# Delivering Training on Community Benefits Agreements

## Overview

The community benefits agreement (CBA) training seeks to help participants learn the basics of CBAs, develop a shared language for communicating community concerns, and engage in dialogue around lessons learned from other similar CBA processes. While sharing their own experiences and knowledge, participants also build relationships with other key stakeholders and set the stage for future collaboration and negotiations.

Port operators and other related entities such as freight transportation providers (e.g. shipping, trucking and rail companies), power-generating facility operators and infrastructure developers might host a similar training if they are considering ways to develop active community engagement, project design participation and support for projects. When productive, transparent working relationships with communities develop. With transparency, port operators and other similar entities can explore win-win opportunities and achieve more progress on an accelerated timeframe.

Communities might benefit from the CBA training if they are interested in ways to coordinate with public and private entities to reduce adverse operational impacts and ensure positive outcomes for all parties. During the training, communities will learn about the CBA as a strategic tool to not only communicate with public and private sector stakeholders but increase their leverage points with these entities.

## Scoping the Training

When organizing the training, the entity or community should first identify its goals and desired outcomes. The goals and desired outcomes will guide the audience, design, and execution of the training. For example, if the goal is to share information with a community, the training session may include larger groups of participants with seats arranged in consecutive rows. However, if the goal is to discuss complex issues, the training may include smaller groups with eight to twenty people with seats arranged in U-shape to facilitate conversation.

## Selecting a Facilitator/Trainer

This tool assumes the selection of a facilitator who has expertise in developing Community Benefits Agreements and working closely with communities that have environmental justice concerns. If it is not possible to identify a facilitator with this expertise, the training could be modified to exclude the agenda items that would rely on that expertise (e.g., the Q&A interview aimed at the facilitator at the end of the agenda could be adapted into a discussion between participants about considerations for development of CBA based on what they have learned).

## Ground Rules and Facilitator Tips

At the beginning of the CBA training, the facilitator should set goals and expectations and get participants to agree to them. These expectations will ensure every participant can express their thoughts in an open, respectful environment. Shared expectations for the training may include:

* Active participation from everyone – every participant is responsible for a productive discussion.
* Try your best to share interests (e.g. motivations, values) rather than positions (e.g. demands).
* Disengage from other activities such as checking your emails or texting on your phone.
* Step up and step back – if you find that you are speaking frequently in the conversation, give others the space to speak and contribute.
* Share your honest perspective using “I” rather than “we” statements so that every participant speaks from their own unique experiences.
* Ask probing questions if participants feel unsure or confused.
* Consider the confidentiality of the discussions. Avoid repeating others’ words outside of the training without their permission.
* Avoid assumptions or immediate judgments about what other participants think. Assume others are speaking from a place of good intentions.
* Avoid interruptions and side conversations when another participant is speaking.
* Criticize an idea not the individual person expressing that idea.
* Understand the significance of silence and time to pause or reflect.

A neutral facilitator helps set the ground rules. Because a neutral facilitator is not a stakeholder in development projects, they can be especially helpful in navigating scenarios and circumstances involving contentious issues. They can ensure that all participants are heard from during discussions without any perceived bias or favoritism.

However, the training can also be facilitated by representatives from the stakeholder groups. A community facilitator may consider the following guidelines for the training:

* Designate an individual to support the facilitator as a notetaker and timekeeper to ensure that there is enough time for meaningful discussion.
* Include activities that showcase and celebrate different individual styles for conflict resolution, leadership, communication, and collaboration.
* Encourage participants to listen for areas of interests that are both similar and different.
* Share relevant personal stories from the facilitator’s own experiences to underscore critical points, establish common ground and develop trust among participants.
* Allow time in the training to pause – participants may need time to clarify information and digest personal and professional implications.

## Tailoring the Training Materials

*Training materials include:*

* A sample facilitator’s agenda (see Pages 4-6 below)
* A sample training agenda template (see Page 7 below)
* CBA Training presentation and generic speaker notes (PowerPoint)

*Discussion of tips and tailoring for various modules of the training:*

The modules can be adapted to fit the goals, desired outcomes and audience of the training in the following ways:

* An icebreaker that encourages stakeholders to connect and find common ground with others outside of their organizations. Consider inviting participants to share their individual perspectives in an uplifting way such as through their vision for future collaboration.
* Discussion questions that respond to concerns raised before and during the training.
* Identify place-specific examples that participants can react to.
* Dialogue that leverages the unique skills and experiences of the participants. Consider how the training can allow participants to share their knowledge and expertise, exchange their insights, and allow for leadership opportunities.

## CBA Training Facilitator’s Agenda

**[date]**

**[training location]**

*Purpose*

* Learn the basics of Community Benefit Agreements (CBA).
* Engage in a dialogue around lessons learned from other CBA processes.

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| --- | --- | --- |
| **Time** | **Description** | **Lead** |
| **Start** | **Welcome and Introduction** |  |
| **5 min.** | **Welcome**   * Share a welcome on behalf of the host organization | Host representatives |
| **5 min.** | **Agenda Overview and Framing Remarks**  Today we hope to accomplish the following:   * Learn the basics of Community Benefit Agreements (CBA) and * Engage in a dialogue around lessons learned from other CBA processes.   *[Insert additional framing remarks as appropriate to the context of the meeting.]* | Neutral Facilitator |
| **10 min.** | **Introductions**  In 30 seconds or less, please share:   * Your name, community and/or agency represented, role * What is your vision for working together? * What would a successful CBA process look like to you? | Neutral Facilitator |
| **CBA Training** | |  |
| **60 min.** | **Community Benefits Agreement Training**  *[Facilitator may wish to offer additional detail on his or her professional background and expertise in Community Benefits Agreements here, to build trust with the participants and set the context for the discussion that follows the presentation. See the CBA training PowerPoint file for this portion of the agenda.]*  We will stop for Q&A at points throughout the presentation. These pauses will be opportunities to ask clarifying questions about the content being presented and respond to a short discussion question. Please save any discussion about how this information could be applied for the facilitated dialogue after the presentation. We really want to make sure we have adequate time for that discussion, so Notetaker will be playing a strict time keeping role during this section of the agenda to make sure we are ready to jump into the dialogue afterwards. | Neutral Facilitator  Notetaker advances slides, takes notes, shows the website and videos, and provides strict time keeping |

|  |  |  |
| --- | --- | --- |
| **Facilitated Dialogue** | | |
| **60 min.** | **Facilitated Dialogue: Lessons Learned from CBA Processes**  Host representatives “interview” the facilitator, using the following questions. Participants are invited to interject their own questions, reflections and responses throughout, and host representatives are responsible for watching the time and making sure the conversation moves along.  Note to host representatives: You do not need to go through these questions 100% sequentially or hit every single one. Read the room, watch the time and help guide the group through this dialogue.   * *Overview*: Tell us what CBAs you have been involved in developing as a community advocate? * *Timeline*: What was the timeline for each CBA? What factors influenced the timeline? * *Parties*: Who needs to be at the table to develop the CBA?   + Who represented the community?   + Who represented the other party?   + Do you recommend use of a lawyer and/or a professional facilitator or negotiator for parts of the process?   + What about inclusion of other parties? (e.g., unions, local government, other industries….)   + Who actually drafted the agreements? * *How to be Effective*: What collaboration building did the community need to be effective?   + Training on issues?   + Would you recommend connecting with other CBA advocates for help?   + Other collaboration building areas? * *Prioritizing Community Benefits*: What community benefits were included in each CBA?   + How did you decide what topics got included and which got left out? Were there tough tradeoffs?   + How did the community develop consensus? Would you recommend a neutral-facilitator or negotiator? * *Any Other Lessons Learned*:   + What did you learn through the process that you wish you had known at the beginning?   + What are the “landmines” that participants should be wary of in developing a CBA? * *Q&A:* Open Q&A, if time is remaining.   **Alternative Facilitated Dialogue:**  If the facilitator is not trained in the CBA process, they can instead lead a discussion to gather important considerations for the development of a CBA.   * *Overview:* How do you think a CBA could benefit your community or agency? * *Timeline*: What factors do you think might influence the timeline of the development of a CBA in your community? * *Parties*: Who do you think should be at the table to develop the CBA? * *How to be Effective*: How can you communicate the interests behind your positions and find common ground on creating community benefits with other stakeholders? * *Prioritizing Community Benefits*: What community benefits have been identified as important to the community? Which community benefits are near-term goals? Which community benefits are long-term goals? | Host representatives, Neutral Facilitator and the participants  Notetaker taking notes on considerations that emerge for the participants.  (These considerations may be a good place to start the next discussion on implementing a CBA – to verify them and more fully flesh them out.) |
| **10 min.** | **Wrap up and Next Steps**   * Summary of discussion outcomes and next steps * Facilitator and host representatives offer closing thoughts. | Neutral Facilitator and Host representative |
| **End** | **Adjourn** |  |

## CBA Training – Participants’ Agenda

**[date]**

**[training location]**

*Purpose*

* Learn the basics of Community Benefit Agreements (CBA).
* Engage in a dialogue around lessons learned from other CBA processes.

*Agenda*

5 min. Welcome (host representative)

5 min. Agenda Overview and Framing Remarks (facilitator)

10 min. Introductions (led by the facilitator)

60 min. Community Benefits Agreement training (led by the facilitator)

60 min. Facilitated Dialogue: Lessons Learned from CBA Processes (host representatives and

participants interview the facilitator)

10 min. Wrap up and Next Steps (facilitator and host representative)

End Adjourn