Good Education and Outreach Practices:

Guiding Principles and Practical Considerations for Cornerstone Standards Council

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Executive Summary

The Cornerstone Standards Council (CSC) has created a voluntary Responsible Aggregate Standard and Certification process for aggregate extraction operations (e.g., pits and quarries) in Ontario. In November 2014, CSC embarked upon a two-year pilot study period to investigate the real-life strengths and limitations of this voluntary protocol.

In light of the pilot study goals, CSC has engaged the University of Waterloo Community, Health, Environment, Communications (CHEC) Initiative to develop education and outreach materials and industry support tools. These materials and tools will help stakeholder groups and Aboriginal communities to better understand and engage with the Standard and Certification process.

This report focuses on the development of the education and outreach materials. It presents the findings of our review of practitioner sources that provide guidance on how to do education and outreach, considering both non-Aboriginal and Aboriginal contexts. We selected twelve reports and one blog for our review (see Appendix A). Our findings provide the basis for the education and outreach materials for CSC.

On the whole, we found that there is a dearth of practitioner guidance on how to do education and outreach, particularly in mining and aggregate resource management sectors. More research is needed to investigate and develop best practice principles and helpful guidance tools, specifically for the aggregate resource management sector.

The general consensus among the information sources that we reviewed was that education and outreach processes should be

- inclusive of all interested and affected stakeholders and Aboriginal individuals;
- integrated with project management from the outset; and
- devoted to considering appropriate timing for education and outreach activities.

It is important to note that other key guiding principles can be derived from the collaborative planning scholarship: a commitment to equality in terms of how stakeholder and Aboriginal concerns are considered, transparency in decision-making process matters, consideration of alternatives, and a responsibility to ensure that all interested and affected stakeholders and Aboriginal individuals and communities are fully informed of project details.

The resources that we reviewed prescribed the following steps for developing education and outreach strategies:

- Assemble an education and outreach team,
- Investigate the local context,
- Develop an education and outreach strategy,
- Implement the education and outreach strategy, and
- Monitor, evaluate and adjust strategies as necessary.

In Aboriginal contexts, it is important to consider the aforementioned guiding principles and steps as well as key culturally specific factors including, among others:

- Aboriginal treaty rights,
- Overlapping or shared traditional territories,
- Existing communications and consultation protocols,
- Culturally specific beliefs, ways of knowing, knowledge and language,
- Project-specific impacts related to lands and resources, traditional knowledge, financial, cultural and political interests, and
- Chiefs, Council members, Elders and youth (e.g., include these individuals in education and outreach planning).

Decisions about which education and outreach methods and materials to employ should be based on the local context and the objective(s) of a particular activity (see Appendix B for a full list of methods). It is helpful to consider whether or not the selected method(s) and materials

- are appropriate for the target stakeholders and/or Aboriginal communities;
- are inclusive of all interested and affected stakeholders and Aboriginal individuals;
- will cover the entire target audience;
- are appropriate for the intended objective and message;
- can be distributed effectively, considering time, staff and budget needs; and
- are accessible to all.

Specifying the above guiding principles and practical considerations for CSC's Responsible Aggregate Standard and Certification process is a matter of considering

- which organizations will be doing the education and outreach;
- the intended audience(s);
- the overarching purpose(s) of education and outreach;
- what information to share and which methods to employ, considering different audiences and overarching purposes; and
- the appropriate point(s) in the certification cycle at which to share particular pieces of information.

Finally, we recommend that practitioners structure their education and outreach planning around sustainability decision criteria (see Appendix C) to ensure that investigations, goals and activities contribute positively to all areas of community wellbeing.

The next steps in our creation of education and outreach materials for CSC include a review of the CSC's Responsible Aggregate Standard and Certification System Manual. These documents provide the substance for the materials. They also begin to illuminate how the materials should be presented by CSC, as well as how proponents should incorporate education and outreach strategies and resources within the CSC's Certification process.

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1. Introduction

The Cornerstone Standards Council (CSC) is a collaboration of Aboriginal individuals and stakeholders from community, environmental, agricultural and industry organizations. Over the past three years, CSC has created a voluntary Responsible Aggregate Standard and Certification system for pits and quarries in Ontario. This voluntary protocol goes beyond legislative requirements for pit and quarry developments, giving aggregate producers a means to demonstrate their social and environmental leadership.

CSC's Responsible Aggregate Standard is comprised of Principles and Core Requirements that a pit or quarry must meet in order to be certified. The Certification system provides the framework by which aggregate sites are assessed against the Standard. Independent, third-party auditors assess conformity with the Standard, following the guidelines provided in the Certification System Manual.[1]

In November 2014, CSC embarked upon a two-year pilot study period to investigate the real-life strengths and limitations of this voluntary protocol. Over the next two years, CSC aims to engage a diverse range of stakeholders and Aboriginal individuals in the application of the Standard and Certification requirements in order to revise these requirements based on lessons learned and feedback received.

In light of the pilot study goals, CSC has engaged the University of Waterloo Community, Health, Environment, Communications (CHEC) Initiative to develop education and outreach materials and industry support tools. These materials and tools will help Aboriginal communities and stakeholder groups to understand and engage with the Standard and Certification process.

This report focuses on the development of the education and outreach materials. It presents the findings of our review of practitioner sources that provide guidance on how to do education and outreach. Our findings provide the basis for the preliminary development of the education and outreach materials for CSC.

Education and outreach is a component of planning for industrial developments and natural resource management undertakings. It is a means to provide information to, solicit feedback from and communicate with interested and affected stakeholders. Good education and outreach practices should rest on overarching principles and practical considerations as well as decision criteria that help practitioners to ensure that their activities contribute positively to community wellbeing.

In Section 2, we describe the methods that we used to undertake our review. We concentrated on education and outreach standards in pertinent industries, including mining, energy, and Aboriginal lands and resources management, among others. The findings (guiding principles and practical concerns) that we present in Section 3 reflect a common understanding of good education and outreach practice and, as such, they are suitable for a broad range of applications.

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[1] For more information about the CSC's Responsible Aggregate Standard and Certification System, visit the CSC's website where you can download the latest informative resources: http://www.cornerstonestandards.ca/

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The next step in developing education and outreach materials for CSC is to specify the guiding principles and practical concerns outlined in this report for the context of the Responsible Aggregate Standard and Certification process. In Section 4, we consider the implications of our findings for our development of CSC-specific education and outreach resources.

1.1 What is Education and Outreach?

Here, 'education and outreach' is defined as a two-way dialogue between project proponents and internal and external parties, including Aboriginal individuals. It provides a means to understand, anticipate and address stakeholder and Aboriginal perceptions and concerns about a particular initiative. As such, it requires the transfer of information as well as processes for listening, soliciting feedback, responding appropriately to feedback, and monitoring and evaluating the success of these activities.[2]

It is important to note that in this report we distinguish between public education and outreach and public participation or collaboration. The latter is fundamentally rooted in questions about whether and how decision-making processes contribute to social justice. While good public education and outreach may address matters of social justice (e.g., distribution of costs, benefits and impacts), education and outreach practices are more oriented towards informing and soliciting feedback from interested and affected stakeholders and Aboriginal individuals. Scholars and practitioners have investigated best practices in collaborative or participatory decision making elsewhere.[3] Markvart (2015) presents a concise summary of these best practice principles in her dissertation.[4]

2. Methods

A first step in creating CSC-specific education and outreach resources is to understand what good education and outreach practices are, considering both non-Aboriginal and Aboriginal contexts.

Our review of education and outreach practices concentrated on the practitioner literature as opposed to academic scholarship. We searched online for readily available, free practitioner materials that give direction to practitioners on how to do education and outreach. We used the following search words consistently:

- Education and outreach strategy,
- Best practices in education and outreach,
- Best practices in Aboriginal education and outreach,
- Education and outreach case study, and
- Aboriginal education and outreach case study.

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[2] Ashworth et al., 2011; National Energy Technology Laboratory, 2013; Federal Energy Regulatory Commission, 2015.
[3] There is general agreement among collaborative planning scholars and practitioners that good collaborative or participatory decision making requires an inclusive approach, dialogue free from coercion, transparency, and a focus on social and environmental justice, among other principles (see Innes & Booher, 1999; Margerum, 1999; Fung, 2006; Healey, 2006).
[4] See Markvart, 2015.

We focused on relevant industry sectors, e.g., mining, drinking water source protection, renewable energy, and Aboriginal lands and resources management. Twenty-four reports and one blog emerged from our search. On the basis of clarity and comprehensiveness, we selected twelve reports and the blog for review (see Appendix A).
We used the following two questions to structure our review of the resources:

> i) What does this source tell us about how to do education and outreach?
> ii) What education and outreach methods does this source recommend?

We aggregated the findings in Microsoft Word, using the above two questions to organize the data. From this aggregation step a portrait of good education and outreach practices emerged.

We should note that our findings are limited by the focus of our search on relevant education and outreach practitioner research. There is much overlap between education and outreach research and collaborative or participatory planning research. And other bodies of scholarship provide important insights about participatory decision-making for sustainability.[5] In Section 4, we give a brief summary of Gibson et al.'s (2005) sustainability decision criteria and explain how to incorporate them in education and outreach planning. Because we do not attend in an in-depth way to the lessons learned from these and other relevant fields of study, the finding of this report may overlook important substance and process matters. Future research on good education and outreach practices would benefit from a more comprehensive approach.

In Section 3 below we present the findings. Then, in Section 4 we discuss what the results imply for our creation of CSC-specific education and outreach materials.

3. Findings

On the whole, we found that there is a dearth of practitioner guidance on how to do education and outreach, particularly in mining and aggregate resource management industries. In general, practitioners use a range of terms (e.g., stakeholder consultation, public engagement, stakeholder communications) synonymously with education and outreach. Practitioners also discuss education and outreach as a sub-topic of stakeholder engagement and/or communications. Further research is needed to investigate and develop good practice principles and helpful guidance tools for education and outreach specifically, notably in the aggregate resource management sector.

As we mentioned in our Introduction, the findings that we share in this Section represent a common understanding (among the reports we examined) of good education and outreach practices. The good practices that we describe are therefore generic and may be applied in a wide range of contexts. In the Sub-Sections below we describe our findings according to the two questions that framed our review, considering non-Aboriginal and Aboriginal contexts separately.

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[5] See Gibson et al. (2005) for a comprehensive explanation of sustainability-based decision criteria and processes. These criteria and processes are generic and adaptable to education and outreach contexts. We explain this in more detail in sub-section 4.1.

3.1. Good Education and Outreach Practices for Non-Aboriginal Communities

The key findings about good education and outreach practices for non-Aboriginal communities can be roughly divided into two major categories: guiding principles and practical advice about developing and implementing an education and outreach plan. In the sub-sections that follow we describe our findings in both categories, in turn.

3.1.1 Guiding principles

With respect to guiding principles, there was a general consensus among the reviewed information sources that education and outreach processes should be

- inclusive of all interested and affected stakeholders;
- integrated with project management from the outset; and
- devoted to considering appropriate timing for education and outreach activities.

In the paragraphs below we describe each of these principles in turn.

Inclusive education and outreach processes

Inclusive education and outreach processes ensure that stakeholders who might otherwise be excluded or marginalized are included. Since community buy-in is integral to the success of many aggregate extraction and other industrial developments, attending to all interested and affected stakeholders increases the likelihood of broad acceptance of the project. It also increases the likelihood of a fair distribution of project impacts, mitigation measures and benefits.

Integrate education and outreach with project management

Early and frequent education and outreach facilitates meaningful communications and instils a sense of empowerment within the community. It should start at the time of project conceptualization, while the project scope is still being determined. In other words, project management and education and outreach should be integrated from the beginning. The overall project management plan should address questions about how to engage and communicate with the public in every phase of the undertaking. It is particularly important to consider and include education and outreach in the project budget during the early stages of planning.

Appropriate timing of education and outreach activities

Management of education and outreach will change as a project unfolds. It is important to tie education and outreach with critical points in the project, especially high visibility education and outreach points. For example, one good idea is to host a project briefing meeting at an early stage to introduce the project to the community: describe the purpose and need of the project, ask about desired frequency of updates, and collect info about how stakeholders would like to be kept informed, etc.

As we noted in Section 2, there is much overlap between education and outreach practitioner work and collaborative planning or participatory decision making scholarship and practice. Because our review is limited in scope, the above guiding principles are not comprehensive of pertinent concerns that other practitioners and scholars have prescribed for good public

participation processes.

It is beyond the scope of this report to elaborate on a comprehensive suite of relevant guiding principles. Some obvious concerns not addressed in the list above include a commitment to equality in terms of how stakeholder and Aboriginal concerns are considered; transparency in decision-making process matters; consideration of alternatives; and a responsibility to ensure that all stakeholders and Aboriginal individuals are fully informed of project details.[6]

Also missing from these guiding principles are criteria that help practitioners to structure education and outreach activities around integral sustainability matters. Sustainability concerns pertain to livelihood sufficiency, resource maintenance and efficiency, the distribution of costs, benefits and impacts, and ecological integrity, as well as how practitioners should consider and incorporate these matters in decision making to contribute positively to community wellbeing. Sub-section 4.1 provides a brief introduction to sustainability decision criteria.

3.1.2 Creating and implementing an education and outreach plan

The practitioner sources that we reviewed gave practical advice on how to create and implement an education and outreach strategy. These tips provide the basis for CSC-specific education and outreach materials and tools. Generally, the following steps were prescribed:

- Assemble an education and outreach team,
- Investigate the local context,
- Develop an education and outreach strategy,
- Implement the education and outreach strategy, and
- Monitor, evaluate and adjust strategies as necessary.

Assemble an education and outreach team

In the early stages of a project, an education and outreach team should be assembled. The team should be comprised of appropriate expertise, including senior management, trusted community champions and local experts. Support from senior management should help to ensure that education and outreach activities are integrated with project management. A strong link between the planning team and the project manager should also strengthen the tie between education and outreach and project planning. Similarly, participation from community champions and local experts should serve to facilitate trust between local residents and project proponents. Other members of the outreach team should be involved in and knowledgeable about the technical details of the project, as well as individuals who have knowledge in communication, education, and community relations.

Investigate the local context

Education and outreach activities are situated within complex local contexts that need to be taken into account. Education and outreach efforts should be adapted to the local context as well as to the details of a particular project. Knowing the local context should help to ensure that the most effective mode of communication and dissemination of information are selected.

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[6] These collaborative planning principles are outlined in detail in Markvart, 2015.

The purpose of this investigative step is to develop a solid understanding of stakeholder concerns and perceptions as the basis for education and outreach materials and activities. It is a means of gaining insight into the driving forces, key decision makers, questions and concerns, etc., within a community.

The following factors are important to consider when investigating the local context:

- demographic information,
- different stakeholder interests, concerns, values, attitudes, and perceptions,
- community champions, local experts, local authorities,
- local organizations,
- pertinent laws, policies and decision-making processes (local, provincial, federal),
- trusted sources of information in the community,
- established communications processes and infrastructure in the community,
- stakeholder understanding about the project,
- potential impacts and benefits (social, economic, environmental, local, regional, global, cumulative, etc.) of the project, and
- other industrial and commercial developments in the community.

Early presentations to the local community should show consideration of the pertinent information learned during this step.

Develop an education and outreach strategy
The education and outreach strategy should inform the overall plan to manage, monitor and evaluate project education and outreach undertakings throughout the duration of the project. Contents of the strategy should include a description of

- the local context and key stakeholder groups,
- the education and outreach team, including roles and responsibilities,
- outreach objectives (created based on the analysis of the local context),
- key messages,
- tactics, including tasks and events that coincide with the project stages, and
- a timeline of outreach activities, considering enactment, monitoring, evaluation and revision stages.

Key messages are the main messages that comprise the campaign. They should be tailored to the local context. They should be clear, concise, free from jargon, engaging, and they should anticipate and respond to issues that may be raised.

A phased approach should be considered when organizing strategy tactics. This ensures that the activities coincide appropriately with critical points in the project timeline. For example, many projects can be divided into pre-launch (get to know and prepare the stakeholders), launch (identify tactics to communicate key messages) and post-launch (identify follow-up communications to repeat or reinforce the message) phases.

Implement the education and outreach strategy

Keeping implementation needs, constraints and opportunities at the forefront of education and outreach planning will help to ensure successful enactment. Implementation needs include financial, organizational (e.g., senior staff support, other staff resources, etc.), and community (e.g., support from community champions, local politicians, etc.) needs. Constraints and opportunities can be divided into formal (e.g., laws, policies, formal agreements and decision-making processes, etc.) and informal (e.g., beliefs, attitudes, relationships, etc.) categories. Early stages of planning should investigate these needs, constraints and opportunities as this helps to bridge the gap between planning and enactment phases.

Monitor, evaluate and adjust

Monitoring, evaluation and adjustment stages of education and outreach allow the project team to assess the efficacy of outreach activities, keep abreast of how a community perceives a project, and make necessary adjustments. Similar to implementation matters, monitoring and evaluation tools should be built into the education and outreach plan at the beginning and throughout project planning. For example, when building a website, practitioners should monitor web traffic to confirm the efficacy of this method of communication. When reaching out to stakeholders, a contact database should be developed and maintained with information about who was contacted, when and how (e.g., telephone, email, one-on-one meetings, etc.).

The success of a particular education and outreach activity depends on matching the activity to the objective. For instance, a positive outcome for a community workshop might be that participants have a deeper understanding of the project. Three different types of evaluation to consider are:

- Process evaluation, i.e., use indicators to evaluate the execution of the outreach program (activity indicators). For example, how many stakeholders attended the workshops?
- Impact evaluation, i.e., use indicators to investigate achievement of the education and outreach objectives.
- Context evaluation, i.e., use indicators to learn how the project functions in the community and how key stakeholders perceive the undertaking. These indicators help practitioners to understand why certain approaches worked well while others did not. For example, did the effort gain support from key stakeholders?[7]

Evaluation of any given education and outreach activity is measured by how well the objective(s) are met; therefore, it is important to clearly state the objectives and define specific evaluation criteria before the activity begins.

3.2 Good Education and Outreach Practices for Aboriginal Communities

The above described principles and advice for creating and implementing education and outreach plans also apply in Aboriginal community settings; however, additional attention should be devoted to the Aboriginal cultural context. For example, a First Nation-specific education and outreach team should include the Chief and key members of Council as well as key Elders and

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[7] United States Environmental Protection Agency, 2010.

youth. In the paragraphs that follow we describe our key findings with respect to attending to the Aboriginal context in education and outreach.

Consider the Aboriginal context

Each Aboriginal community context is different and, as such, each community may have different consultation protocols (e.g., principles, processes, bylaws, templates, etc.) may be in place in different communities. A first step in education and outreach planning is to identify whether a particular community has already established guidelines for consultation. These guidelines set out a community's expectations, policies and practices that governments and the corporate sector should follow. It is important to incorporate these practices into the education and outreach strategy. Other important contextual factors to consider include the following:

- Aboriginal treaty rights,
- Overlapping or shared traditional territories,
- Existing communications and consultation protocols,
- Culturally specific beliefs, ways of knowing, knowledge and language,
- Project-specific impacts related to lands and resources, traditional knowledge, financial, cultural and political interests, and
- Chiefs, Council members, Elders and youth (i.e., include these individuals in education and outreach planning).

A genuine interest in these matters should help to build positive relationships. Additionally, attending community events, leaving assumptions behind, and letting go of a "what you should do" attitude would go a long way to engender mutual respect and trust.

Initiate early meetings

It is advisable to identify the appropriate contact as well as the process for initiating contact in an Aboriginal community. Different communities may have different protocols. For example, some First Nations expect proponents of projects to communicate with the Chief and Council first, while others may use a traditional system based on bloodline. Métis groups will also have specific communications structures in place.

Initial contact with Aboriginal communities should be in the form of an introductory letter, followed by a telephone call. Once contact has been made with the appropriate leader(s), a representative should be identified to maintain contact over the lifetime of the project.

According to Indigenous Corporate Training Inc. (2015), it may be customary to acknowledge the First Nation community and their traditional territory at the outset of any meeting. One way to show respect is to follow the traditional territory protocol greeting. For example, two First Nation protocol greetings are generally used at the beginning of any meeting. As Indigenous Corporate Training Inc. asserts, different greetings may be used, depending on the type of lands on which the meeting is taking place: treaty lands or traditional territory.[8]

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[8] Most of the information that we provide about good education and outreach practices for Aboriginal communities was derived from Indigenous Corporate Training, 2015, an excellent source for education and outreach practitioners and researchers (see references for link).

3.3 Education and Outreach Methods for Non-Aboriginal and Aboriginal Contexts

Decisions about which methods to use in education and outreach should be based on the local context and the objective(s) of a particular activity. For example, investigations of the local context may require online surveys, telephone surveys, and/or community forums – depending the needs of different stakeholders. It is also important to understand the pros and cons of different education and outreach methods. It is helpful to consider whether or not the selected method(s) and materials

- are appropriate for the target stakeholders and/or Aboriginal communities;
- are inclusive of all interested and affected stakeholders and Aboriginal individuals;
- will cover the entire target audience;
- are appropriate for the intended objective and message;
- can be distributed effectively, considering time, staff and budget needs; and
- are accessible to all.

In Appendix B we provide a list of education and outreach methods.

4. Implications for CSC-Specific Education and Outreach Materials

The guiding principles and practices that we describe above provide part of the foundation for our development of CSC-specific education and outreach materials. Specifying the above general education and outreach principles and practical considerations for the CSC Responsible Aggregate Standard and Certification process context is a matter of identifying the following:

- which organizations will be doing the education and outreach;
- the intended audience(s);
- the overarching purpose(s) of education and outreach;
- what information to share and which methods to employ, considering different audiences and overarching purposes; and
- the appropriate point(s) in the certification cycle at which to share particular pieces of information.

It is beyond the scope of this report to identify and explain each of the above considerations. Table 1 below shares a preliminary description of these matters.

Table 1. Preliminary CSC-Specific Education and Outreach Considerations

Organizations Undertaking the Education and Outreach	Intended Audiences	Purpose of Education and Outreach	Required Information	Appropriate Dissemination Methods	Key Process Points for Education and Outreach
CSC	Aboriginal, environmental, agricultural, community, aggregate industry	To provide a basic, but comprehensive understanding of CSC's Standard and Certification process To help various stakeholder groups and Aboriginal communities to engage with the Standard and Certification process	Explanation of principles, core requirements, and performance verifiers that comprise the Standard Explanation of different certification levels (CSC Registered Status and CSC Certified Status) Explanation of key aspects of the certification process	Websites and weblinks, webinars, information sheets, process diagrams, FAQs, handbooks, PowerPoint presentations, newsletters, community workshops	CSC to provide these materials on website
Aggregate industry companies	Aboriginal, environmental, agricultural, community	To educate interested and affected individuals about a particular site and the certification process To solicit information and feedback from interested and affected individuals in the certification process as per the requirements of the Standards To establish mutually beneficial relationships	Site-specific information as required by the Standards and Certification process Feedback from stakeholders and Aboriginal individuals Findings and news about the outcomes of the Certification process Long-term performance information and ongoing feedback from communities	Website, webinars, newsletters, surveys, interviews, focus groups, open houses, site visits, FAQ sheets, email	At appropriate points in the ARA/MNRF licensing process Prior to submitting the application for certification to CSC At appropriate points in the CSC certification process, as required by the Standards and the Certification manual Throughout active operation, rehabilitation, surrender of licence

As Table 1 shows, CSC and aggregate industry companies are the primary actors that require education and outreach materials and communications processes to ensure effective engagement with and implementation of the Standard and Certification system. Other organizations not included in the table include municipal and provincial public administrative bodies.

The CSC needs these materials in order to provide a basic, but comprehensive understanding of the Standards and Certification process, as well as to help various stakeholder groups and Aboriginal communities to engage with the new system. Website links, webinars, handbooks and media-based presentations, etc., may be the appropriate methods for informing stakeholders and Aboriginal communities about the components of the Standard and Certification protocol. More research is required to determine which methods and communications processes should be in place.

Similarly, aggregate industry companies require education and outreach materials and methods to educate interested and affected individuals about a particular site that is undergoing the certification process, as well as to engage, solicit feedback from and communicate with these individuals throughout the certification process. Education and outreach materials and two-way communications processes (e.g., online feedback forms, workshops, interviews, surveys, open houses, public meetings, etc.) should be embedded in the Certification process from the start of an extraction operation through to rehabilitation. Again, additional research is required to better understand which methods and communications processes should be employed.

4.1 Devoting Attention to Sustainability

The education and outreach principles and practical considerations outlined in this report may help practitioners to gain community acceptance for a particular project. On their own, however, they do not ensure that a given project will contribute positive benefits (social, economic and ecological) to community wellbeing. For this purpose, good education and outreach practices should incorporate sustainability decision criteria.

Sustainability decision criteria encourage practitioners to devote attention to the social, economic and ecological dimensions of a project, as well as how these dimensions interact across scales and sectors. In this report, we present Gibson et al.'s (2005) sustainability decision criteria, which have been applied primarily in sustainability-based assessment contexts. Gibson et al. set out eight decision criteria that practitioners can employ in any context to ensure that planning and decision making attend to a comprehensive and integrated suite of matters central to community wellbeing (see Appendix C).

In education and outreach, sustainability decision criteria can structure practitioners' investigations of the local context, to illuminate potential impacts, benefits and other community concerns. For example, practitioners can use the decision criteria as overarching categories to structure their investigations of the local context.[9] On this basis, education and outreach plans, goals and activities can be created to address all important sustainability matters.

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[9] See Gibson et al., 2008, for a detailed explanation of how Gibson's decision criteria should be specified in planning and decision making.

5. Conclusion

This report presents the findings of our review of practitioner sources that provide guidance on how to do education and outreach. In the Sections above, we described the key insights that emerged about guiding principles and practical considerations for good education and outreach practices in non-Aboriginal and Aboriginal contexts.

With respect to guiding principles, the general consensus among the information sources that we reviewed was that education and outreach processes should be

- inclusive of all interested and affected stakeholders and Aboriginal individuals;
- integrated with project management from the outset; and
- devoted to considering appropriate timing for education and outreach activities.

Some obvious concerns missing from this list, which come from the collaborative planning scholarship, include a commitment to equality in terms of how stakeholder and Aboriginal concerns are considered, transparency in decision-making process matters, consideration of alternatives, and a responsibility to ensure that all interested and affected stakeholders and Aboriginal individuals are fully informed of project details.

With respect to practical considerations, the practitioner sources that we reviewed generally prescribed the following steps in creating and implementing an education and outreach strategy:

- Assemble an education and outreach team,
- Investigate the local context,
- Develop an education and outreach strategy,
- Implement the education and outreach strategy, and
- Monitor, evaluate and adjust strategies as necessary.

We asserted that in Aboriginal settings, these principles and steps should also apply, but additional attention should be devoted to the Aboriginal context. Our findings suggested that it is important to consider key culturally specific factors including, among others:

- Aboriginal treaty rights,
- Overlapping or shared traditional territories,
- Existing communications and consultation protocols,
- Culturally specific beliefs, ways of knowing, knowledge and language,
- Project-specific impacts related to lands and resources, traditional knowledge, financial, cultural and political interests, and
- Chiefs, Council members, Elders and youth (i.e., include these individuals in education and outreach planning).

Decisions about which education and outreach materials and methods are most appropriate should be based on the local context and the objective(s) of a particular activity (see Appendix B for a full list of methods). It is helpful to consider whether or not the selected materials and

method(s)

- are appropriate for the target stakeholders and/or Aboriginal communities;
- are inclusive of all interested and affected stakeholders and Aboriginal individuals;
- will cover the entire target audience;
- are appropriate for the intended objective and message;
- can be distributed effectively, considering time, staff and budget needs; and
- are accessible to all.

Specifying the above general education and outreach principles and practical considerations for the CSC's Responsible Aggregate Standard and Certification process is a matter of considering

- which organizations will be doing the education and outreach;
- the intended audience(s);
- the overarching purpose(s) of education and outreach;
- what information to share and which methods to employ, considering different audiences and overarching purposes; and
- the appropriate point(s) in the certification cycle at which to share particular pieces of information.

The education and outreach principles and practical considerations outlined in this report may help practitioners to gain community acceptance for a particular project. On their own, however, they do not ensure that a given project will contribute positive benefits (social, economic and ecological) to community wellbeing. For this purpose, good education and outreach practices should incorporate sustainability decision criteria.

In this report, we recommend the use of Gibson et al.'s (2005) sustainability decision criteria, which dedicate attention to a comprehensive suite of matters integral to community wellbeing. Education and outreach practitioners can structure their investigations of community context and education and outreach goals around these criteria in order to ensure that their plans cover all areas of sustainability concern.

The next steps in our creation of CSC-specific education and outreach materials include a comprehensive review of the Responsible Aggregate Standard and Certification System Manual. These documents provide the substance for the materials and reveal how they should be presented by CSC as well as how education and outreach strategies should be incorporated by proponents within the CSC's Certification process.

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National Energy Technology Laboratory. (2013). Best practices for public education and outreach for carbon storage projects. US Department of Energy.

United States Environmental Protection Agency. (2010). Getting in step: A guide for conducting watershed outreach campaigns. United States Environmental Protection Agency.

Appendix A: Education and Outreach Resources Selected for Review

We selected twelve reports and one blog for our review. Below, we list the reports and blog according to the industry sector to which they belong.

Aboriginal Lands and Resources

1. Title of Report: Aboriginal Engagement Guidebook: A Practical and Principled Approach for Mineral Explorers
Link:
http://www.amebc.ca/docs/defaultsource/publications/aboriginal_engagement_guidebook.pdf?sfvrsn=4

2. Title of Report: First Nations Communications Toolkit
Link: http://www.aadnc-aandc.gc.ca/eng/1100100021860/1100100021862

3. Title of Blog: Working Effectively with Aboriginal Peoples
Links:
http://www.ictinc.ca/blog/first-nation-consultation-guidelines
http://www.ictinc.ca/blog/11-community-outreach-tips-for-aboriginal-recruitment
http://www.ictinc.ca/blog/community-engagement-for-aboriginal-recruitment
http://www.ictinc.ca/first-nation-protocol-on-traditional-territory

Carbon Storage

4. Title of Report: Best Practices for Public Outreach and Education for Carbon Storage Projects
Link: http://www.netl.doe.gov/File%20Library/Research/Carbon-Storage/Project-Portfolio/BPM_PublicOutreach.pdf

5. Title of Report: Communication, Project Planning and Management for Carbon Capture and Storage Projects: An International Comparison
Link: *http://www.globalccsinstitute.com/publications/communication-project-planning-and-management-carbon-capture-and-storage-projects*

6. Title of Report: Communication/Engagement Toolkit for CCS Projects
Link: http://www.globalccsinstitute.com/publications/communication-and-engagement-toolkit-ccs-projects

Drinking Water Source Protection

7. Title of Report: Drinking Water Source Projection: Campaign in a Box Toolkit
Link: http://conservationontario.ca/library?view=category&id=66

Energy

8. Title of Report: Suggested Best Practices for Industry Outreach Programs to Stakeholders

Link: http://www.ferc.gov/media/news-releases/2015/2015-3/07-28-15.asp

9. Title of Report: The Wind Energy Siting Handbook
Link: http://www.awea.org/Issues/Content.aspx?ItemNumber=5726

Mitigation Planning

10. Title of Report: Beyond the Basics – Best Practices in Local Mitigation Planning
Link: http://mitigationguide.org/about-this-handbook-2/

Nanotechnology

11. Title of Report: Planning Guide for Public Engagement and Outreach in Nanotechnology
Link: http://www.oecd.org/sti/nano/reports.htm

Watershed Management

12. Title of Repot: Getting in Step: A Guide for Watershed Outreach Campaigns
Link: http://water.epa.gov/polwaste/npdes/swbmp/Public-Education-and-Outreach-on-Stormwater-Impacts.cfm

Wetlands Management

13. Title of Report: Wetlands Outreach: Getting the Message Out
Link: http://www.aswm.org/iam/a-concerned-citizen/907-wetlands-outreach-getting-the-message-out-new-techniques-and-new-partners-for-the-millennium

Appendix B: List of Education and Outreach Methods

The following is a list of different education and outreach methods that practitioners can employ for different purposes at different points in a particular project:

- Training sessions for staff and/or stakeholders
- Establish a community liaison office
- Face to face interviews
- Telephone interviews
- Surveys and questionnaires (telephone, online, mail)
- Presentations at open houses
- Community forums, focus groups
- Community events
- Asset mapping exercises
- Field visits, site visits
- Websites
- Webinars
- Videos
- Social media
- TV
- Radio
- Community publications (newspapers)
- Blogs
- Government publications
- Fact sheets
- FAQ sheets
- Press releases
- Newsletters
- Letters to landowners
- Flyers
- Mail
- Reference guides and handbooks

Appendix C: Sustainability Decision Criteria

In this report we suggested that Gibson et al.'s (2005) sustainability decision criteria can be used by practitioners in order to ensure that education and outreach plans and activities consider all important sustainability matters and contribute positively to community wellbeing. Table 2 below presents Gibson et al.'s sustainability decision criteria.

Table 2. Sustainability Decision Criteria

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1. Socio-ecological system integrity: Build human-ecological relations to establish and maintain the long-term integrity of socio-biophysical systems and protect the irreplaceable life support functions upon which human as well as ecological well-being depends.

2. Livelihood sufficiency and opportunity: Ensure that everyone and every community has enough for a decent life and that everyone has opportunities to seek improvements in ways that do not compromise future generations' possibilities for sufficiency and opportunity.

3. Intragenerational equity: Ensure that sufficiency and effective choices for all are pursued in ways that reduce dangerous gaps in sufficiency and opportunity (and health, security, social recognition, political influence, etc.) between the rich and the poor.

4. Intergenerational equity: Favour present options and actions that are most likely to preserve or enhance the opportunities and capabilities of future generations to live sustainably.

5. Resource maintenance and efficiency: Provide a larger base for ensuring sustainable livelihoods for all while reducing threats to the long-term integrity of socio-ecological systems by reducing extractive damage, avoiding waste and cutting overall material and energy use per unit of benefit.

6. Socio-ecological civility and democratic governance: Build the capacity, motivation and habitual inclination of individuals, communities and other collective decision making bodies to apply sustainability requirements through more open and better informed deliberations, greater attention to fostering trust, reciprocal awareness and collective responsibility, and more integrated use of administrative, market, customary and personal decision making practices.

7. Precaution, adaptation, and innovation: Respect uncertainty, avoid even poorly understood risks of serious or irreversible damage to the foundations for sustainability, plan to learn, design for surprise and manage for adaptation.

8. Immediate and long-term integration: Apply all principles of sustainability at once, seeking mutually supportive benefits and multiple gains.

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(Gibson et al., 2005, pp. 88-121)