

## Community liaison officers team building and management guidance

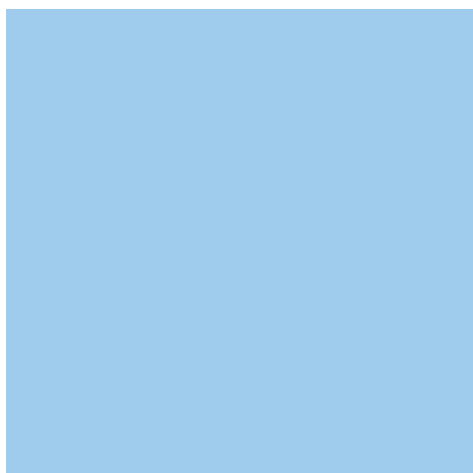


Social  
responsibility



THE GLOBAL OIL AND GAS  
INDUSTRY ASSOCIATION  
FOR ENVIRONMENTAL AND  
SOCIAL ISSUES

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# Community liaison officers team building and management guidance

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# Contents

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Executive summary	3	Section 3: The CLO team management toolkit	27
Section 1: Context and background	5	Tool 1: Master list of community-facing responsibilities	28
Understanding the context	6	Tool 2: Competency framework	28
The importance of planning and design	7	Tool 3: Job description templates	28
Structuring the team	8	Tool 4: Recruitment planner	28
Difficult questions when hiring CLOs	9	Tool 5: Training and professional development planner	28
The CLO team management cycle	11	Tool 6: CLO training pack:	
Section 2: Step-by-step guide	13	Part (a): Training guide	28
Phase 1: Establish/revise requirements	15	Part (b): Training slides	28
Phase 2: Plan/review CLO teams and job descriptions	18		
Phase 3: Recruit/train CLOs	21		
Phase 4: Evaluation/CLO feedback	25		

# Executive summary

This guidance has been developed to assist community relations managers in planning their community liaison teams and recruiting community liaison officers (CLOs). It is based on the results of a global online survey, commissioned by IPIECA, of more than 120 CLOs based in 31 countries, representing more than 25 companies and covering all stages of the project/asset life cycle. Research has highlighted the need for managers to increase their understanding of the CLO role and develop more structured approaches to CLO teams, so that CLOs can fulfil their potential, maximize their contribution to project objectives, and meet the needs and expectations of communities.<sup>1</sup>

Section 1 presents the *Context and background* to help managers negotiate the more structured guidance that follows.

Section 2 provides a *Step-by-step guide* which covers four phases of CLO team management: assessment; planning; recruitment; and evaluation.

Section 3 presents the CLO team management toolkit (summarized below) which is designed to help deliver the steps outlined in Section 2.

The toolkit comprises the following:

- **Tool 1: Master list of community-facing responsibilities**—used to help managers understand which responsibilities are required to deliver a project's community-relations goals and objectives. It can also be used to draft individual job descriptions.
- **Tool 2: Competency framework**—can help managers to: develop individual job descriptions; assess the level of competence of job candidates; build complementary CLO teams with a balance of skills and attributes; manage and monitor CLO team performance; develop targeted training programmes; and support individual professional development.

- **Tool 3: Job description templates**—offers templates for different types of CLO roles, including basic and skilled roles for the development and operations phases of a project.
- **Tool 4: Recruitment planner**—helps managers to plan the recruitment process, and includes guidance on different ways to advertise CLO recruitment, together with some suggestions for interview techniques.
- **Tool 5: Training and professional development planner**—helps managers to identify when particular types of training might be required. It also offers guidance on how to structure CLO professional development programmes.
- **Tool 6: CLO training pack**—comprises two parts: *Part (a): Training guide* and *Part (b): Training slides* which include speaker's notes and example training exercises. It has been designed to be flexible enough to allow modification as appropriate for use in different contexts.

The toolkit is designed for use in any global context. However, depending on the circumstances, flexibility will be required in using the tools. In more challenging contexts (e.g. in conflict areas or less-developed regions), companies should be prepared to invest adequate resources, provide appropriate training and allow realistic time frames to achieve optimal results and enable CLOs to reach their full potential.

<sup>1</sup> See Bebbington, C., Wilson, E., Smith, L. and Van Alstine, J. (2017). *Community liaison officers: exploring the frontline of corporate practice in the oil and gas sector*. Audire and ECW Energy Ltd, London. ISBN: 978-1-912420-27-8.





# Context and background

This section provides the context and background to help managers negotiate the more structured guidance that follows in Sections 2 and 3 of this document. It is presented in four parts:

- Understanding the context
- The importance of planning and design
- Difficult questions when hiring CLOs
- The CLO team management cycle

# Context and background

The purpose of this section is to provide the context and background for the step-by-step guide presented in Section 2 and the toolkit described in Section 3. It incorporates important research findings that will enhance understanding and inform the implementation of the guidance.

Key considerations to bear in mind when building CLO teams and recruiting CLOs include:

- allowing time for analysis and planning prior to establishing CLO teams—this may require the temporary hiring of a Community Relations Advisor;
- ensuring clarity of responsibilities and interfaces between teams, including between company and contractor teams; and
- appropriate and effective reporting and communication, both vertically (upwards and downwards) and horizontally.

## UNDERSTANDING THE CONTEXT

From the outset, it is essential to form a robust understanding of the local situation and the factors influencing the CLO role. These can be categorized in four key areas—the project, the company, society and the individual CLO—as illustrated in Figure 1.

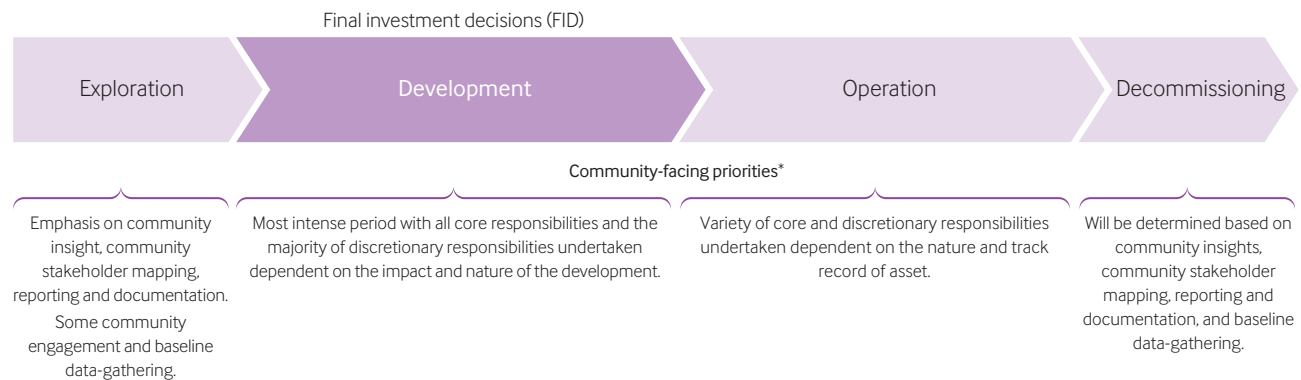
It should be emphasized that the availability of ideal candidates will vary significantly, and the talent pool from which CLOs can be recruited may be limited. It is important for managers to understand this dynamic as they plan the desired team structure and composition prior to recruitment, as the roles and structure may need to be modified, based on the specific skills and competencies of the recruited CLOs. Subsequently, if a CLO leaves the team, it may be necessary to carry out a review of the whole team’s roles and responsibilities when recruiting to fill the gap.

Figure 1 Factors influencing the CLO role





Figure 2 Project cycle



\* See also [Tool 1: Master list of community-facing responsibilities](#) for more information on each of the terms mentioned in Figure 2.

Sometimes particular CLO responsibilities emerge as being significant in the course of the work, as the project evolves and conditions change. There are obvious differences between the roles of CLOs in the development and operations phases (see Figure 2). Conditions may also change within these phases, e.g. in relation to pipeline construction reaching a particular area, a change of operatorship, the emergence of new leadership, or external factors such as an election or an outbreak of unrelated conflict.

## THE IMPORTANCE OF PLANNING AND DESIGN

Team planning is an important aspect of CLO recruitment, yet no standard ideal arrangement for building a CLO team has emerged to date, and there is little guidance on the topic of team building per se.

Building resilience within the team is a key goal of team planning. Teams need to be designed so that they take into consideration potential threats to personal safety and well-being, or challenges to personal integrity. This might include, for example, establishing delegations of authority, decision-making processes and team support structures which can address ethical and security challenges. It is also important to foster an open atmosphere where CLOs are able to raise and resolve concerns which have a direct impact on them and their ability to do their job.

Given the number of variables and the dynamic nature of the project/community interface, team planning will need to be an iterative process, based on an understanding of the local situation prior to hiring, as well as on the skills and competencies of the recruited CLOs themselves. Individual job descriptions that are drafted prior to recruitment may need to be revised once the team has been selected.

Research indicates that individual job descriptions currently used by companies tend to reflect around 80 per cent of the tasks carried out by CLOs in practice.<sup>2</sup> Other responsibilities and competencies that CLOs themselves cite as being important for working with communities are frequently not mentioned in job descriptions, or are underplayed.

The structure of CLO teams and their interfaces with other teams/functions within the organization are critical, and represent an important influence on individual CLO job descriptions. Certain community-facing functions may be fulfilled by other teams, including contractor CLO teams or external contractors (e.g. those hired to carry out land claims and resettlement work). Strong, effective links between those undertaking these activities are important.

<sup>2</sup> See Bebbington, C., Wilson, E., Smith, L. and Van Alstine, J. (2017). *Community liaison officers: exploring the frontline of corporate practice in the oil and gas sector*. Audire and ECW Energy Ltd, London. ISBN: 978-1-912420-27-8

## STRUCTURING THE TEAM

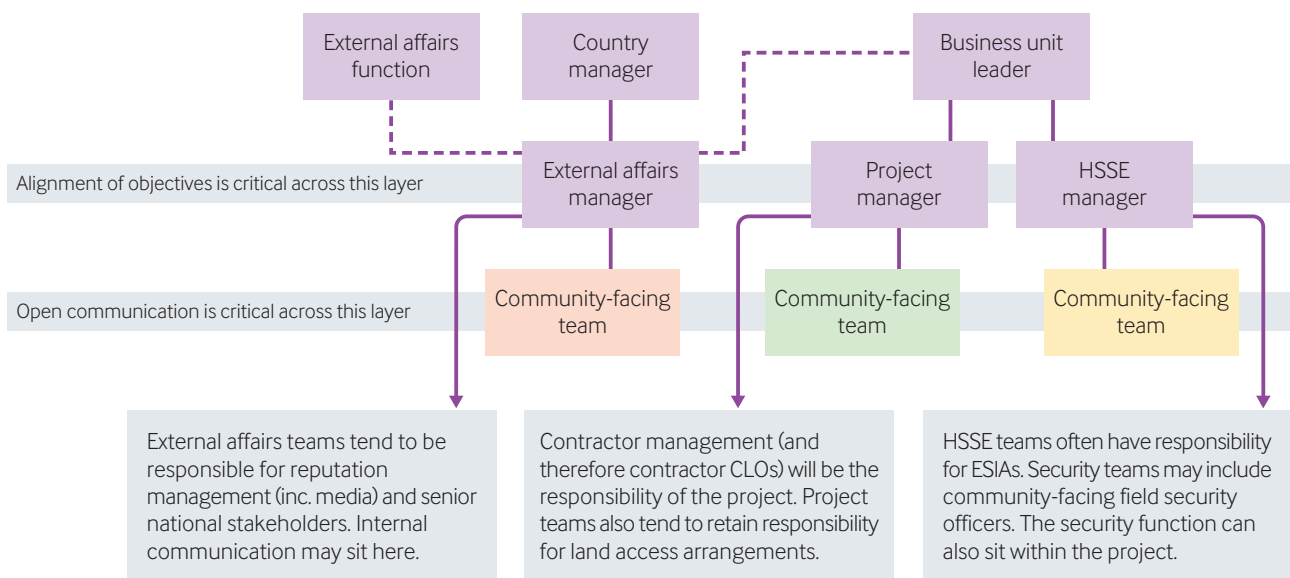
There is no ideal model for community-facing teams. Some common organizational arrangements are (see also Figure 3):

- Within the external-facing team: reporting to an in-country business unit leader or country manager; and

- Within the project team: reporting directly to the project manager or often through the project's health, safety, security and environment (HSSE) manager, or to the business unit's HSSE manager.

The eventual organizational location will depend on corporate, project and societal drivers.

Figure 3 Typical organizational options for community-facing teams



WHERE SHOULD CLOs SIT?	ADVANTAGES	DISADVANTAGES
Reporting to External Affairs Manager	External affairs teams include specialists managing other external stakeholders (e.g. government and media) and there is often overlap with community stakeholders. Direct access to the function ensures better professional support.	Not directly linked to the business. Project will manage contractors and therefore their community-related performance. May be isolated from project decisions and misaligned with project priorities.
Reporting to Project Manager	Clearly aligned with business goals. Project Manager will have substantial resources and will directly manage contractors (and their community-facing performance).	Projects may be driven by short-term goals. Reputation risk usually remains with the Country Manager and external affairs function; alignment may be difficult across teams. Weaker professional support.
Reporting to HSSE Manager	HSSE Manager works alongside field security managers. Often land and access managed by HSSE. Usually owns the environmental and social impact assessment (ESIA).	Reputation risk held by country manager—alignment may be difficult. Weak professional support.

## DIFFICULT QUESTIONS WHEN HIRING CLOs

Certain questions relating to CLO hiring have proven to be particularly difficult to resolve in generic guidance terms. For instance, should a CLO be recruited from inside or outside of the local community (see Box 1)? Such questions need to be resolved on a case-by-case basis, based on a robust assessment of the local situation and local community needs and specifics, and the availability of local talent.

A further observation relating to hiring from the community is the need to consider the potential risks of local hiring (see Box 2). While there are clear benefits of hiring CLOs from local communities (e.g. local knowledge, job creation opportunities), the risks also need to be taken into account.

### Box 1 The insider/outsider/empathizer question

The decision whether to hire CLOs from the local community or not depends on many factors, as the quote below suggests. The decision should be appropriate if it is a conscious response to corporate, project and societal requirements, and based on an awareness of any gaps/weaknesses that the chosen approach might create. An ideal team may incorporate a mix of insiders, outsiders and 'empathizers' (i.e. outsiders with considerable involvement in, and knowledge of, the locale).

From Bebbington *et al.* (2017, p.12):

*'Local knowledge is vital to building trust. Yet, although it is accepted that knowledge of the community, its culture, practices and values is essential for the CLO role, it is possible to achieve success in the CLO role without being a native of that community. This depends on the specific context, the needs of the community, and the requirements of the project. In some cases (e.g. in relation to indigenous communities) specific local knowledge and language skills may be critical, while in other cases other skills, such as knowledge of a foreign language may be just as important. A key success factor is the CLO's ability to 'fit in' with the local community. This may be done simply by spending time with the community, listening and 'being humble'.*

### Box 2 Considering the risks associated with recruiting from local communities<sup>3</sup>

The risks associated with hiring CLOs from local communities are related either to the effect of empowering local individuals relative to other community members (e.g. by creating 'gatekeepers' for project funds and opportunities), or by draining the local community of people with particular skills and competencies (e.g. foreign languages, community development experience, social/political relationship-building skills).

Empowering individuals from local communities by hiring them as CLOs can itself lead to conflicts of interest or to tensions within the community. Some community members may perceive the CLOs as favouring certain parts of the community over others, or occupying an elite position in the community themselves, with access to power and privileges.

If CLOs work closely with elected officials, e.g. on social investment spending, there is a risk of project benefits being used as a tool during election periods. Managers should identify and develop mitigation measures to address these risks.

<sup>3</sup> Sources: IFC (2007). *Stakeholder engagement: a good practice handbook for companies doing business in emerging markets*. International Finance Corporation, Washington D.C.; Agade, K.M. (2014) "Ungoverned Space" and the oil find in Turkana, Kenya. In *The Round Table*, Vol. 103, No. 5, pp. 497-515; Ganson, B. and Wennmann, A. (2016). *Business and conflict in fragile states: the case for pragmatic solutions*. International Institute for Strategic Studies, London.

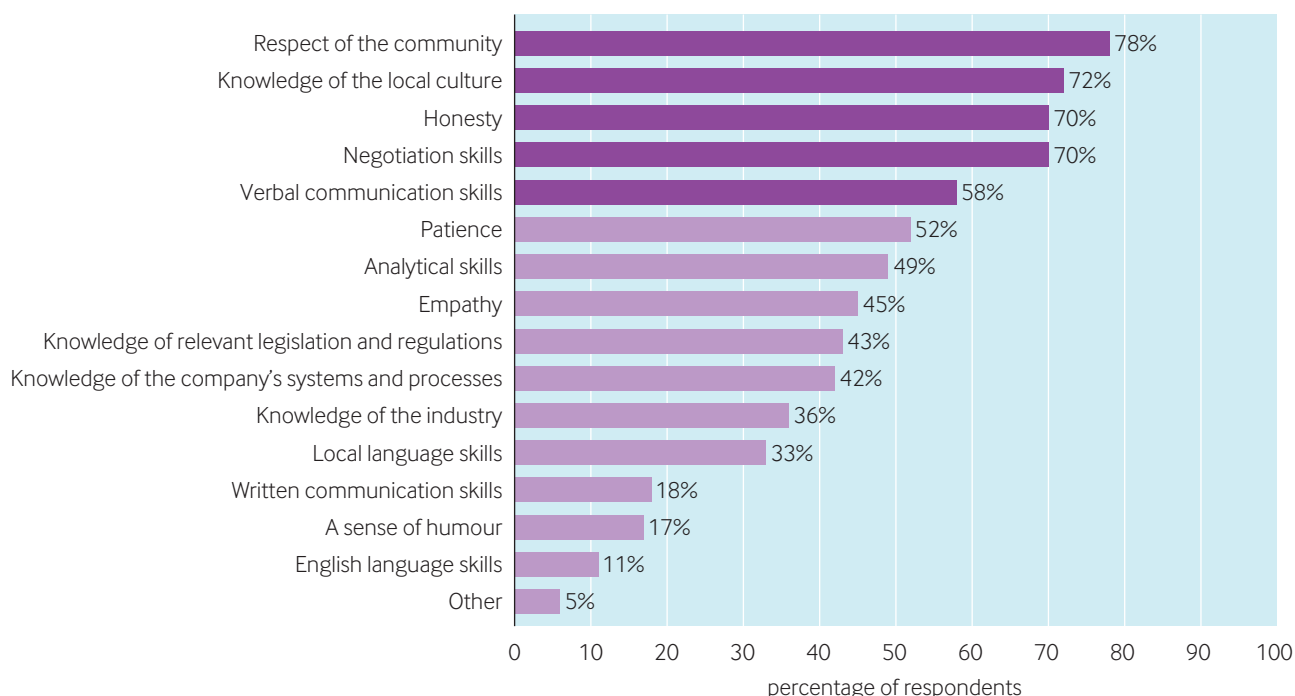
Another question that elicits diverse responses relates to the qualities or competencies that a CLO ought to possess. Figure 4 illustrates the responses from a survey asking CLO respondents to prioritize a given list of qualities.<sup>5</sup> The most highly prioritized qualities were: having the respect of the community; knowledge of local culture; honesty; negotiation skills; and verbal communication skills.

It is rare to find all the required skills and knowledge within one individual, and so a balance must be sought, with priority given to certain competencies or skills over others. For instance, in some cases knowledge of the project language (e.g. English, French or Spanish) may be essential. In other cases, a candidate may have exceptional qualities and valuable local knowledge, but no knowledge of the project language. Knowledge of local culture is an important skill, yet strong candidates with a good knowledge of local culture may have very little knowledge of the oil and gas industry.

A further challenge is to ensure that all the possible candidates with potentially valuable skills find out about any CLO hiring opportunities. Standard job advertising approaches (e.g. advertising in national newspapers or via government employment agencies) may not reach some of the potential candidates in the local communities themselves, especially if the communities are isolated, or if there are significant language barriers.

Some skills and knowledge can be taught relatively quickly during training after hiring (e.g. knowledge of the company and the project). The respect of the community can be earned over time, and local knowledge developed, if the CLO possesses the qualities of honesty, integrity and empathy. These qualities, however, may be difficult to test out in an interview.

Figure 4 The top five most important qualities of a CLO: the CLO view



<sup>4</sup> Global online survey, commissioned by IPIECA, of more than 120 CLOs based in 31 countries, representing more than 25 companies and covering all stages of the project/asset life cycle.



### Box 3 Considerations when CLO employment comes to an end

A CLO that was originally hired from within the local community may return to live in the local community after leaving the company. As such, he/she will remain a key stakeholder. Managers will need to be aware that such an individual will possess a great deal of knowledge about the company, and will be able to use that knowledge in positive or negative ways. The individual may seek election as a local political figure. It is important to ensure that good relations are maintained with that person, even if he/she had been dismissed from the job, left because they were unsatisfied with the job for some reason, or had been made redundant for reasons that they are unhappy with. The company may wish to provide assistance to the individual in finding alternative employment. This will be particularly important if a number of CLOs are laid off due to a change in circumstances, e.g. the shift from the development phase to the operations phase.

In some cases CLOs have been laid off due to a reduction in the project budget and/or an unexpected project closure. CLO teams should not be disbanded suddenly if a project finds itself in financial difficulties and withdraws financial support from social investment programmes, or withdraws completely from a community. On the contrary, these are the times when CLOs are needed more than ever to engage with the community and respond to their concerns. It is therefore important for managers to assess the risks adequately before disbanding teams in critical periods with a high risk of community anxiety and confusion, when doing so could easily lead to tension, protest and violent conflict.

A difficult question that, as yet, has not been fully explored is the question of what happens when CLOs stop working for the company, either of their own volition or because their contract or employment has been terminated by the company. This is an area for further work, but some considerations need to be highlighted (see Box 3).

This approach is flexible enough to respond to corporate, project and societal drivers and to feedback from CLOs themselves. In other words, managers should decide what they need, select team members who most closely meet that need, then check to see if there are any remaining gaps, risks or weaknesses in the team and address them.

## THE CLO TEAM MANAGEMENT CYCLE

This guidance offers a flexible and iterative approach to creating community-facing teams. The approach is based on the CLO team management cycle (see Figure 5 on page 14). This comprises four key phases:

1. Establishing the requirements for the CLO team, based on understanding the context.
2. Planning CLO teams and job descriptions.
3. Recruiting and training CLOs.
4. Evaluation, incorporating CLO feedback.

The evaluation leads back to the first phase, which would then involve a review and revision of requirements, modification of teams and job descriptions, and retraining of CLOs, if required.

The approach is described in more detail in Section 2, in the form of a step-by-step guide based on the four phases of the CLO team management cycle listed above. Section 3 describes the six tools that have been designed to deliver the steps outlined in Section 2.



# Step-by-step guide

This section describes the various steps involved in each of the four phases of the CLO team management cycle.

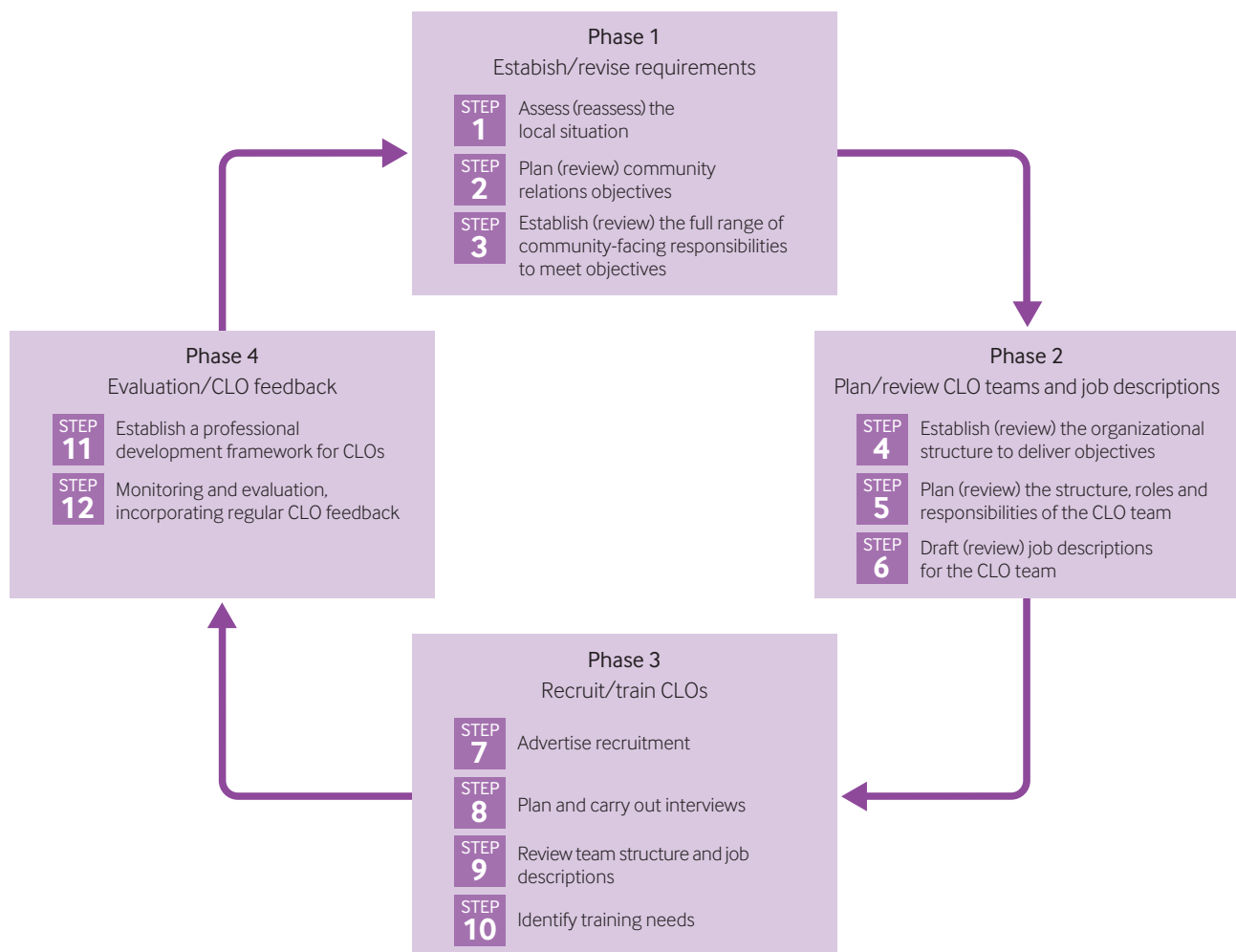


# Step-by-step guide

This section describes the key steps that make up the four phases of the CLO team management cycle (see Figure 5). In each of the steps, the terms in brackets (e.g. 'reassess', 'review', etc.) relate to activities that take place in subsequent rounds of the cycle following the first evaluation.

The cycle is a guide only and not all phases will need to be followed in the same order all the time. The cycle simply emphasizes the need to continually review requirements, team structures, roles and responsibilities to make sure that they remain fit for purpose, particularly given the dynamic nature of the corporate/community interface.

Figure 5 The key steps that make up the four phases of the CLO team management cycle



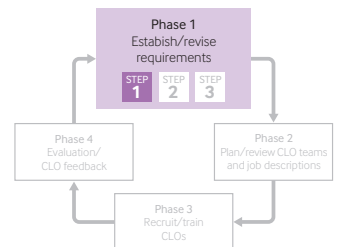


## Phase 1: Establish/revise requirements

### STEP 1 ASSESS (REASSESS) THE LOCAL SITUATION

Prior to designing CLO teams and recruiting CLOs, managers will need to carry out a needs, risks and capacities assessment of the local community. This will help to determine the range and types of roles that CLOs and other community-facing teams will need to carry out, as well as the potential for hiring CLOs from the local community. It is important to liaise with social impact assessment consultants if they are carrying out similar research at the same time. It may be beneficial to hire a temporary Community Relations Advisor to inform the analysis and subsequent decision-making.<sup>5</sup>

In subsequent rounds of the CLO team management cycle, reassessment will be based on ongoing analysis and monitoring of the local situation, and on feedback from CLOs and community members.



#### Questions to consider:

- What are the applicable laws and regulations (e.g. land rights and land-use regulations; community consultation/consent requirements)?
- What is the local socio-economic, cultural and political situation (e.g. traditional land-use practices; leadership structures; pre-existing conflicts)?
- What are the likely impacts of the project, both positive and negative, on local communities?
- Are there any features of the local situation that may pose a risk to CLOs working in the community/communities (e.g. high levels of community tension or crime; risk of disease; poor sanitation)?
- What skills and capacities are present among the local workforce, including skills and capacities suitable for carrying out CLO work?

<sup>5</sup> At the national level, this could be a sociopolitical relations advisor.

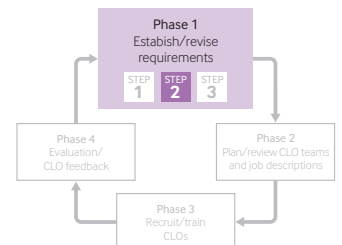
## Phase 1: Establish/revise requirements

### STEP 2

#### PLAN (REVIEW) COMMUNITY RELATIONS OBJECTIVES

CLO team design needs to be based on strategic planning of the goals and objectives to be delivered by the CLO team (in collaboration with other teams as required).

It is important to review goals and objectives at critical points in the project cycle, such as the transition from development to operations, at which point the CLO team may need to be restructured or their roles and responsibilities revised. However, it is also important to carry out reviews on a regular basis. Some modification of strategic programmes supported by the CLOs may be required, for instance, based on community feedback (positive or negative) or changes in circumstances that may not have been predicted from the outset.



#### Planning needs to take into account the following questions:

- What is the nature of the project overall, and what key phases will frame the shape and purpose of the CLO team (e.g. exploration, development, operations, decommissioning)?
- What is the overall time frame for the project, and the time frames for individual project phases?
- What are the goals and objectives of the community relations function of the company and project?
- What strategic programme(s) will the CLOs be supporting to deliver these goals and objectives (including those determined by any financing arrangements)?
- Which other teams will the CLO team need to engage with to deliver these goals and objectives (including other community-facing teams and other relevant entities, such as security providers)?

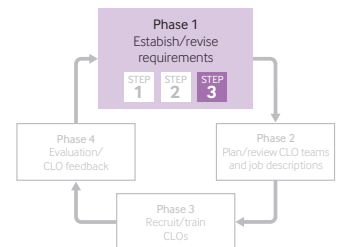
## Phase 1: Establish/revise requirements

### STEP 3

#### ESTABLISH (REVIEW) THE FULL RANGE OF COMMUNITY-FACING RESPONSIBILITIES TO MEET OBJECTIVES

The basis for CLO team building should be a master list of responsibilities that need to be covered by community-facing teams, including the CLO team and other teams as appropriate. This list is developed through analysis of the socio-economic, cultural and political situation and the nature of the project and strategic programmes to be implemented. Guidance on compiling such a master list is provided in [Tool 1: Master list of community-facing responsibilities](#). Prior to building a CLO team, managers will need to develop and test their own project-specific master list. This may require advice from a Community Relations Advisor.

Managers should regularly test the master list with CLOs and other teams to ensure that it covers all the necessary responsibilities required to deliver the project's community-relations goals and objectives, as the project progresses and in the light of any changes in circumstance.



#### Questions to consider include:

- Which of the responsibilities listed in [Tool 1: Master list of community-facing responsibilities](#) are required to deliver the desired community relations goals and objectives of the given project?
- Are any potential responsibilities missing? If so, these should be added.
- Are there any limitations or risks created by budget constraints (e.g. identified responsibilities that cannot be funded by the given budget for community relations activities)? If so, these should be discussed with senior management.
- Are there any logistical or health and safety constraints to visiting communities (e.g. transport, terrain, road safety risks)?

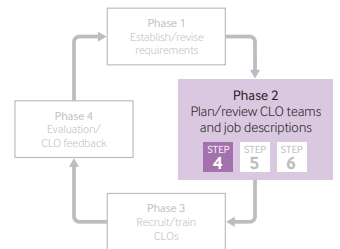
## Phase 2: Plan/review CLO teams and job descriptions

### STEP 4

#### ESTABLISH (REVIEW) THE ORGANIZATIONAL STRUCTURE TO DELIVER OBJECTIVES

Before planning the structure of the CLO team, managers will need to establish what the overall organizational structure of community-facing functions will be. This includes potential roles to be played by other corporate teams, as well as contractors, consultants and external parties. Figure 3 on page 8 might help managers to think through the pros and cons of different organizational configurations and their ability to deliver on community-relations goals, as well as to consider how the CLO team will fit within that organizational structure.

Lines of communication between responsible parties should be tested regularly, for instance in scenario planning relating to incident and crisis response. If other teams change their activities, this may require CLOs to take on further responsibilities, and vice versa.



#### Questions to consider include:

- Which community-facing responsibilities need to be covered by the CLO team itself and which responsibilities will be covered by other teams, including contractors and consultants?
- Are there any areas where it is not clear who has responsibility for delivery?
- How will reporting and communication take place between community-facing teams?
- Will security be provided by government or private security providers? How will the CLO team communicate and engage with the security providers?
- Which external entities, such as government regulators or civil society organizations, will affect or closely relate to the work of the CLO teams (for instance, independent third-party monitoring groups, government liaison offices)? How will communication take place with these external entities?



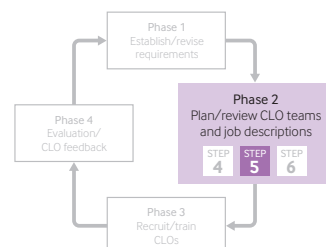
## Phase 2: Plan/review CLO teams and job descriptions

### STEP 5

#### PLAN (REVIEW) THE STRUCTURE, ROLES AND RESPONSIBILITIES OF THE CLO TEAM

Establish which of the responsibilities listed in the (project-specific) master list will be covered by the CLO team. It is important to ensure that all responsibilities identified in the (project-specific) master list are allocated either to the CLO team, or to other teams as appropriate. Once this division of responsibilities has been established, the structure of the CLO team, its relation to other teams, and the roles and responsibilities of the CLOs can all be mapped out.

Once the team of CLOs has been recruited, the structure, roles and responsibilities should be reviewed in light of the specific skills, attributes and experience that the recruited CLOs bring to the table (see Step 9 on page 23). They should also be reviewed on a regular basis to ensure that they are meeting the project's community-relations goals and objectives, and continue to meet the community's needs so that community feedback remains positive. The CLO team should also be reviewed in response to internal and external changes in circumstance.



#### Questions to consider include:

- How many CLOs will be required to fulfil the desired set of responsibilities?
- Will the CLOs within the team have similar roles and responsibilities, or will there be specialisms?
- Will CLOs be assigned to particular communities? How many communities will they serve and how often will they visit? Will there be a rotational/back-to-back arrangement?
- How will gender balance and other forms of diversity be ensured within the team? How will the interests of various community groups including vulnerable groups be represented?
- What will the CLO team manager be responsible for? Will he/she be located with the team or in another location? How will they communicate?
- Will administrative/logistics support staff be required to serve the CLO team uniquely, or will these services be delivered by another team?

## Phase 2: Plan/review CLO teams and job descriptions

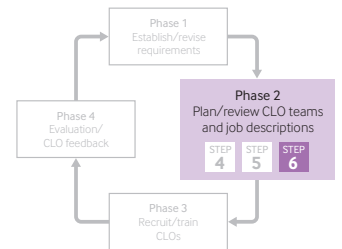
### STEP 6

#### DRAFT (REVIEW) JOB DESCRIPTIONS FOR THE CLO TEAM

Job descriptions for individual members of the CLO team should be designed to complement one another and to cover the responsibilities required to deliver desired goals and objectives, as appropriate to the phase of the project (e.g. development or operations).

**Tool 2: Competency framework** can help managers to: develop individual job descriptions; assess the level of competence of job candidates; and build complementary CLO teams with a balance of skills and attributes. **Tool 3: Job description templates** can be used for guidance on the responsibilities that might be included in the job descriptions, along with the skills, attributes and experience required to ensure delivery of the required responsibilities. Individual job descriptions should be finalized after the interview process has been completed, as much will depend on the relative skills and strengths of the CLOs who are hired.

Individual job descriptions should be reviewed on a regular basis and may be modified in response to changing internal and external circumstances. Feedback should also be obtained from the CLOs themselves, either through a standard appraisal process or via regular (e.g. quarterly) 'catch up' meetings (see Step 11 on page 25).



#### Questions to consider include:

- Which responsibilities will (ideally) be included in each individual job description and how will the individual job descriptions complement one another?
- Which skills, attributes and experience will (ideally) be required to deliver the required responsibilities effectively?
- Will the team (ideally) be made up of mostly Level 2 (basic) CLOs, mostly Level 3 (skilled) or a combination of both?
- What capacities does the company have to train CLOs immediately following recruitment (i.e. induction) and in which skills can training be provided?
- What level of authority will CLOs have? What will they need to seek management permission to do? What decisions will they have the authority to make alone? Will individual CLOs be responsible for their own budgets and, if so, to what degree?
- Which administrative tasks will CLOs be expected to carry out themselves, and which will be provided by an administrative function (within or outside the team)?

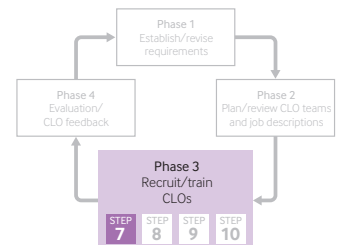
## Phase 3: Recruit/train CLOs

### STEP 7 ADVERTISE RECRUITMENT

Recruitment of CLOs can be advertised via established channels, such as government employment agencies and newspapers, but these may not reach the local communities. It is important to be able to inform all local communities about CLO recruitment, as local knowledge is a key requirement, and the role of CLO is a key potential job opportunity for local people. Recruiting for CLOs locally can be a challenge if the communities are isolated and difficult to reach. Options for reaching local candidates might include community notice boards, radio stations, or word of mouth via existing local workers.

Managers may already be inclined towards or against hiring CLOs from the local community, but should try to keep an open mind and encourage insiders, outsiders and empathizers<sup>6</sup> to apply for CLO jobs in the first instance. [Tool 4: Recruitment planner](#) offers possible ways in which CLOs might be recruited, together with the pros and cons of each method.

The same procedures should be followed for subsequent hiring, if it becomes necessary owing to a CLO leaving or circumstances requiring additional CLO(s).



#### Questions to consider include:

- Where is/are the local community/communities located?
- Which channels are available for wide dissemination of job advertisements (e.g. regional/national newspapers, employment agencies)?
- What are the commonly used channels for local hiring and other local community notices (e.g. community notice boards, newspapers, radio, via local leaders and elders, community meetings)?
- Can existing project workers help to disseminate notices of CLO recruitment?

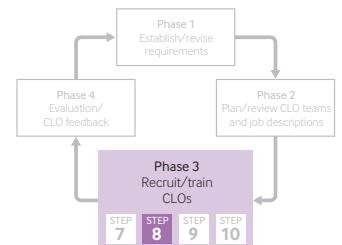
<sup>6</sup> See Box 1 on page 9 for more on insiders, outsiders and empathizers.

## Phase 3: Recruit/train CLOs

### STEP 8 PLAN AND CARRY OUT INTERVIEWS

A key challenge is how to build a full appreciation of a candidate's skills, attributes and experience during an interview process, particularly if these include personal characteristics such as integrity and resilience. [Tool 4: Recruitment planner](#) suggests a number of interview techniques for providing insights into candidates' skills and attributes.

[Tool 2: Competency framework](#) can assist in assessing the level of competence of the candidates and how they compare to one another in specific thematic areas. It can also assist managers in establishing robust and effective teams, by incorporating a range of complementary skills and attributes within the team, and by recognizing how the strengths and weaknesses of some may balance the different strengths and weaknesses of others.



#### Questions to consider include:

- Which skills and competencies are a priority for hiring, and which can be developed through a period of training once CLOs have been hired?
- What are the key competencies to be tested in the interviews, and what is the best way to test these out?
- Will all candidates be tested in the same way? How can interviews be designed to accommodate (and not discourage) candidates who might be strong in some areas (e.g. local language knowledge) but not in others (e.g. written exercises)?
- To what extent should (and can) candidates be assessed together, so as to help managers to understand how they interact with one another? What is the optimal way to do this?
- Who should carry out the interviews? Does there need to be at least one interviewer who can hold the interview in the local language(s)?



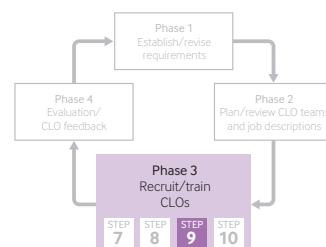
## Phase 3: Recruit/train CLOs

### STEP 9 REVIEW TEAM STRUCTURE AND JOB DESCRIPTIONS

Job descriptions and team structures need to be refined to optimize the skills and personalities of the individual CLOs who are hired, and to ensure complementarity between them. Managers should wait until the interview process has been completed before finalizing the composition of the team, the relative responsibilities of team members, and the individual job descriptions.

It may also be the case that teams are hired over a period of time, so there may be some reviewing and revising during this period. The entire process is thus iterative and requires considerable thought. *Tool 2: Competency framework* can help managers to finalize the team structure and ensure that roles and responsibilities are allocated in a way that makes best use of the complementary skills and attributes of the CLOs who have been hired.

It is essential that the team structure and job descriptions are reviewed regularly to ensure that they continue to meet the requirements established in Steps 1–3 (see Step 12 on monitoring and evaluation, on page 26).



#### Key questions for consideration include:

- Are the recruited CLOs insiders/outside/empathizers?<sup>7</sup> Do they mirror community power structures and elites? How will the interests of vulnerable groups be represented?
- Do any gaps need to be filled through training (see Step 10 on page 24), further hiring or collaboration with other teams? How will responsibilities be distributed within the team?
- Is the available budget sufficient to support the recruited team to fulfil the desired roles and responsibilities?
- Does the proposed team structure pose any risks for the well-being of CLOs, e.g. potential lack of back-up support? How can these risks be addressed prior to starting work?
- How do the CLOs relate to, and interact with, their team manager and other relevant managers (e.g. location and communication lines)? Do they have the appropriate levels of authority to make decisions in challenging situations?
- Do the team structure and job descriptions address the requirements established in Steps 1–3? Will they serve to minimize project risks, especially in times of change with a high risk of tension in the community?

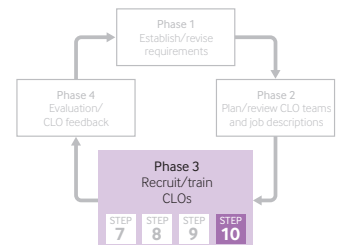
<sup>7</sup> See Box 1 on page 9 for more on insiders, outsiders and empathizers.

## Phase 3: Recruit/train CLOs

### STEP 10 IDENTIFY TRAINING NEEDS

Giving CLOs the appropriate tools, techniques and language will allow them to contribute fully and demonstrate their value to project and asset teams. *Tool 5: Training and professional development planner* will help managers to plan appropriate training at specific points following recruitment (i.e. induction) and at further key stages, as required. It is also important for managers to be responsive to CLOs themselves and to enable them to raise issues and requests for specific training and support. It is likely that different CLO team members will have quite different training needs, and while some training can be carried out in groups, other training will be more effective on a one-to-one basis.

*Tool 6: CLO training pack* comprises two parts: *Part (a): Training guide* and *Part (b): Training slides* including speaker's notes and example exercises. It has been designed to be flexible enough to allow modification as appropriate for different training needs.



#### Key questions include the following:

- What are the most evident skill gaps among the newly recruited CLOs? What should the CLO induction consist of?
- What training is likely to be needed later on, e.g. six months into the job? What training is essential for the CLO induction and what can be saved for a later date?
- What feedback structures and lines of communication are in place for CLOs to identify training needs once they have started their job?
- What is the most efficient and effective way to carry out CLO training? What opportunities are there for online training?
- What training should be carried out in groups, and what needs to be undertaken in a more tailored fashion on a one-to-one basis?
- Can the CLOs themselves help with training, if some have skills that they can share with others?

## Phase 4: Evaluation/CLO feedback

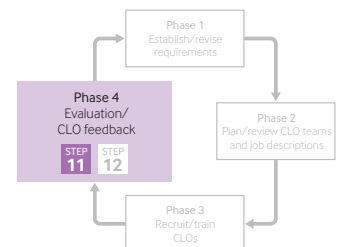
### STEP 11

#### ESTABLISH A PROFESSIONAL DEVELOPMENT FRAMEWORK FOR CLOs

A professional development framework should have at its core a process of regular appraisal of CLOs, which can provide a key opportunity to elicit CLO feedback on their roles and responsibilities. Good practice today is more of a regular (e.g. quarterly) 'catch-up' rather than relying solely on an annual formal appraisal. The individual appraisal/feedback process can also be a key tool for building more effective teams overall.

*Tool 5: Training and professional development planner*, can help managers to design and implement professional development processes. It can help them to understand and address CLO expectations; enhance processes of internal recognition, enabling full valuation and appreciation of the CLO role; and enable appropriate levels of career development. *Tool 2: Competency framework*, also helps with this by setting out an ideal set of skills and attributes required to carry out a particular role effectively, presenting these in such a way that employees can progress from one level to the next. A culture of transparency, trust and good communication needs to be at the heart of the professional development framework.

Managers will need to maintain good communication with CLOs to encourage feedback, identify further training needs and to plan support as it is required.



#### Questions to consider:

- Are the CLOs adequately performing all the required tasks, i.e. from their own perspective, and also from the perspective of colleagues and the community?
- If there are any difficulties and challenges, what are the causes and how can these be addressed?
- What support do CLOs say that they need (e.g. from managers/administrators)?
- What do CLOs say about their own well-being, e.g. stress levels?
- Is communication between CLOs and between teams adequate to address issues and maintain a good understanding of the situation on the ground?
- What are the needs and perceptions of the community regarding the work of the CLO(s) in their community? Have they made any suggestions about how to improve the work of CLOs?

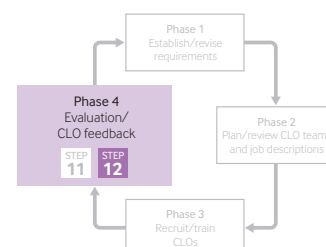
## Phase 4: Evaluation/CLO feedback

### STEP 12 MONITORING AND EVALUATION, INCORPORATING REGULAR CLO FEEDBACK

CLO managers will need to develop a monitoring and evaluation framework for the work of the CLO team. This should include a set of indicators to cover CLO well-being, community satisfaction, and the delivery of project goals and objectives. Such a framework will also need to factor in the assessment of other teams with community-facing responsibilities.

Various well-established monitoring and evaluation tools which can contribute to this overall framework include: CLO reporting; day-to-day community feedback; the community grievance mechanism; and third-party community monitoring. A key tool will be the individual CLO appraisal/feedback process (see Step 11 on page 25).

Monitoring and evaluation need to take place formally on a regular basis, and informally on an ongoing (daily) basis. Managers will need to maintain good communication with CLOs to encourage feedback and to plan support as it is required.



#### Key questions to consider:

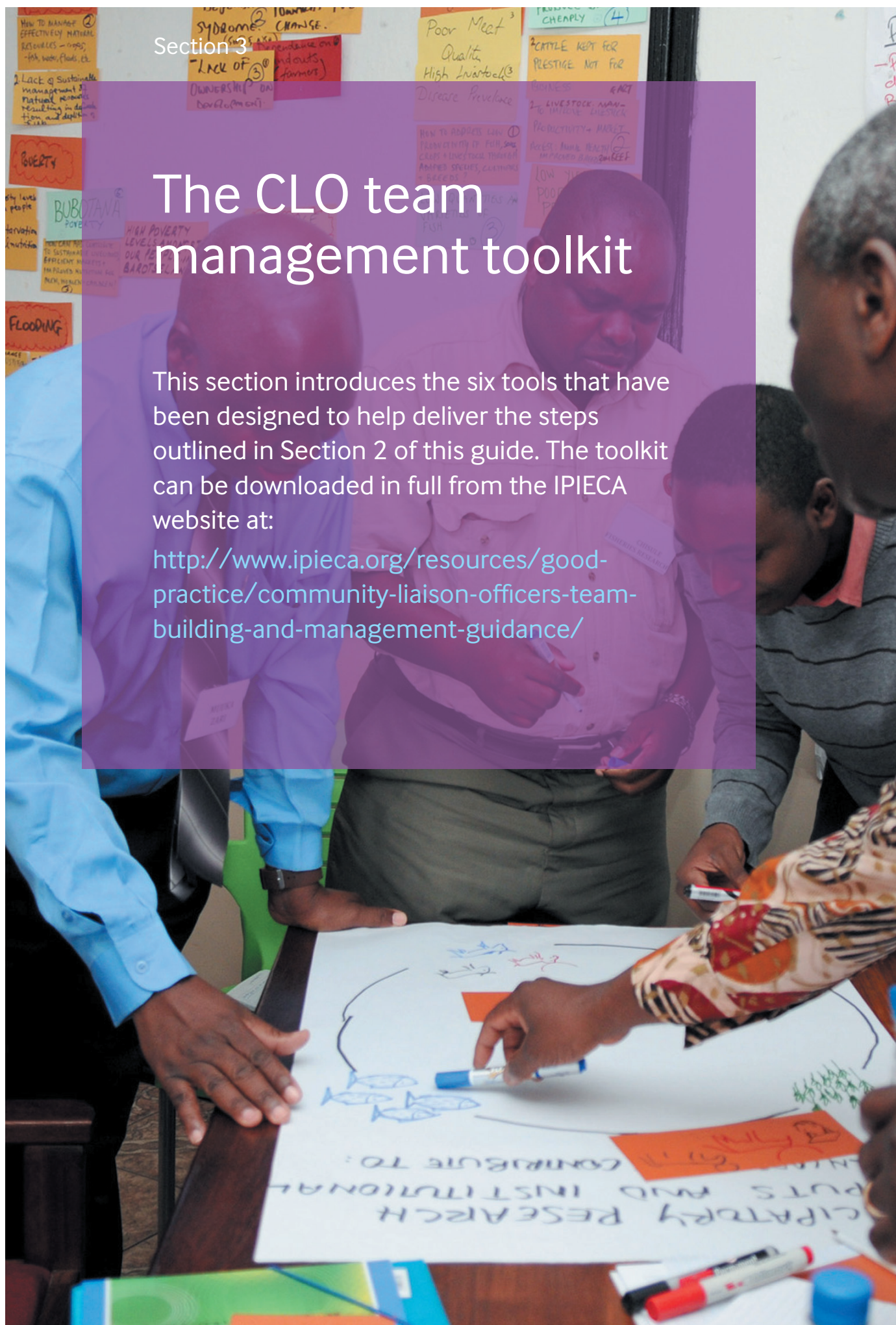
- To what extent does the existing team structure, along with individual CLO job descriptions and current levels of performance, meet the requirements established in Steps 1–3?
- How are CLOs coping with the job, from the perspective of delivering the project goals and objectives, building trust and respect within the community, dealing with stress, and maintaining personal and team resilience?
- What kind of feedback is coming from the community regarding the situation in general, their views of the project, and the work of the CLO team and individual CLOs?
- What can be learned from the community grievance mechanism?
- What third-party community monitoring is taking place and what does it reveal about the situation in the community and the work of the CLO team?



# The CLO team management toolkit

This section introduces the six tools that have been designed to help deliver the steps outlined in Section 2 of this guide. The toolkit can be downloaded in full from the IPIECA website at:

<http://www.ipieca.org/resources/good-practice/community-liaison-officers-team-building-and-management-guidance/>



# The CLO team management toolkit

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The purpose of each tool in the CLO team management toolkit is summarized below.

The toolkit can be downloaded in full from the IPIECA website at:

<http://www.ipieca.org/resources/good-practice/community-liaison-officers-team-building-and-management-guidance/>

## Tool 1: Master list of community-facing responsibilities

**Tool 1** is used to help managers understand which responsibilities are required to deliver a project's community relations goals and objectives. It can also be used to draft individual job descriptions.

## Tool 2: Competency framework

**Tool 2** can help managers to: develop individual job descriptions; assess the level of competence of job candidates; build complementary CLO teams with a balance of skills and attributes; manage and monitor CLO team performance; develop targeted training programmes; and support individual professional development.

## Tool 3: Job description templates

**Tool 3** offers templates for different types of CLO roles, including basic and skilled roles for the development and operations phases of a project.

## Tool 4: Recruitment planner

**Tool 4** helps managers to plan the recruitment process, and includes guidance on different ways to advertise CLO recruitment, together with some suggestions for interview techniques.

## Tool 5: Training and professional development planner

**Tool 5** helps managers to identify when particular types of training might be required. It also offers guidance on how to structure CLO professional development programmes.

## Tool 6: CLO training pack

This tool comprises two documents:

**Part (a): Training guide**—a guide for trainers, including example exercises.

**Part (b): Training slides**—a set of PowerPoint™ slides with speaker's notes.





# IPIECA

IPIECA is the global oil and gas industry association for environmental and social issues. It develops, shares and promotes good practices and knowledge to help the industry improve its environmental and social performance, and is the industry's principal channel of communication with the United Nations.

Through its member-led working groups and executive leadership, IPIECA brings together the collective expertise of oil and gas companies and associations. Its unique position within the industry enables its members to respond effectively to key environmental and social issues.

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Baker Hughes	Kosmos	Sapia	WPC
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