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IMT
INSTITUTE
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TRANSFORMATION

COMMUNITY ENGAGEMENT

Process Guide

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ABOUT IMT

The Institute for Market Transformation (IMT) is a national nonprofit organization focused on increasing energy efficiency in buildings to save money, drive economic growth and job creation, reduce harmful pollution, and tackle climate change. IMT ignites greater investment in energy-efficient buildings through hands-on expert guidance, technical and market research, policy and program development and deployment, and promotion of best practices and knowledge exchange. For more information, visit **imt.org**.

CONTENTS

INTRODUCTION

The Community Engagement (CE) Framework Process Guide was created to guide Institute for Market Transformation (IMT) staff in implementing the **Community Engagement** (CE) **Framework.**

While the CE Framework describes the foundational approach to IMT's engagement with communities, the process guide outlines a set of objectives, tactics, guidelines, and templates that serve to guide staff on how to implement the framework through IMT's four primary programmatic areas: public policy, commercial real estate, utility and grid regulation, and community engagement.

This process guide will also:

- Help readers understand that IMT's approach to engaging communities is more than a set of strategies to deploy, but is a process of engagement with communities on the frontlines of climate change
- Guide readers in taking intentional steps over time to reach co-developed goals and outcomes toward equitable transformation
- Prepare readers on how to engage with community-based organizations and frontline communities through relationship-building, community agreements, and co-development models to advance community-driven solutions

More than a framework: A process

In order to achieve the goals to transform, balance and close gaps between community, government, real estate, and utility decision-makers, we must expand the focus of our work beyond buildings to include community-centered priorities for the infrastructure in their communities. Rather than a mere set of strategies to deploy, this is a process of engagement that takes time, intention, transparency, and consistency with communities experiencing the "first and worst" effects of climate change. The efforts described in this document will help to guide IMT in its engagement efforts to advance community-driven solutions.

WHY FRONTLINE COMMUNITIES?

The Community Engagement Framework (CE Framework) aims to answer the calls to action of communities at the frontline of the climate crisis. Frontline leaders seek to implement a Just Transition in their communities, therefore IMT's CE Framework is also rooted in the principles of a Just Transition and follows the lead of this movement.

Communities of color, people with lower incomes, and indigenous people are on the frontlines of climate and environmental change. Frontline communities are those that experience "first and worst" the consequences of climate change. These are communities of color, Native communities, immigrants, undocumented people, and people of low–income, whose neighborhoods often lack basic infrastructure to support them, whose resources have been exploited, whose daily work or living environments are polluted or toxic, and who will be increasingly vulnerable as our climate deteriorates.[1]

> Recognizing the connection between environmental justice and climate change effects is a crucial step in facilitating a framework that addresses climate change within all communities, and furthermore in reducing the systemic racism that exists in our current policy framework that supports market-based exploitation.
>
> **Natural Resources Defense Council (NRDC)**

[1] **Ecotrust**

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Section 1:

Applying the Framework

WHAT DOES IMPLEMENTING THE FRAMEWORK LOOK LIKE?

As IMT begins to expand its belief in the power of buildings to include aspects of social, climate, and environmental justice and equity, the Community Engagement Team designed the following framework, tools, tactics, and evaluation methods to follow. Please note: While our goals and core objectives do not change, tactics are malleable and expected to change as we achieve our goals over time.

> "Black, Native American, Indigenous and People of Color communities and immigrant and low-income communities that historically and presently experience the brunt of health, economic and ecological impacts and have been made more vulnerable to the consequences of climate change because of these factors."
>
> **EcoTrust**

MISSION

The mission for community engagement at IMT is to drive the co-development of energy efficiency and climate solutions that identify and address the challenges, priorities, and aspirations of frontline communities through meaningful community engagement.

VALUES

The mission is supported by eight values that are non-negotiable for community engagement at IMT:

1 **Act in solidarity.** Have empathy and humanize energy efficiency in a way in which everyone understands that these issues impact the livelihood of real people.

2 **Advocate for transformative solutions.** Make the case for cities to collaborate with community.

3 **Be justice- and issue-informed.** Clearly understand the issues we are talking about and the language we are usng so that we are intentional in our work.

4 **Use our power for good.** Use our influence and resources to challenge the status quo in systems that marginalize communities.

5 **Be intentional.** Develop long term strategies for community engagement so that we aren't rushed or stumbling in our steps.

6 **Be integrated.** Clear communication between IMT staff on programs and projects, as well as clear communication between policy leads and the Community Engagement team.

7 **Strategize before acting.** Avoid shortcuts and prioritize research and planning before engaging with communities or making commitments to partners.

8 **Foster a culture of care.** Care for each other as colleagues first and foremost, so we can process and heal before engaging with others.

GOALS

Frontline communities experience real and disproportionate type of violence from the climate crisis and are being left out of the policymaking process. Communities often know the solutions to the issues they're facing but lack the political, economic, and technical resources needed to make their voices heard. The CE team has outlined three major goals to help hold IMT accountable to shifting how the organization works with communities and governments: **Transform, Balance, and Close Gaps.**

Overall, this means that we do not take pre-defined solutions into frontline communities, but rather engage community members early-on, and follow their lead in co-developing the process.

TRANSFORM

Make the policy-making process more accessible to communities at the national organization level and transform the slow violence that is inherent in an overly technical process.

BALANCE

Balance uneven power dynamics in our energy-related policy work by leveraging and redistributing our resources and power.

CLOSE GAPS

Close the gaps in climate vulnerability through direct participation of affected communities.

TRANSFORM

Make the policy-making process more accessible to communities at the national organization level and transform the slow violence that is inherent in an overly technical process.

The slow violence perpetrated in an overly technical process results in the very real loss of health and human life. It happens when policies and systems are made inaccessible and out of reach to those who are most impacted by them.

To avoid this, people and organizations must not parachute into a community with a policy plan but rather engage the community early in a policy-making process, and follow the lead of the community in the co-development of that process. In order to achieve the goal above, IMT has identified the following objectives and tactics to employ:

Table 1: Objectives for transformation

OBJECTIVES	TACTICS	EXAMPLES
1. Subvert the "Expert Paradigm": Reconsider who is deemed an "expert" and establish those with lived experience as authoritative	Acknowledge expertise of community and make their knowledge and lived experience primary	Regularly feature partner organizations, key staff and categories of expertise on our webpage In meetings and convenings, hold space for community members by acknowledging community presence and expertise
	Identify IMT's influence and expertise to shift imbalances, with the community as the audience	Conduct Power Analysis exercises, identify spheres of influence, and integrate targeted strategy into organization-wide planning **Power mapping example**
	Work with national environmental justice partners in pursuing the goals of major programs and projects, such as **Community Climate Shift**	

OBJECTIVES	TACTICS	EXAMPLES
2. Acknowledge past harm and support active work to rebuild trust	Identify IMT's expertise and the limits of that expertise in relation to community goals	Conduct internal gap analyses to identify who our work is impacting and in what ways, in addition to who we want to impact and how in IMT's "Strategic Conversations" quarterly series
	Foster an understanding of climate justice concepts so that staff embody and remain accountable to IMT's commitments to community and equity	Read and implement CE Process Guide
		Each program sector (Policy, Real Estate, Utilities, Community Engagement) and operational team (Leadership, Admin & Operations) at IMT identifies learning opportunities that intersect equity with with their work
	Quarterly review place-based projects for each of IMT's areas of focus and assess community inclusion, opportunities missed, as well as engagement efforts done well	At quarterly meetings, report out on impact assessments, reflections and conversations with community around improvements and best practices, if applicable
3. Develop increasing competence in understanding the social impacts of our energy–related work	Conduct baseline Racial Equity Impact Assessment (REIA) in each place-based project	**DC Racial Equity Impact Assessment** (Source: District of Columbia Council Office of Racial Equity)
		How to design racially equitable legislation for residents of DC (Source: District of Columbia Council Office of Racial Equity)
	Collaborate with local and/or national partners trained to perform analyses	**All–In Cities** (Source: PolicyLink)
4. Create space for peer–learning between CBO partners, and make concepts accessible and easy to understand	Develop a learning series, with and for CBOs	Present case studies and IMT's work for organizations part of the **Justice40 Accelerator** Co-create with CBOs equitable policymaking trainings that educate policymakers and others in the real estate sector

BALANCE

Balance uneven power dynamics in our energy-related policy work by leveraging and redistributing our resources and power.

These objectives support this goal through responsible mediation and informed decision making:

Table 2: Objectives for balance

OBJECTIVES	TACTICS	EXAMPLES
1. Facilitate various stakeholders and cultivate the conditions for collaboration across sectors, while assessing and documenting progress towards practice goals and community solutions[2]	At the onset of the engagement, conduct a power analysis with community groups and the governmental partner, both separately and together	Go through the Spectrum of Community Engagement to Ownership (see Appendix D) exercise. Use this to begin conversations on how to transform the ownership process using BPS policies
	Secure a grant agreement for MOU for all place-based work that includes commitments from the City, if applicable	Grant agreement for MOU becomes a requirement for the jurisdictions we are working in; **See Orlando Letter of Commitment**
2. Establish an evaluation system 6–12 months after place-based projects to monitor impact experienced by community	At the beginning and ending of a community engagement process, host a learning session with program staff and CBOs to develop recommendations for processes & systems improvement	Refer to the CE Process Guide evaluation section. Cross reference with CE Intake form for beginning an engagement process to evaluate accomplishments and progress
	Share lessons learned and new solutions developed through external webinars, case studies, and other media	Coordinate with IMT communications team and external partners to develop webinar series

[2] Source: **SCE2O**

Table 2: Continued

OBJECTIVES	TACTICS	EXAMPLES
3. For the first 6 to 12 months of Community Climate Shift (CCS), engage community on their climate justice priorities	Ecosystem mapping of community engagement systems and communication channels identified during policy development	Conduct placed-based assessments in CCS jurisdictions
	Provide funding to CBOs so they can provide necessary resources for community participation (e.g. translation services, child care, stipends, gift cards, food, transportation)	Dedicate a significant percentage of project funding to CBOs directly
		Regularly evaluate funding to CBOs to determine if we are supporting CBOs with enough funding to accomplish their work; consider how much funds are spent on projects compared to how much CBOs and communities receive
4. Develop a scan of community-priority areas for research in CSS cities, including racial equity, health, resilience, economic inclusion, and affordable housing.	In coordination with the Social Priorities workstream, identify an existing city/neighborhood 'scan' to provide a baseline to identify areas of need for policy development	Use **YARDI**, **GEM**, and **EPA Environmental Justice (EJ) Screen** to identify EJ communities for targeted engagement
	Develop an iterative database for identifying CBOs, and curate a CBO-centric presentation and materials to share	

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CLOSE GAPS

Close the gaps in climate vulnerability through direct participation by impacted communities.

Communities often know the solutions to the issues they're facing but lack the political, economic, and technical resources needed to bring them to fruition. These objectives support this goal through capacity building yielding community ownership:

Table 3: Objectives for closing gaps

OBJECTIVES	TACTICS	EXAMPLES
1. Create a space where community has autonomy over the decisions that will impact their daily lives	Get community involved as early as possible in the decision-making process	Co-creating community agreements
		Identify stakeholders who have been historically excluded from the decision-making process
		Follow the guidelines offered in the Spectrum on Spectrum of Community Engagement to Ownership guide
	Encourage CBOs to design engagement processes that accurately reflect community priorities and educational needs	Conduct policy-mapping (policy development process and timelines etc.) sessions from a CBO/community perspective
2. Cultivate a pipeline of community leaders	Develop learning series of workshops for CBOs	Create materials such as BPS 101, Utilities 101, **Maria's Story**, and other relevant resources
	Recommend jurisdictions open their committees to include community leader representation	Community Accountability Board in Boston; Green Building Committee in Orlando

Table 3: Continued

| OBJECTIVES	TACTICS	EXAMPLES
3. Provide the capacity building and technical assistance needed to support community-led change	Work with organizations like **Greenlink** to share access to equity maps, identify vulnerable communities, and prioritize them in policy	Get CBOs **access to GEM**, use GEM to identify and prioritize engagement in energy-burdened and minority communities
		Utilize building stock analysis early in IMT's engagement process to identify which buildings are impacted by proposed policy (Orlando)
	Co-develop fundraising plans with CBOs	Community Climate Shift funder convening
		Provide funding to CBO partners to increase their capacity for CCS-related projects without disrupting their current workstreams
4. Incorporate community needs and goals into the policy as much as possible given IMT's expertise	Create a toolkit/ box of resources that can inform BPS policies (e.g. tenant bills of rights, case studies, etc.) for community audiences	Where **High-Performing Building Hubs (Hubs)** exist, create a community resources page on the website with accessible information that explains the process, what is happening, why, who is involved, etc.
		Create resources for frontline community residents to learn about types of utility commissions in their areas, and how to get involved in the decision-making process
5. Promote the creation of community-led boards, appointments, and positions of authority with legally-mandated authority & influence	Establish institutions that allow for community to have power	Hubs that integrate equity work and **Community Accountability Boards**
	Pilot economic inclusion effort(s) connected to building decarbonization	**Community Climate Shift** and **Building Innovation Hub** collaboration with Emerald Cities on **High-Road Contracting**

ENGAGEMENT SPOTLIGHT

CITY OF ORLANDO AND PODER LATINX

Aspects of the above framework have already been put into practice in the City of Orlando. In March 2021, IMT announced a Request for Proposal (RFP) process funded at $50,000 for community-based organizations serving Orlando, FL communities to engage stakeholders, residents, and the City of Orlando in the development, implementation, and evaluation of a building performance standard policy. The goal was to ensure the passage of equitable and successful community solutions to energy efficiency challenges.

Read the full story about our work in Orlando ➔
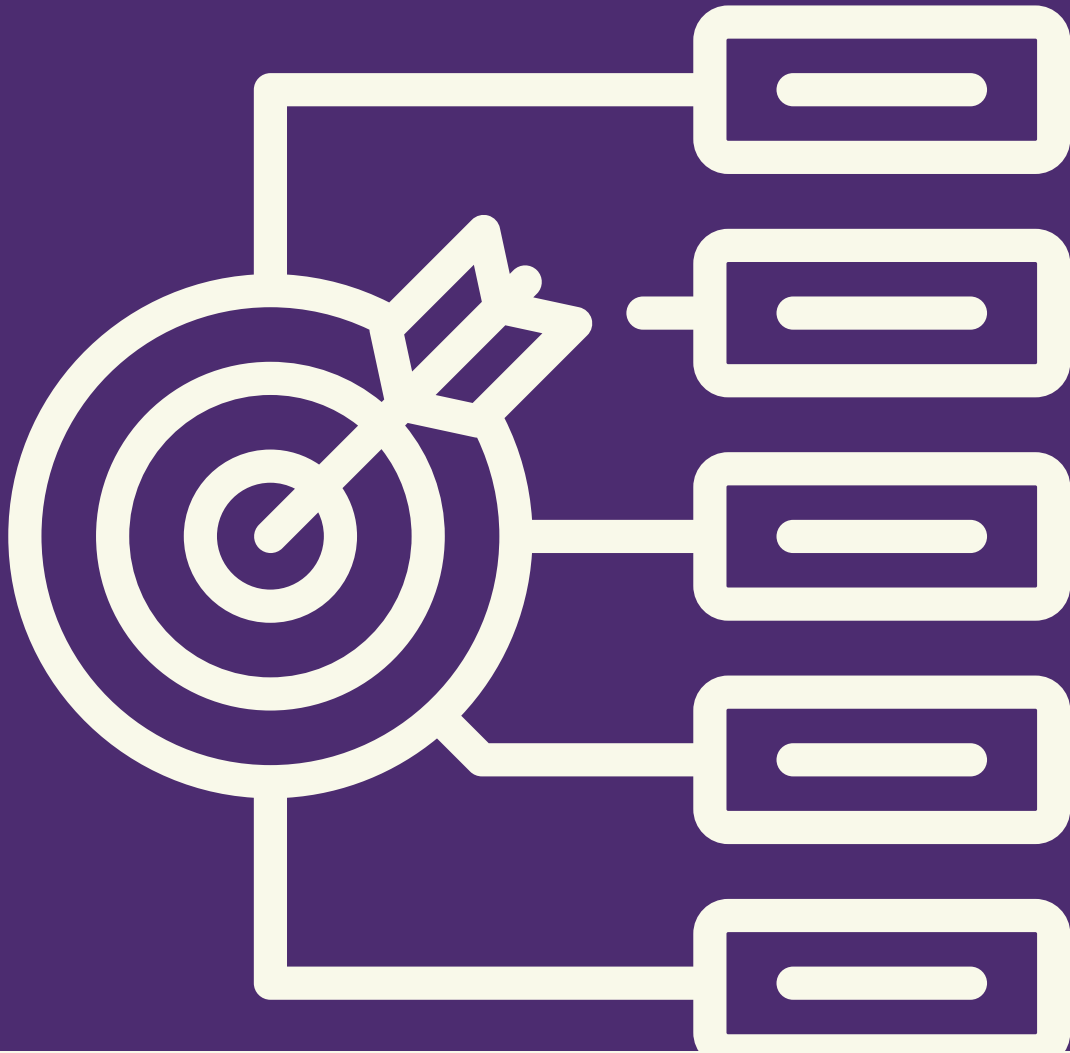
Section 2:

Outline of the IMT CE Process

GOAL SETTING

Before starting a new engagement process, it is important that we think critically about what our goals for the community are as it relates to our work and begin to set clear expectations for what our role is and what we will contribute.

Prior to launching an engagement process, IMT staff are encouraged to carefully consider answers to the questions on the **Community Engagement Intake Form**.

The purpose of this form is to think critically about why we are pursuing community engagement in a project and why and how IMT is equipped to engage in that process and project. The questions on the form aim to gather information and gain a broad understanding of the project as it relates specifically to community engagement:

- Who are you looking to engage?
- What is the purpose of engagement? What are you trying to accomplish?
- When will this take place? What is your proposed project timeline?
- Where is the engagement taking place? What communities call this region "home"?
- How will you reach the audiences and community members most impacted by the issue you are trying to solve?

ENGAGEMENT PROCESS

The following steps briefly describe IMT's engagement process to date, although this list incorporates staff feedback at various reflective points along the way to ensure equitable engagement through co-development and community ownership:

1. MOU Development and Execution

Co-develop a Memorandum of Understanding (MOU) to outline the scope of work, identify responsible parties, and guide the work until contract completion. This is also an opportunity to set expectations for each party, as well as intentional learning of the CBO partners' climate justice priorities. **See MOU from CBO engagement** in Orlando, Florida.

2. Training on Equity and Policy Co-Development

As part of equitable BPS policy development with IMT, key city staff involved in the project should be required to attend equity training to gain greater understanding of social, climate, and/or environmental justice and equity impacts on communities in their cities and towns. In these introductory sessions, key city staff must be supported in applying an equity lens to their work and engagement with the community organization partner. The city's chief equity officer or an equivalent should be involved in this process. **Kapwa Consulting** or a similar firm should host 1-3 part sessions prior to partnership with a CBO.

3. Onboarding of Project Partners

In partnership with all partners, the main convening partner should host a virtual training for context setting & scope review (if there is an opportunity to conduct this session in person, adapt the format to include a tour of the areas identified in the scoping of the project). Following onboarding, the main convening partner/community engagement lead and city lead will establish regular meetings, agendas, map out a timeline of completion, and provide overall project management.

4. Supporting CBOs in the Policy Development Process

The IMT Community Engagement and Policy teams will collaborate to actively support CBO engagement in the policy development process, as well as actively engage city staff toward a co-development model of policy-making. Guided by the Facilitating Power Spectrum of Community Engagement to Ownership, IMT will ensure a racial equity impact assessment is conducted as all parties explore BPS passage. Again, intentional, ongoing learning of the CBO partner's climate justice priorities should be explored here.

5. Completion of MOU Contract

Co-develop the Memorandum of Understanding (MOU) to outline the scope of work, identify responsible parties, and guide the work until contract completion. This is also an opportunity to set expectations for each party, as well as intentional learning of the CBO partners' climate justice priorities. **See MOU from CBO engagement** in Orlando, Florida.

COMMUNITY ENGAGEMENT EVALUATION PROCESS

It is essential that we take time to evaluate our work in order to understand the impact we are having on frontline communities. We suggest creating and conducting an evaluation process for engagement during the halfway point of the collaboration, once the project is complete, and at least 6 months after the project has ended.

In order to evaluate engagements, we must create shared definitions of success with the communities and partners we are collaborating with. What does it mean to be successful in our community engagement in a given project? Below are some examples of what success could include, but are not limited to:

- The right audience has been reached
- Communities who are traditionally marginalized have been involved in the process
- Equity has been integrated into the work
- Energy burden has been quantifiably reduced
- There has been a change in a government, utility, or business process that now centers community benefits

IMT's evaluation and impact should be defined given the parameters of the project and specific sector (e.g. business engagement, bps policy, codes, and utilities).

QUESTIONS FOR PROJECT AND ENGAGEMENT REFLECTION

- What were the engagement objectives and goals?
- What were the best aspects of the engagement?
- What were the most challenging aspects of the engagement?
- Were there any opportunities to course correct? How did we go about this?
- What was the overall impact of the project? Who benefitted and how? Give specific examples.
- Do the benefits of the engagement outweigh the costs?
- What should we do differently in the future?

HOW TO BE IN COMMUNITY SPACES AND ENGAGE WITH COMMUNITY MEMBERS

A key component of engaging the community is building trust. Trust is earned and requires respect, time, commitment, and follow–through. By working to build trust, we learn how to be in the right relationship with the community, how to work alongside the community, and how to "build the bigger we" as we work together to create climate solutions that benefit people and planet.

"Go slow to go fast"

Engaging with community requires establishing a strong foundation for us to begin building our work together. We cannot go into a community or try to engage CBOs without first creating and fostering the conditions necessary for trust building and shared visioning, which are necessary for mutually beneficial solutions to climate change and energy efficiency. To establish the foundation we must first "go slow", centering equity in our work and proposed solutions. Centering equity requires time and patience because it takes time to identify who is most impacted by the issues, who has been left out of these conversations, how we get them to the table, and how to build trust after decades of exclusion. We must also work to get to know each other.

These are the people you are allied with in your shared vision of solutions; you must build a relationship in order to establish and align what your priorities are, and how you will accomplish them.

Once equity becomes the foundation for our work and the relationships we build, we can be confident that what we design are real solutions that meet the needs of community and drastically reduce emissions. After this initial phase of foundation building, we can begin to "go fast". The workflow becomes easier, actions can be taken because there are clear guidelines for how to approach the work, and existing support systems can be identified and offered to one another.

OUR WORK IN ORLANDO

When IMT was approached by the City of Orlando to assist in their exploration of a BPS policy, IMT applied the "going slow to go fast" principle. Instead of rushing to provide technical support, we resourced a CBO (see **Case Study: City of Orlando and Poder Latinx**) to do community engagement around the policy. We also used the Spectrum of Community Engagement to Ownership tool to address any underlying tension between residents and city government and reached alignment on what deep democracy looks like when working with CBO partners. Allotting additional time for trust-building and community engagement resulted in a set of recommendations from Orlando's frontline community members to the mayor. Instead of developing a BPS policy based on assumptions, the City now has solutions from community members on how to address their needs and challenges through a BPS policy.

COMMUNITY AGREEMENTS

Community agreements are an essential part of working with the community; they are rules and guidelines for how to engage with one another. Community agreements aim to foster a space for true collaboration, respect, and relationship building. They create a space where all experience, expertise, and wisdom are welcome. **When engaging with community, we must always be mindful and intentional about following community agreements in order to build trust.**

Oftentimes, community agreements are co-developed with the people whom you are collaborating with. The following points below are examples of community agreements we co-developed with city and community partners in Orlando:

1. **Practice active and deep listening.** Listen to understand, not just to respond or defend.

2. **Intent vs. impact.** Assume good intentions, but acknowledge the impact of what is said and work to maintain accountability.

3. **Maintain confidentiality.** Take the wisdom and lessons out of the room, but leave the names to protect privacy.

4   **Use inclusive and accessible language.** Avoid using jargon, explain any acronyms and technical concepts used, and respect everyone's pronouns and identities.

5   **Be present.** Avoid outside distractions as much as possible, but be compassionate toward everyone's "work from home" situations.

6   **Take space, make space.** Be cognizant of how much you are speaking; everyone's voice has equal weight here. Practice taking space (be willing to share your thoughts) and making space (keeping your thoughts concise, actively listening to others, and asking questions).

7   **No one knows everything, but together we know a lot.** We are all experts in our own right, let's work together to tap into everyone's expertise.

8   **Speak from your own experience.** Use "I" statements. Speak for yourself and from your own lived experience rather than from generalizations or assumptions.

9   **There are no dumb questions.** This is a space for all types and levels of learning. It is better to ask a direct question than to move forward without concrete understanding.

10   **Tackle ideas, not the delivery or the person.** If something comes off as problematic or harmful, let us focus on why this may exacerbate an issue rather than making it personal.

11   **Bonus: Take care of your needs!** Physical, mental, and emotional well–being are important, so don't shy away from taking care of yourself and practicing personal resilience.

> It is important to note that community agreements are not static. Although their purpose is to ground you, in practice, they are a living and evolving set of principles that can always be changed or added to in order to accommodate and respond to the needs of the community.

LAND ACKNOWLEDGEMENTS

Many community spaces that center environmental, climate, and social justice often start their meetings, events, and conversations by asking folks to introduce themselves, share their pronouns (if they feel comfortable doing so), and share whose land they are currently on. This is because these spaces aim to root participants in history, and many advocates believe we must look to the past in order to understand how we arrived at the issues of the present. It is essential to get in the habit of this practice in order to be prepared when entering environmental, climate, and social justice spaces that are often rooted in place-based strategies and place-based action.
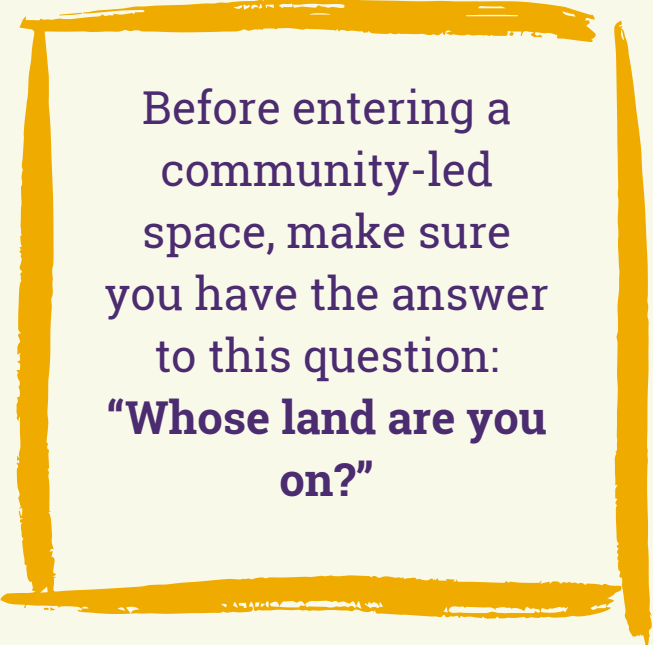
What is a land acknowledgment?

A land acknowledgment is the practice of naming and honoring the original caretakers of the land where you now reside, work, or play. Land acknowledgments are often done in introductions and can be accompanied by moments of silence to honor the dark and painful history of colonization and displacement.

Why are land acknowledgments important?

"It is important to understand the longstanding history that has brought you to reside on the land, and to seek to understand your place within that history. Land acknowledgements do not exist in a past tense, or historical context: colonialism is a current ongoing process, and we need to build our mindfulness of our present participation."

– **Northwestern University**

Before entering a community-led space, make sure you have the answer to this question: **"Whose land are you on?"**

APPENDIX

FURTHER READING

Both this guide and the Community Framework are rooted in foundational frameworks, definitions, practices, and theories developed by others in this space. Summary descriptions of these are below.

We ask that you review the resources to educate yourself on equitable and meaningful community engagement. To do this work well, we must listen to those on the frontlines of climate and environmental degradation and this is what they are telling us they need. It is important that you have a clear understanding of these terms and frameworks in order to ensure our practices align with these values, and to avoid the co-optation of grassroots movement building.

If you have questions on any of the resources below, reach out to:

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Appendix A

JUST TRANSITION

The Just Transition framework was developed in 1997 through a coalition of frontline workers and communities that aimed to fill a gap in environmental organizing and policy-making. This framework aims to find solutions to our climate crisis that leave no one behind.

Just Transition is a vision-led, unifying and place-based set of principles, processes, and practices that build economic and political power to shift from an extractive economy to a regenerative economy. The transition itself must be just and equitable; redressing past harms and creating new relationships of power for the future through reparations. If the process of transition is not just, the outcome will never be.

Just Transition describes both where we are going and how we get there. This framework is discussed in more detail in the Community Framework and on the **Climate Justice Alliance** website.

Appendix B

FALSE SOLUTIONS

False solutions are approaches to climate change that will only worsen our ecological and economic crises. False solutions are exclusionary and inaccessible, they treat the symptoms and not the root causes of climate change while excluding frontline and marginalized communities.

False solutions...

Extract wealth from frontline community members and further concentrate wealth and political power	Continue to poison, displace, and imprison residents of frontline communities	Reduce the climate crisis to a crisis of carbon, rather than a complex and injust humanitarian crisis

> We can move away from False Solutions by listening to and collaborating with community. To learn more about the Just Transition visit the **Climate Justice Alliance** or the **Just Transition Alliance.**

Appendix C

SOURCES OF POWER

Understanding our power as an organization and as individuals is essential to properly executing our community-based work. IMT is a very powerful organization, having Positional, Expert, Institutional, and Structural Power. Through our community engagement work, we aim to share that power with impacted communities through "co-powering" and building collaborative power.

The definitions below come from the **National Community Development Institute**.

- **Positional power** comes from organizational authority or position (people providing capacity-building technical support have this power). It is often forgotten by people with power, rarely forgotten by those without it.
- **Referred power** comes from connections to others (e.g., a staff member without formal positional power but has known the ED for years).
- **Expert power** comes from wisdom, knowledge, experience and/or skills (e.g., someone is widely respected because of her skills as an organizer).
- **Ideological power** comes from an idea, vision or analysis. As Victor Hugo said, "Nothing can withstand the power of an idea whose time has come." It can be an individual's original idea, an ideal such as "democracy" or "liberation," or a developed ideology.
- **Obstructive power** stems from the ability to coerce or block. Whether implicit, threatened or demonstrated, those without other sources of power may depend on it. Many activists are experts in its use.
- **Personal power** includes energy, vision, ability to communicate, capacity to influence, emotional intelligence, psychological savvy, etc.
- **Co-powering** is an idea that comes from the Latino community. It speaks to the responsibility for individual leaders to mindfully work towards supporting the personal power of others through modeling, validating and giving feedback.
- **Collaborative power** comes from our ability to join our energies in partnership with others in pairs, teams, organizations, communities, coalitions and movements.
- **Institutional power** means economic, legal and political power directly wielded by institutions,whether it's a corporation, police department or one of your organizations. This institution exists apart from the individuals who work there at any one time and enjoys name recognition, membership, etc.

- **Cultural power** from the perspective of the dominant culture, means cultural norms, condition-ing and privilege regarding race/class/gender/age. As with positional power, this power is often invisible to the dominant group. To those with less power, it is a real and everyday experience. From the perspective of oppressed peoples, cultural power means a consciousness of community, class or culture that serves to empower.
- **Structural power** is power that's covertly or implicitly exercised through the dominant institutions of society (e.g., the resistance to alternative medicine from the AMA and insurance providers, racism expressed and maintained through structures such as red-lining by lending institutions).
- **Transcendent power** comes from our connection to a higher power such as spiritual, natural and/or historical imperative.

Appendix D

SPECTRUM OF COMMUNITY ENGAGEMENT TO OWNERSHIP

The Spectrum of Community Engagement to Ownership was developed by Rosa Gonzalez of **Facilitating Power**. It is aimed at leaders of community-based organizations, local governments, philanthropic partners, and facilitative leaders trusted by communities in order to assess and revolutionize community engagement efforts to advance community-driven solutions.

At IMT, we position ourselves as a "3rd party facilitator" between cities and communities. We work to redefine who qualifies and is valued as an "expert" in our engagement processes. IMT uses the Spectrum whenever applicable to ensure we are fostering the conditions, conversations, and resources necessary to "move to the right" of the Spectrum toward community ownership of energy efficiency and climate solutions. For more detail, **read the full PDF guide**.

Appendix E

THE PRINCIPLES OF ENVIRONMENTAL JUSTICE

The Principles of Environmental Justice were developed by the delegates to the First National People of Color Environmental Leadership Summit held on October 24–27, 1991, in Washington DC. It was in this summit that leaders drafted and adopted 17 principles of Environmental Justice. Since then, The Principles have served as a defining document for the growing grassroots movement for environmental justice.

Appendix F

JEMEZ PRINCIPLES FOR DEMOCRATIC ORGANIZING

The **Jemez (pronounced "Hay-mayz") Principles for Democratic Organizing** were developed in December 1996 by 40 people of color and European-American representatives in Jemez, New Mexico.

The Jemez meeting was hosted by the Southwest Network for Environmental and Economic Justice with the intention of hammering out common understandings between participants from different cultures, politics and organizations. The following "Jemez Principles" for democratic organizing were adopted by the participants and are now used in various environmental and climate organizing and movement spaces.

The Principles

Be inclusive

Emphasis on bottom-up organizing

Let people speak for themselves

Work together in solidarity and mutuality

Build just relationships amongst ourselves

Commitment to self-transformation

Appendix G

COLIBERATE CLIMATE PLANNING

Coliberate Climate Planning is a curriculum for community-driven research & planning. It blends liberation and collaboration to create the term "coliberate" and it emphasizes a five-stage process for education and action. You can **find the Coliberate curriculum in here**.

To learn more about Coliberate and the Flower of Praxis **watch their Vision, Power Solutions training**.

Appendix H

VISION POWER SOLUTIONS SERIES BY NATIONAL ASSOCIATION OF CLIMATE RESILIENCE PLANNERS (NACRP)

Launched in April 2021, the 12-month series provides an overview of the framework of community-driven planning featuring national leaders disrupting top-down methods and uplifting the voices and values of Black, Brown, and Indigenous communities.

Designed in collaboration with the NAACP, Facilitating Power, Climate Innovation at Movement Strategy Center, and the National Association of Climate Resilience Planners (NACRP), the series focuses on community vision to name priorities addressing justice issues, with solutions based on community needs and experience, in order to build power – making lasting political, cultural, and economic change.

Read about the series on the NACRP website.