

The workshop will be starting soon!



Send us your questions and comments throughout the workshop in the chat box or raise your hand.



We will confirm if all are comfortable with recording and we will email you a recording of this webinar.



SoCaIREN Community-Based Design Collaborative

Program Administrator Workshop
October 7, 11:30am - 1:30pm



Community-Based
Design Collaborative



Workshop Objective

Pursuant to CPUC Decision (D.) 23-06-055

Southern California Regional Energy Network shall coordinate with the Community-Based Design Collaborative [CBDC] and with the other portfolio administrators to structure a process for community-based programs for all areas covered by the Commission's energy efficiency programs, for proposal in their 2028-2031 portfolio applications.

Workshop Outline and Speakers

- I. Establishing the Collaborative Framework
- II. Identifying Collaborative Members
- III. Collaborative Meetings
- IV. Initiative Design & Proposal
- V. Next Steps



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Establishing the Collaborative Framework



Direction from the CPUC

Pursuant to CPUC Decision (D.) 23-06-055

Because of their nature of being more locally-focused, we expect that RENS are uniquely positioned to make progress on this issue. Therefore, we will direct one of our original RENS, SoCalREN, to establish a Community-Based Design Collaborative (Collaborative) to recommend, via a Tier 2 advice letter, a process for funding community programs and to pilot the approach in 2026 and 2027 for potential rollout in the future as a statewide initiative.

SoCalREN Alignment with the Collaborative

Mission

SoCalREN is developing an opportunity to make the transition to a clean energy future a more collaborative process!



Problem statement:

Historically, energy programs have been designed with limited customization, often overlooking the unique needs of California's diverse regions

End goal:

Develop more impactful programs that directly reflect and address the priorities of communities, shaped by community input and lived experience

Core Objectives of the SoCalREN Collaborative

Our goal: Develop a framework for working with community-based organizations (CBOs) to identify and fund locally-focused energy programs and recommend a scalable community-driven process to develop energy program initiatives.

Objectives:

- Facilitate discussions to gather input and insights from CBOs on equitable program design.
- Develop key elements of the framework guidelines, tools, and processes for program design.
- Deepen connections between CBOs, public agency stakeholders, and potential funding opportunities.
- Learn from the broader regions served what the energy-related gaps and needs are in the community.
- Achieve overall alignment with the CPUC ESJ Action Plan to improve program administrators' ability to serve ESJ communities and remove barriers to access to clean, safe, and affordable utility services

Greenlining Institute Support

The Greenlining Institute is a national nonprofit committed to building a just and equitable future, supporting under-resourced communities to develop capacity and lead their transformations.

- **Role:** Advise on the development of collaborative structure, procedure, and equitable participation
- **Support:** Development of materials and trainings, identifying and vetting criteria for members, and program proposals

Key Milestones of the Collaborative

SoCalREN developed a framework to work with CBOs to identify and fund locally-focused energy program initiatives



Program Administrators & Facilitators Support

Build Capacity

Facilitate learning of energy programs, regulations, and funding; dedicate time for foundational EE education.

Provide Technical Support

Offer mentorship, 1:1 coaching, workshops, and guidance on proposals, budgeting, metrics, and partnerships.

Foster Peer Learning

Create spaces for members to share best practices and co-develop strategies.

Ensure Inclusive Participation

Compensate members with stipends to support smaller organizations' engagement.

Handle Logistics

Manage facilitation and meeting operations so members can focus on innovation.

Strengthen Connections

Link members with implementers, technical partners, and local governments for future collaboration.

Recommended Timeline

Timeline	Phase	Activities
3 months	Establishing the Collaborative framework	<ul style="list-style-type: none"> Define objectives/scope Establish compensation models and expectations for collaborative members Identify needed facilitation support and resources Select region(s) to target
5 months	Identify partners	<ul style="list-style-type: none"> Research existing CBOs in selected region(s) Develop engagement and marketing materials Outreach to potential collaborative members Finalize participating organizations
6 months	Collaborative meetings	<ul style="list-style-type: none"> Facilitate Collaborative meetings Provide technical support and capacity building education for Collaborative members to set a base knowledge and understanding
2 months	Community engagement and needs assessment	<ul style="list-style-type: none"> CBOs conduct outreach in their communities to verify local needs and priorities Share outreach resources
2 months	Program development and proposal prep	<ul style="list-style-type: none"> Support in shaping ideas into formal proposals Provide assistance with budget planning, establishing metrics/methodology, and alignment with admin goals/expectations

Preparing for Kickoff and CBO Outreach

- Ensure objectives are clear
- Identify the stipend structures that make the most sense
- Develop messaging and speaking points for CBO outreach
- Collect leads and recommendations from Greenlining and other partners

Potential Barriers & Strategies to Address

Potential Barrier	Strategies to Address
Historical compensation lessons learned	Milestone-based payments
In-person attendance	In-person location has ideal setup for hybrid meetings
Funding clarifications	Agreed upon message for a distinction between SoCalREN and CPUC funding
CBO person-of-contact change	All materials packaged in an easily digestible format to facilitate 1 on 1 capacity building for new contact
Initiative program parameters	Outline what is outside of bounds
Trust	Clearly defined roles, responsibilities and processes for participation and communication
Communications/language of meeting objectives	Review as a group terminology for collaborative members and use consistently

Identifying Collaborative Members



Collaborative Characteristics



Mission Alignment



Local Presence



Capacity



Collaborative Approach



References

SoCalREN Collaborative Members



- Centrally convenient for in-person meetings
- Group process is more manageable; people will speak up more in smaller groups
- Fewer counties means each can have at least one initiative program

EJ Areas of the Focus Counties

Los Angeles County (Eastern)	San Bernardino County	Ventura County	Kern County
<p>Population Centers</p> <ul style="list-style-type: none"> • East Los Angeles • Pomona • Lancaster 	<p>Population Centers</p> <ul style="list-style-type: none"> • San Bernardino • Ontario • Victorville 	<p>Population Centers</p> <ul style="list-style-type: none"> • Oxnard • Simi Valley • Fillmore 	<p>Population Centers</p> <ul style="list-style-type: none"> • Bakersfield • Delano • Tehachapi
<p>Areas for Environmental Justice</p> <ul style="list-style-type: none"> • Air pollution • Asthma • Surrounding freeways • High-emission industries 	<p>Areas for Environmental Justice</p> <ul style="list-style-type: none"> • Air pollution • Asthma • Food access • High-emission industries/ warehousing • Wildfire smoke 	<p>Areas for Environmental Justice</p> <ul style="list-style-type: none"> • Air pollution/Agricultural processes • Wildfire smoke • Farm workers/ high needs 	<p>Areas for Environmental Justice</p> <ul style="list-style-type: none"> • Air pollution/oil drilling related pollution • High-emission industries/refineries • Wildfire smoke

Source: California Air Resources Board

Selected Members of the Collaborative and Their Mission Focuses

Organization	County Region	Focus Area(s)
Central California Asthma Collaborative (CCAC)	Kern	Public health, environmental justice
Community Action Partnership - Kern (CAPK)	Kern	Poverty alleviation, community service
Active San Gabriel Valley (ActiveSGV)	LA	Transportation, public health, environmental justice
Day One (DO)	LA	Public health
Community Health Action Network (CHAN)	San Bernardino	Public health, community engagement
Central Coast Climate Justice Network (CCCJN)	Ventura	Climate advocacy, environmental justice
Climate First - Replacing Oil and Gas (CFROG)	Ventura	Climate advocacy, environmental justice
Ventura County Community Foundation (VCCF)	Ventura	Fundraising and grantmaking

Benefits for CBOs When Joining the Collaborative

- Help to design a process for community-based energy program development
- Vocalize opinions on the types of programs needed to fill energy gaps in their communities
- Recognition and promotion across SoCalREN's wide network of stakeholders
- Reimbursement for time and sharing expertise



Collaborative Member Expectations

- Each organization should **designate one representative** to attend monthly Collaborative meetings
- Attendance of approximately **5 meetings** including pre- and post-meeting preparation as applicable
- Support in **gathering community feedback** through surveys or in-person sessions
- Collaborate to **define clear, measurable goals** through consensus-building and shared decision-making
- **Provide insights and expertise** to guide decision-making and strategy
- Uphold **cultural competence and inclusivity**

Ensuring CBO Participation

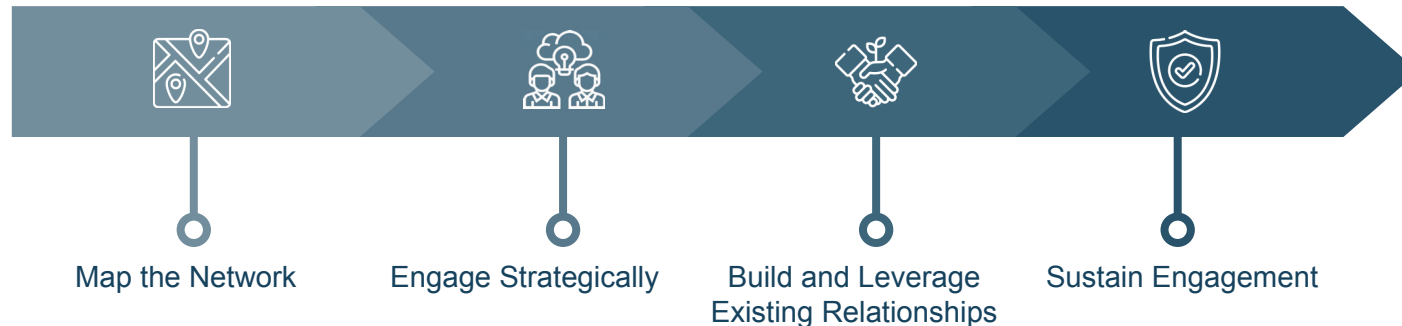
Meeting Stipend (NTE \$10,000)

- \$2,000 per meeting (in-person or virtual)
- Covers:
 - Pre- & post-meeting coordination
 - Meeting participation
 - Travel & meal expenses
- Paid after verified attendance

Additional/Optional Compensation

- Additional one-time payment of \$2,000
- For contributions beyond meetings, such as:
 - Regional outreach to other CBOs
 - Collecting survey data
 - Supporting tasks outside regular meetings/material review

Recommendations for Future Collaboratives



Challenges and Solutions

- Low Response Rate → Leveraged administrator's credibility to secure engagement and built upon existing relationships
- Trust Barriers → Built confidence through transparent goals, clear process, and defined outcomes
- CBO Engagement → Secured participation by offering fair compensation

Collaborative Meetings



Meeting Schedule

Meeting 1	Alignment on goals, review energy fundamentals; discuss how to educate/inform broader community about opportunity	<i>January 2025 Virtual</i>
Meeting 2	Discuss and determine budgets for programs; range/types of programs	<i>February 2025 In-person</i>
Meeting 3	Establish evaluation process for program proposals, metrics and accountability; consider community education workshops and office hours on EE to prepare CBOs; discuss and ensure adherence to ESJ Action Plan	<i>March 2025, Virtual</i>
Meeting 4	Finalize program solicitations, with application and selection criteria established; finalize outreach plan to CBOs	<i>April 2025, Virtual</i>
Meeting 5	Review and select solicitations (sent out in June, 2025); ensure supports in place to mentor program leads	<i>June 2025 In-person</i>
<i>Tier 2 Advice Letter submitted September 30, 2025</i>		

Goals of Collaborative Meetings

Meeting 1

Align goals & review energy fundamentals; plan community outreach

Meeting 2

Discuss program types and budget parameters

Meeting 3

Discuss priority program scope and impacts

Meeting 4

Draft and agree on program design criteria

Meeting 5

Support program proposals and next steps for implementation

Collaborative Meeting 1

Goal:

Build shared understanding of energy efficiency basics, foster community connections, and align on the purpose and intent of the Collaborative.

Discussion Topics

- Welcome and introductions
- Community building
- Purpose & goals of the collaborative
- *Energy efficiency 101* overview
- Identifying barriers and strategies

Meeting Materials

- Pre-Meeting Energy Survey
- Energy Fundamentals & Learning Resources
- ESJ (Equity & Social Justice) Action Plan

Barriers & Strategies

- Energy efficiency content retention

Goals of Collaborative Meetings

Meeting 1

Align goals & review energy fundamentals; plan community outreach

Meeting 2

Discuss program types and budget parameters

Meeting 3

Discuss priority program scope and impacts

Meeting 4

Draft and agree on program design criteria

Meeting 5

Support program proposals and next steps for implementation

Collaborative Meeting 2

Goal:

Identify community energy gaps and explore program models to inform initiative design.

Discussion Topics

- Energy gaps & needs in member communities
- Program parameters
- Types and examples of energy programs
- Program funding details

Meeting Materials

- Case examples of existing energy programs

Barriers & Strategies

- Program idea development

Goals of Collaborative Meetings

Meeting 1

Align goals & review energy fundamentals; plan community outreach

Meeting 2

Discuss program types and budget parameters

Meeting 3

Discuss priority program scope and impacts

Meeting 4

Draft and agree on program design criteria

Meeting 5

Support program proposals and next steps for implementation

Collaborative Meeting 3

Goal:

Evaluation of initiative program proposals.

Discussion Topics

- Why and how we measure program impact
- Examples of KPIs and commonly used metrics
- Other types of evaluation criteria
- Programs with energy savings

Meeting Materials

- Optional reading: resource & non-resource programs

Barriers & Strategies

- Technical content

Outcome: Top Shared Program Priorities and Success Measures



Accessible Program Services

- In-language materials
- Broadened outreach through websites and technology
- Increased participation
- Targeted social media campaigns
- Willingness-to-participate surveys
- 1:1 outreach
- Use of trusted messengers
- Protections for confidentiality



Equitable Benefits

- Participation across income types, property ownership types (renters or owners), and small businesses;
- Zip code or census data tracking
- Ease of enrollment
- Alignment with stackable incentives
- Reasonable program timelines



Youth Engagement and Workforce Development

- Career pathway awareness
- Integration into school curriculum
- Multigenerational engagement
- Measurable behavior change
- Awareness of green careers
- Participation in student-focused conferences
- Workforce, education & training efforts targeting a broad age range



Intentional Outreach

- Presence of program liaisons to help participants navigate offerings
- Clarity in targeted populations
- Participant understanding and ability to access multiple services



Bill Savings

- Verified energy savings through survey and bill tracking
- Enhanced understanding of utility bills
- Embedded tracking mechanisms

Outcome: Shared Program Priorities and Success Measures



Reduced Energy Use During Peak Times

- Participation in demand response programs
- Post-study surveys to assess behavior change
- Analysis of usage data



Energy Efficient Appliances

- Community education on electric appliances
- Increased understanding of technology and savings potential
- Validation that appliances are functioning as intended



Facilitation of Weatherization

- Completion of home/building audits with actionable recommendations on building envelope and efficiency measures



Community Knowledge and Comfort with Electrification

- Community participation in events, workshops, and co-learning activities.
- Post-program outreach and follow-up.
- Presence of community advocates



Streamlined Installation and Permitting Processes

- Progress toward local policy shifts that improve permitting timelines and ease of installation.



Creativity and Innovation

- Exploration of compensation models; stakeholder engagement to uncover emerging or unmet community needs.

Goals of Collaborative Meetings

Meeting 1

Align goals & review energy fundamentals; plan community outreach

Meeting 2

Discuss program types and budget parameters

Meeting 3

Discuss priority program scope and impacts

Meeting 4

Draft and agree on program design criteria

Meeting 5

Support program proposals and next steps for implementation

Collaborative Meeting 4

Goal:

Prepare strategy to solicit program ideas from the broader community.

Discussion Topics

- Interest and opportunity to support outreach to additional CBOs
- Strategies for outreach
- Finalizing program application

Meeting Materials

- Draft program application

Barriers & Strategies

- Materials for CBO outreach
- Expedited timeline for feedback

Goals of Collaborative Meetings

Meeting 1

Align goals & review energy fundamentals; plan community outreach

Meeting 2

Discuss program types and budget parameters

Meeting 3

Discuss priority program scope and impacts

Meeting 4

Draft and agree on program design criteria

Meeting 5

Support program proposals and next steps for implementation

Collaborative Meeting 5

Goal:

Review development of program initiative ideas.

Discussion Topics

- Initiative design
- Evaluation criteria

Meeting Materials

- Initiative application

Barriers & Strategies

- Allowable program types and quantity that can be funded

Recommendations

- Planning logistics for in-person meetings
- Virtual engagement tools
- Review sections within agendas
- Provide easily accessible materials
- Offer additional opportunities for discussion/feedback

Program/Initiative Design



Initiative Application Process

Application requirements

- Activities, goals, and barriers addressed
- Geographic area and target customers
- Organization experience implementing programs
- Proposed methodology for tracking impacts
- Budget breakdown

Facilitators offered feedback to strengthen applications and worked to reduce administrative barriers in the process.

Recommended Criteria for Selecting Initiatives

Alignment with Energy and Equity Outcomes

- Proposals may be designed to achieve equity goals, energy efficiency goals, or a combination of both.
- Inquiring about but not requiring energy efficiency goals allows for innovative approaches to meet community needs.

Demonstrating Community Leadership and Co-Design

- Initiative proposals should provide evidence of stakeholder involvement.
- Should include outreach methods, populations reached, and how received feedback informed design.

Organizational eligibility

- Community-based organizations (collaborative member or non-member) that are located in target service area and demonstrate a commitment to mission-aligned equity-focused work.
- Experience implementing community based programs or strong community-based trust and networks.
- Ability to reliably track metrics.

Oversight and Evaluation of Program Implementation

Program Reporting Process

Facilitator Reporting:

- **Monthly Reports & Invoicing:** Facilitator submitted monthly progress reports and invoices to LA County.
- **Weekly Alignment Meetings:** Ensured goals, deliverables, and methods stay on track.

Collaborative Member Reporting:

- Monthly report template for admin, marketing, and implementation activities.
- Table of metrics + narrative + photos.
- Ongoing support available from implementation facilitator.

Data Collection for Funded Programs

Required **tracking of proposal metrics** (e.g., individuals reached, projects completed, funds spent).

Encouraged use of existing tools (Excel, CRM, etc.) for data collection.

Monthly reporting includes both quantitative tables and qualitative narratives.

Support provided to ensure accuracy and consistency in reporting.



Outcome: Prospective SoCalREN Community-Based Initiatives

- Initiatives represent all regions represented in the collaborative
- 5 proposals were submitted in total
- 7 out of 8 collaborative members submitted initiative proposals
 - 4 opted to partner to serve their shared regions
- Initiatives were developed from meeting content and lots of dedicated 1:1 support
- If approved and funded, our first cohort of collaborative partners would make powerful program champions across much of SoCalREN's hardest to reach regions

Geographic Reach of CBDC Proposed Initiatives



Implementation of Initiatives and Next Steps



The Future of the SoCalREN Collaborative



Support Existing Members

- Funded initiatives from 1st Collaborative to be implemented & supported by program implementers

Launch New Collaborative Cohorts

- Expand to new communities using the existing framework
- Focus on equitable participation and community-based design
- Apply successful practices from the first cohort

Institutionalize the Framework

- Use the Collaborative model for future projects with similar or new goals
- Continue honoraria during active participation
- Funded initiatives become the primary compensation post-collaborative

Key Recommendations for PAs

- **Center equity from the start.** Prioritize CBOs in underserved communities and provide milestone-based stipends to reduce participation barriers.
- **Support capacity building.** Offer technical assistance, energy education & 1:1 coaching and facilitate peer learning & mentorship among CBOs.
- **Streamline proposal & funding processes** Use a simple, accessible proposal process and allow both Collaborative and non-member CBOs to apply.
- **Follow a flexible 18-month timeline.** Balance momentum with meaningful engagement & outreach and adjust based on regional/community needs.
- **Measure what matters.** Focus on accessible services, equitable benefits & workforce development and track progress with CBO-friendly reporting tools.
- **Scale what works.** Replicate the Collaborative model in new regions and use RENs as lead administrators with CCAs and utilities as support.

Toolkit & Resource Library

- Initial CBO outreach sample resources
 - Slide decks
 - Meeting agendas
- Collaborative meeting resources
 - Slidedeck content
 - Activity examples
- Outreach surveys and informational flyers
- Template initiative proposal tool
- Comprehensive advice letter to the CPUC

Next Steps: Initiatives Advice Letter

- Second CPUC Advice Letter for proposed initiatives



Collaborative meeting 5 in Santa Clarita

Thank you!

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