/final-report/>.
- Inuit Tapiriit Kanatami's (ITK) 2020–2023 Strategy and Action Plan: <https://www.itk.ca/wp-content/uploads/2020/05/2020-2023-ITK-Strategy-and-Action-Plan-English-FINAL.pdf>.
- Pauktuutit's (Inuit Women's Association) Literature Review on Ensuring the Safety and Well-Being of Inuit Women in the Resource Extraction Industry: <https://www.pauktuutit.ca/wp-content/uploads/Litterature-Review-V9-updated.pdf>.
- Pauktuutit's Report Addressing Inuit Women's Economic Security and Prosperity in the Resource Extraction Industry: [https://www.pauktuutit.ca/wp-content/uploads/Addressing-Inuit-Womens-Economic-Security-Prosperity\\_Mar302021.pdf](https://www.pauktuutit.ca/wp-content/uploads/Addressing-Inuit-Womens-Economic-Security-Prosperity_Mar302021.pdf).



<sup>8</sup> Note: These are examples of Indigenous priorities and initiatives, not an exhaustive list. There may be other priorities and initiatives as well as historic treaties and modern land-claim agreements that are more relevant to your community's context.

# Appendix C

# Links to GRI and UNSDGs

The indicators can be linked to proponents' environmental, social, and governance (ESG) strategies and communities' sustainable development goals. The following tables link each of the three sections of indicators and their subsection to relevant Global Reporting Initiative (GRI) Disclosures and United Nations Sustainable Development Goals (UNSDGs).

Strong commitments to meaningful community engagement through the impact assessment process can help advance big picture goals like ending poverty, protecting the environment, and enhancing social and economic well-being to benefit present and future generations. It can also assist a proponent's valuation, access to capital, and reputation.

GRI is used as an illustration. It was chosen for its strong commitment to social disclosures, in addition to economic and environmental ones. But strong community engagement practice can be used to provide additional granularity for any ESG framework.

## Section 1: Measuring Community Impacts – Defining Project Impacts and Benefits

Indicator subsection	Relevant GRI disclosure	Relevant UNSDGs
A. Community and Social Well-Being	<ul style="list-style-type: none"> <li>• GRI 2-22</li> <li>• GRI 2-23</li> <li>• GRI 2-25</li> <li>• GRI 3-1</li> <li>• GRI 203</li> <li>• GRI 413</li> </ul>	<ul style="list-style-type: none"> <li>• SDG 3</li> <li>• SDG 5</li> <li>• SDG 9</li> <li>• SDG 11</li> </ul>
B. Economic Well-Being	<ul style="list-style-type: none"> <li>• GRI 2-7</li> <li>• GRI 202</li> <li>• GRI 401</li> <li>• GRI 405</li> </ul>	<ul style="list-style-type: none"> <li>• SDG 5</li> <li>• SDG 8</li> <li>• SDG 11</li> </ul>
C. Environmental Well-Being	<ul style="list-style-type: none"> <li>• GRI 2-23</li> <li>• GRI 2-25</li> <li>• GRI 2-29</li> <li>• GRI 3-1</li> <li>• GRI 301</li> <li>• GRI 302</li> <li>• GRI 303</li> <li>• GRI 304</li> <li>• GRI 305</li> <li>• GRI 306</li> <li>• GRI 413</li> </ul>	<ul style="list-style-type: none"> <li>• SDG 3</li> <li>• SDG 6</li> <li>• SDG 7</li> <li>• SDG 11</li> <li>• SDG 12</li> <li>• SDG 13</li> <li>• SDG 14</li> <li>• SDG 15</li> </ul>

## Section 2: Measuring Community Engagement – Assessing the Engagement Process

Indicator subsection	Relevant GRI disclosures	Relevant UNSDGs
A. Empowerment, Ownership, and Meaningful Engagement	<ul style="list-style-type: none"> <li>• GRI 2-22</li> <li>• GRI 2-23</li> <li>• GRI 2-25</li> <li>• GRI 2-29</li> <li>• GRI 3-1</li> <li>• GRI 411</li> </ul>	<ul style="list-style-type: none"> <li>• SDG 10</li> <li>• SDG 13</li> <li>• SDG 14</li> <li>• SDG 15</li> </ul>
B. Trust and Accountability	<ul style="list-style-type: none"> <li>• GRI 2-29</li> </ul>	
C. Inclusion and Equity	<ul style="list-style-type: none"> <li>• GRI 2-23</li> <li>• GRI 2-29</li> <li>• GRI 202</li> <li>• GRI 401</li> <li>• GRI 405</li> <li>• GRI 413</li> </ul>	<ul style="list-style-type: none"> <li>• SDG 10</li> </ul>
D. Capacity Building/Training for Engagement	<ul style="list-style-type: none"> <li>• GRI 2-29</li> <li>• GRI 413</li> </ul>	
E. Communication and Accessibility	<ul style="list-style-type: none"> <li>• GRI 2-29</li> <li>• GRI 413</li> </ul>	



### Section 3: Measuring Climate Action – Linking Projects to Net Zero Targets

Indicator subsection	Relevant GRI disclosure	Relevant UNSDGs
A. Local Community Climate Action Plans and Net Zero Targets	<ul style="list-style-type: none"><li>• GRI 2-22</li><li>• GRI 302</li><li>• GRI 305</li></ul>	<ul style="list-style-type: none"><li>• SDG 13</li></ul>
B. Federal Climate Action Plans and Net Zero Targets	<ul style="list-style-type: none"><li>• GRI 302</li><li>• GRI 305</li></ul>	<ul style="list-style-type: none"><li>• SDG 13</li></ul>

For more information and the full set of GRI Standards:  
<https://globalreporting.org/standards/>.

For a detailed breakdown and the full set of UNSDGs:  
<https://sdgs.un.org/goals>.

# Appendix D

# Methodology

The Conference Board of Canada began the project with a literature review of federal assessments of major projects and associated proponent–community engagement practices, literature on community engagement best practice, Indigenous engagement frameworks, and sustainability assessment best practice.

To gain strategic insights into engagement concerns and recommendations, nine regional engagement workshops were held virtually in the fall of 2021:

- September 8 – Multi-Stakeholder Prairies
- September 9 – Multi-Stakeholder Territories
- September 14 – Multi-Stakeholder Atlantic Canada
- September 16 – Multi-Stakeholder Quebec (in French)
- September 28 – Multi-Stakeholder Ontario
- October 5 – Indigenous Territories
- October 6 – Multi-Stakeholder British Columbia
- October 12 – Indigenous Atlantic Canada and Quebec
- October 14 – Indigenous Ontario and Western Canada

## Contact Development and Communication

Criteria for invited guests focused on leadership representation from a cross-section of regional stakeholders. Six regional workshops were multi-stakeholder sessions that brought together community organizations, Indigenous representatives, non-governmental organizations (NGOs), impact assessment practitioners, academic experts, industry, and all three levels of government. Three workshops were designed to ensure Indigenous contexts and the effects of major projects on traditional territories, practices, livelihoods, and culture; linkages to treaty rights; and the significance of social and economic benefits were well represented. We used web-

based and internal database searches, as well as direct contact, to identify guests from these stakeholder categories.

Invited guests included:

- vice-presidents and directors of community and Indigenous relations from industry;
- professors of impact assessment practice and environmental management;
- senior environmental and socio-economic consultants;
- chiefs, directors of community outreach, and lands directors from Indigenous governments;
- health and resource development advisors from regional health authorities;
- executive directors from NGOs;
- presidents and directors of community initiatives at community foundations;
- mayors, chief administrative officers, and economic development and environmental planning managers from municipal governments affected by major projects;
- First Nations liaisons and senior policy analysts from provincial and federal government departments.

E-mails were sent four weeks before each event, with follow-up e-mails two weeks and one week before each event. E-mail campaigns were supplemented with direct phone calls and direct follow-up e-mail appeals to contacts. The reminder e-mails sent to confirmed guests included a backgrounder that provided context on community engagement in the impact assessment process, long-term monitoring, and the purpose and outcomes of our regional consultation workshops.

Seventy-seven people, representing 68 unique organizations, participated in nine regional engagement workshops held virtually across Canada. A total of 487 people from 424 organizations were contacted.

## Workshop Structure

A PowerPoint presentation introduced key concepts, provided an overview of the project, and presented themes for discussion. Following participant introductions, the remaining workshop was split into two themed discussions on community engagement and long-term monitoring.

Each two-hour workshop included a Chatham House Rule declaration and explanation, an acknowledgement of Indigenous territory, a presentation, participant introductions, and two 45-minute discussion sessions.

The Conference Board of Canada's team facilitated or co-facilitated five English-language multi-stakeholder workshops and three Indigenous regional workshops. One French multi-stakeholder workshop was facilitated in Quebec.

## Playbook Validation

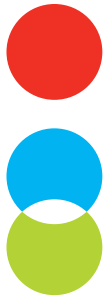
The results of the workshops served as key inputs. Semi-structured, in-depth validation interviews were conducted to further understand the community engagement issues, review the draft playbook, and test indicator themes and metrics. The Conference Board of Canada engaged the same broad cross-section of regional stakeholders from the workshops. Written responses were also received. A total of 15 interviews were conducted with 18 participants.

A focus group pilot was undertaken in February 2022 to test the playbook and understand how proponents and community groups would use the tool. The Conference Board of Canada engaged a proponent experienced with community engagement who nominated community groups with whom it had existing relationships. A total of six participants took part.

We acknowledge the contributions of all workshop participants, reviewers, interviewees, and focus group participants. The participation of these individuals and organizations does not constitute an endorsement or responsibility for the content contained in the final playbook. A full list of participants who granted permission to be included is listed below.

## Playbook Reviewers, Interview, and Focus Group Participants

Name	Title	Organization
Lori Ackermann	Mayor	City of Fort St. John, B.C.
Gordon Borgstrom	–	–
Alex Buchan	Director, Western Nunavut Affairs	Agnico Eagle Mines Ltd.
Jennifer Chamberlin	Manager, Community Planning	Saskatchewan Association of Rural Municipalities (SARM)
Cheryl Chetkiewicz	Conservation Scientist	Wildlife Conservation Society of Canada
Patricia Fitzpatrick	Professor, Geography	University of Winnipeg
Robert B. Gibson	Professor, Environment, Resources and Sustainability	University of Waterloo
Kevin Hanna	Professor, Earth, Environmental and Geographic Sciences	UBC Okanagan
Suzanne Leclair	Senior Advisor, Stakeholder Relations	Agnico Eagle Mines Ltd.
Jim MacEachern	Executive Director	Kitikmeot Chamber of Commerce
Krista Maydew	Director, Community Relations	IAMGOLD Corporation
Graeme Morin	Scientific Consultant	James Bay Advisory Committee on the Environment (JBACE)
Barbara Oke	Health and Resource Development Technical Advisor	BC Northern Health
Jamie Quesnel	Director, Permitting and Regulatory Affairs	Agnico Eagle Mines Ltd.
Angel Ransom	Director, Environmental Services	First Nations Major Projects Coalition
Craig Reid	Senior Advisor	Association of Municipalities of Ontario (AMO)
Paula Tait	Health and Resource Development Technical Advisor	BC Northern Health
Peter Tapatai	–	Hamlet of Baker Lake, Nunavut
Peter Taptuna	Senior Advisor, Lands Division (Past Premier of Nunavut)	Kitikmeot Inuit Association
Josh Thompson	Manager, Outreach and Stakeholder Engagement	BC Environmental Assessment Office
Sally Western	Technical Advisor	BC Northern Health
Tomasz Włodarczyk	Senior Advisor, Environmental Management, Planning and Approvals	SLR Consulting



## Acknowledgements

This research was prepared with financial support from the Impact Assessment Agency of Canada.

The following members of The Conference Board of Canada contributed to the research: Colin Brown, Marta Bristow, Gillian Kerr, Stefan Fournier, and Twiladawn Stonefish. Additional team members from the Conference Board contributed facilitation, administration, interview, and review activities: Pedro Antunes, Bryan Benjamin, Kathryn Dougherty, Roger Francis, Brett Goodwin, Andrea Nadeau, and Chantal Pye.

We thank the numerous individuals who took the time to participate in this research as workshop participants, reviewers, interviewees, and focus group participants.

### **Strong Engagement, Strong Outcomes: An Engagement Indicators Playbook**

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To cite this research: Brown, Colin, Marta Bristow, and Gillian Kerr. *Strong Engagement, Strong Outcomes: An Engagement Indicators Playbook*. Ottawa: The Conference Board of Canada, 2022.

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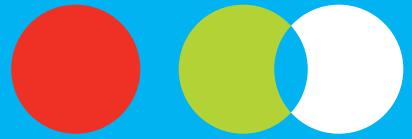
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