**CAEECC Community Engagement Panel Meeting Summary**

Date: Wednesday April 9, 2025

Time: 1:30pm - 3:00pm PT

On April 9, 2025, the California Energy Efficiency Coordinating Committee moderated a Community Engagement Panel to support development of Portfolio Administrator Mid-Cycle Advice Letters. The meeting was hosted online via Zoom. There were 67 attendees (see Appendix A for a full list of meeting attendees). The facilitation team included Michelle Vigen Ralston (Ralston), Mahal Miles (Miles) and Suhaila Sikand (Sikand) of Common Spark Consulting, and Susan Rivo (Rivo) of Raab Associates. Presenters included panelists Julia Hatton (Hatton) of [Rising Sun Center for Opportunity](https://risingsunopp.org/), Brooke Wright (Wright) of [Environmental Innovations](https://environmentalin.com/), and Sarah Sharpe (Sharpe) of [Central California Asthma Collaborative](https://cencalasthma.org/).

Supporting meeting materials are available at: <https://www.caeecc.org/4-9-25-ee-community-engagementpanel>. Relevant materials include the Agenda and Slide Deck.

# **Overview**

Key themes from reflection breakout sessions included

* Relationship-building with customers and trusted community organizations is crucial
* Programs should be more accessible
* Indicators should account for the different types of community engagement

High-Level Summary of Next Steps:

* PAs are anticipated to reflect upon the Community Engagement Panel to inform the development of Community Engagement Indicators that they will submit in September 2025.
* PAs will participate in an externally facilitated process by BluePoint Planning to support coordination on developing the Community Engagement Indicators, as encouraged by [D.23-06-055](https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M512/K907/512907396.PDF). By close of business April 23rd, email any written feedback to nbarba@frontierenergy.com for forwarding to PA coordinators.

*This meeting summary is intended to capture the overarching discussion of ideas, concerns, alternative options for proposals and consensus; it is a high-level summary and not a transcript. For more detailed discussion, please reach out to the* *Facilitation Team**.*

Key acronyms used in this document include California Energy Efficiency Coordinating Committee (CAEECC), California Public Utilities Commission (CPUC), California Energy Commission (CEC), California Air Resources Board (CARB), energy efficiency (EE), working group (WG), disadvantaged communities (DAC) and hard-to-reach (HTR) communities, justice equity diversity and inclusion (JEDI), CPUC’s Environmental and Social Justice Action Plan (ESJ Action Plan), Portfolio Administrator (PA), Investor-owned utilities (IOU), Regional Energy Network (REN), community-based organization (CBO), Equity Metrics Working Group (EMWG), Market Support Metrics Working Group (MSMWG), evaluation measurement and verification (EM&V), Disadvantaged Communities Advisory Group (DACAG), Low-Income Oversight Board (LIOB), Evolving CAEECC Working Group (ECWG), Portfolio Administrators (PAs), and Mid-Cycle Advice Letters (MCALs).

# **Welcome and Background**

*Slides 2 - 15*

Ralston shared the panel agenda, introduced panelists, and provided an overview on the purpose of the panel.

The three CAEECC Community Engagement Panel panelists:

* Julia Hatton, President & CEO of [Rising Sun Center for Opportunity](https://risingsunopp.org/)
* Brooke Wright, Vice President of [Environmental Innovations](https://environmentalin.com/)
* Sarah Sharpe, Deputy Executive Director of [Central California Asthma Collaborative](https://cencalasthma.org/)

# **Panelist Presentations**

*Slides 16 - 34*

## **Julia Hatton, President & CEO of Rising Sun Center for Opportunity** *Slides 17 - 25*

Julia Hatton introduced Rising Sun Center for Opportunity’s work to build career pathways for economic equity and climate resilience, which includes union pre-apprenticeships for construction trades, policy advocacy to ensure green jobs are good jobs, employing youth in the clean economy, and delivering residential energy and water savings. Hatton overviewed some of Rising Sun Center for Opportunity’s programs, including the provision of the [Climate Careers](https://risingsunopp.org/programs/climate-careers/) and [Green House Calls](https://risingsunopp.org/programs/ghc/).

Hatton also shared recommendations on community outreach, encouraging attendees to invest in outreach and remove barriers to program participation. Recommendations included partnering with trusted community-based organizations, providing different benefits for different audiences, and offering funding for time and people. Barriers to community program participation included landlord permissions, eligibility requirements, and monolingual services and collateral.

## **Brooke Wright, Environmental Innovations** *Slide 26*

Brooke Wright’s perspective on community engagement is centered in how Environmental Innovations interacts with business communities and partners in implementation. Environmental Innovations administers the [California Green Business Network](https://greenbusinessca.org/?gad_source=1&gclid=CjwKCAjwtdi_BhACEiwA97y8BMt8uWBy8fozqZzSLRgTs5HAZcvwD_GA8q67cLF3Wg9LkUhrYNePMBoCT9sQAvD_BwE), a network offering free sustainability resources and recognition to businesses.

In past experiences, Wright found that some businesses who were eligible for energy efficiency were not getting served because the businesses’ energy efficiency requests were too small to meet program criteria. Wright emphasized the importance of honoring the trust-building efforts of community-based organizations. Wright also recommends adjusting and even narrowing program eligibility criteria to target businesses who were left out of past opportunities. Wright recommends creating funding streams for community-based organizations and local governments to support outreach.

Further, Wright noted that some community-based organizations are starting to be seen as a sales arm of program outreach, which is not the role of a community-based organization; being perceived as sales representatives breaches the trust that community-based organizations have built within their communities.

## **Sarah Sharpe, Central California Asthma Collaborative** *Slides 27 - 34*

Sarah Sharpe offered an overview of Central California Asthma Collaborative’s (CCAC) work, whose mission includes advancing health equity and environmental justice by empowering Central California communities through services, research, advocacy, and data-driven solutions to reduce the burden of asthma. Among many initiatives, CCAC supports building decarbonization, electric vehicle equity, and [Comprehensive Asthma Remediation & Education Services (CARES)](https://cencalasthma.org/cares/).

Sharpe noted the need for many community engagement “tools” in the “toolbox”, recommending a variety of contact engagement methods to reach target communities. Sharpe shared the importance of meeting people where they are at, such as existing adhering places like schools, churches, and community events. Sharpe also highlighted the current atmosphere affecting community engagement modality–some folks, given the current federal landscape, do not feel comfortable attending in-person events or responding to canvassing. Sharpe shared that this discomfort makes offering many options and ways of community engagement with trusted community partners even more important.

# **Discussion on Panelist Presentations**

* Wright elaborated that current program eligibility criteria may be narrow in a way that is exclusive to businesses that have already been left out of energy efficiency program opportunities in the past. Wright noted that some businesses most in need of upgrades—like replacing outdated lighting—aren’t being reached by current programs, partly because these improvements are often more costly. Wright stated that some businesses have enrolled in programs but do not end up being served. This “conversion rate”, of eligible businesses enrolling but not receiving what they applied for, weakens community trust. Wright emphasized the importance of building trust in the community, such as ensuring that program applicants receive what they see advertised by the programs.
* SoCalREN asked panelists to discuss not only community engagement, but also program design; specifically, how panelists ensure programs are effective through thoughtful design and ongoing evaluation. Sharpe explained that some CCAC research endeavors create community advisory boards to involve members from the very beginning of research processes. These advisory boards provide input on everything from the study's initial design and sampling plan to messaging and final evaluation. By staying involved throughout, members can help shape the research from start to finish. Sharpe also emphasized the importance of compensating community members for their time and contributions, noting that their involvement is valuable and should be fairly reimbursed. Hatton shared that program design involves surveys and focus groups with program trainees. Hatton also mentioned that former program participants and trainees on staff are on Rising Sun Center for Opportunity’s board of directors, which is a good way to receive more input on program design. Lastly, Hatton noted that Green House Call customers receive prestamped postcards to provide program feedback; program efficacy is also measured by energy and water savings achieved.
* Hatton shared that Rising Sun Center for Opportunity offers a stipend to trainees in construction pre-apprenticeship programs. Additionally, youth employees are compensated at $19/hour. Recipients of Green House Calls receive services for free.
* A Member of Energy Division questioned how organizations measure diversity and or change in diversity. Wright spoke to the necessity and challenges of diversity considerations, such as roadblocks to diversity of installers. Wright elaborated that some installers would be eligible to implement programs, but meet red tape, insurance requirements, technological barriers, and other bureaucracy. Hatton shared that Rising Sun Center for Opportunity collects demographic data of program participants and trainees. Further, Rising Sun Center for Opportunity [advocates to ensure green jobs are good jobs](http://www.risingsunopp.org/policy); they also support contractors in meeting [High Road Workforce Standards](https://laborcenter.berkeley.edu/wp-content/uploads/2023/09/Californias-Climate-Investments-and-High-Road-Workforce-Standards.pdf). Sharpe also shared challenges that CCAC faces, including difficulty partnering with organizations to install [Energy Savings Assistance](https://www.cpuc.ca.gov/consumer-support/financial-assistance-savings-and-discounts/energy-savings-assistance) measures for community members. Sharpe shared that the interventions (hood replacements) that the community needed were too small for contractors to financially justify installations. Sharpe reiterated the importance of tracking demographic data, mentioning programs such as [Supplier Diversity,](https://thesupplierclearinghouse.com/) and also noted the importance of geographic diversity to CCAC. Sharpe shared that she advocates for diversity in CCAC’s climate work, especially relating to the just transition for the workforce.

# **Reflection Breakout Sessions**

*Slides 36 - 38*

Meeting participants were randomly divided into five virtual breakout rooms to discuss reflections on the panelist presentations. Participants were prompted with two questions for reflection:

* Based on the presentations, what should PAs consider, highlight, include, or avoid in their community engagement indicators?
* Based on the presentations and what panelists shared they value most in community engagement, what indicators are most important? Which of these are reasonable for PAs to recommend?

Meeting participants reconvened for a high-level shareout synthesis of themes (listed below) from their discussions by the Facilitation Team (*see* [*Appendix B*](#_z337ya) *for detailed notes from each of the breakout sessions*).

**Themes from Reflection Breakout Session Discussion**

* Relationship-building is crucial
	+ It is important to show up as human
	+ Relationship-building creates trust, which can lead to long-term collaboration
	+ Trust takes time to build
	+ Relationships are a two-way street; a reciprocal relationship
* Programs should be more accessible
	+ Long-term communication; having multiple touch points with customers
	+ Making sure that we are not putting up barriers
	+ Ensure that we are not making it hard to have program access
	+ Balance in requirements and need for broad/diverse participation
	+ Customers don’t want to jump through hoops to receive a rebate
* Indicators should account for type of community engagement
	+ Indicator that shows impact most important- results based
	+ Survey to measure trust, learning - or how else?
	+ Community benefit agreements are flexible, can be applied at program level
	+ Quantitative, qualitative
		- What type of outreach event? House visit, focus group, flyer, booth
		- May not fully show the impacts of community engagement
	+ Identify specific indicators for the type of community engagement at each phase - program design, program uptake/participation, program evaluation, program benefit

# **Wrap-up**

*Slides 39 - 41*

## **Next Steps & Reminders**

Ralston reminded attendees that PAs are anticipated to reflect upon the Community Engagement Panel to inform the Community Engagement Indicators that they will submit in September 2025 as part of [D.23-06-055](https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M512/K907/512907396.PDF).

Miles noted that the Quarter 2 Full CAEECC Quarterly Meeting #46 is scheduled for May 8, 2025.

Ralston concluded the panel with a note of gratitude for the panelists and attendees.

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# **Appendix A: Attendees**

| **Organization** | **Name** |
| --- | --- |
| **CAEECC Members**  |  |
| 3C-REN | Jordan Garbayo |
| BayREN | Jane Elias |
| Frontier Energy | Nancy Barba |
| IREN-WRCOG | Benjamin Druyon |
| LGSEC | Amaury Berteaud |
| Marin Clean Energy | Jenn Green |
| PG&E | Lisa Hunter |
| RCEA/NREN | Stephen Kullmann |
| SBUA | Ted Howard |
| SCE | Jessica Lau |
| SDG&E | DeDe Henry |
| SDREN | Desiree Daugherty |
| SF Department of the Environment | Benny Zank |
| SoCalGas | Joshua Torres |
| SoCalREN | Tessa Charnofsky |
| The Energy Coalition | Natalie Espinoza |
| **Ex-Officio**  |  |
| CPUC | Ely Jacobsohn |
| CPUC | Valerie Kao |
| CPUC | Pam Rittelmeyer |
| CPUC | Coby Rudolph |
| CPUC | Gillian Weaver |
| **Other Interested Stakeholders** |  |
|  3C-REN |  Sara Huskey |
|  ALaBonte (ALBA) |  Alison LaBonte |
|  Ambag |  Giselle Wendt |
|  Blue Point Planning |  Bianca Hutner |
|  Blue Point Planning |  Katie McCabe |
|  Brandt Energy Strategies |  Melissa Brandt |
|  C4GS-ZEDlife |  Adria Fox |
|  Cal-MTA |  Rachel Good |
|  Central California Asthma Collaborative |  Sarah Sharpe |
| Chevron | Laura Verduzco |
| DAC | Don Arambula |
| Environmental Innovations | Brooke Wright |
| Franklin Energy | Brett Bishop  |
| Franklin Energy | Jonathan Budner |
| Franklin Energy | Emily Carter |
| Franklin Energy | Penelope Gabor |
| Franklin Energy | Justin Kjeldsen |
| Franklin Energy | Margaret Marchant |
| High Sierra Energy Foundation | Pam Bold |
| ICF | Shelley Osborn |
| Jay Luboff Consulting | Jay Luboff |
| Marin Clean Energy | Michael Denevan  |
| Marin Clean Energy | Michelle Nochisaki  |
| Marin Clean Energy | Wade Stano |
| Orange County Power Authority | Nataly Morales Sandoval |
| Orange County Power Authority | Pranesh Venugopal |
| PACE | Susana Apeles  |
| PACE | Leslie Diaz  |
| PG&E | Sebastien Csapo  |
| PG&E | Antoinette Siguenza |
| PG&E | Lindsey Tillisch |
| Resource Innovations | Vivek Joshi |
| Resource Innovations | Melanie Stutler |
| Rising Sun Opportunities | Julia Hatton |
| SCE | Scott Higa |
| SCE | Christopher Malotte  |
| SCE | Debra Weberg  |
| SDGE | Jen Palumbo |
| Sempra Energy | Paulo Morais |
| SFDPH | Rachel Blythe  |
| Sierra Energy Reimagined | Jan Maes |
| SoCalGas | M. Farid |
| SoCalGas | Alex Fonseca |
| The Energy Coalition | Rebecca Hausheer |
| TRC | Marissa Van Sant |
| USC Credit Union Clean Energy Lending | Jose Orozco Pelico |
| Willdan | Rosie Kang  |

# **Appendix B: Notes from the Reflection Breakout Sessions**

The Facilitation Team organized three breakout rooms to encourage attendee reflections on panelist presentations. Breakout room participants made notes of their discussions in an interactive [CAEECC Community Engagement Panel Breakout Room Slides](https://docs.google.com/presentation/d/1BQE7aYJ6-2Jd1u4rMQW9pHYkCAaZvvJud_jsA-VGMto/edit?slide=id.g340acd7d8eb_0_729#slide=id.g340acd7d8eb_0_729) slide deck.

**Prompts for Breakout Discussion**

 The breakout room discussions addressed the following questions:

1. Based on the presentations, what should PAs consider, highlight, include, or avoid in their community engagement indicators?
2. Based on the presentations and what they value most in community engagement, what indicators are most important? Which of these are reasonable for PAs to recommend?

## **Breakout Room #1 Notes**

* CCRREN - Community Engagement is top of mind. Collaborative spirit. Advisory committees
* Appreciated Brooke’s time to be human. #1 thing in community relationship building. Show up as you.
* Trust building takes time! Being at community events with a table
* Layers end up being a risk → hard for folks on the ground to control the outcomes.
* Simplifying messages. How is it relevant to the people? Don’t overcomplicate
* Eligibility criteria. Rising Sun doesn’t have any. Have folks played with eligibility + outreach?
* BayREN tried to target moderate income but didn’t have the eligibility criteria. Worked through partners (CBOs). Hit the target, but not to goal. Now putting in eligibility criteria to ensure target audience can be quantified
* If you’re working with larger regional CBO, then likely not hitting your targets. People on the ground in that community will be your best resource. It might take longer, but will be better able to help you serve
* BayREN is working with CBOs that are more focused within a given community
* Income criteria - how are you approaching? Cognizant not crossing over into ESA (energy savings assistance program).
* Offering some basic remediation to get basic energy efficiency and weatherization work done
* Not targeting communities can be counterproductive. If you’re not picking customers with high usage already, you could raise their bills. Be aware of this and other characteristics
* Real value of being on the ground, consistent, and persistent
* What indicators are important?

## **Breakout Room #2 Notes**

* Community benefit agreements - what are these? They have value, are flexible, can be applied at program level. Example: for WE&T, you can focus on type of worker, wage, standards, etc. Check with Ava Community Energy about their use of CBAs.
* More on CBAs: <https://www.policylink.org/resources-tools/tools/all-in-cities/good-jobs/community-benefits-agreements#:~:text=A%20CBA%20is%20a%20legally,if%20the%20project%20moves%20forward>
* <http://staging.community-wealth.org/sites/clone.community-wealth.org/files/downloads/article-beach.pdf>
* Observation that RENs may be better equipped to support community engagement due to fewer cost-effectiveness constraints
* ID specific indicators for the TYPE of community engagement at each phase - program design, program uptake/participation, program evaluation, program benefit

## **Breakout Room #3 Notes**

* Question A:
	+ Engage with the proper groups in order to have diverse participation, to have diversity of outreach providers, enables a diverse set of recipients to program information
	+ Include how they intend to work with CBOs to get a diversity of participants
	+ There isn’t a one size fits all, we need to meet communities where they are
	+ Making sure that we are not putting up barriers, ensure that we are not making it hard to have program access
	+ PACE has diversity in people served in their existing programs, decreasing barriers to program qualification
	+ Striking a balance in requirements and need for broad/diverse participation
	+ Follow up with surveys, to see what is working
* Question B:
	+ Both the qualitative and quantitative would be important to include
	+ For E&MS programs - qualitative/quantitative may not fully show the impacts of community engagement
	+ As far as providing energy assistance, they collect data, numbers on those interested in participating, they do a weekly summary, who is completing applications, reports on outreach: events, etc., sign in sheets from events, data helps gauge the effectiveness of community engagement
	+ Having multiple touch points with customers

## **Breakout Room #4 Notes**

* Focus group with CBOs in SoCalREN
* Lead Conversion is important
* Follow up on services provided, participant satisfaction is important- longterm communication from beginning to end
* Nearby hard-to-reach or DAC, flexibility in eligibility i.e. CalEnviroscreen uses 2010 census tracts
* Measuring allocation of budget to community engagement (how to measure investment)
* Urban vs. Rural cost to reach hard-to-reach household (resource intensive to reach single person in rural)
* Length of continual engagement with individuals over time
* Quantitative, Qualitative (what type of outreach event? House visit, focus group, flyer, booth)
* Target population for event, host of event, topic
* Indicator that shows impact most important- results based
* Survey to measure trust, learning - or how else?

## **Breakout Room #5 Notes**

* Conversion rate - very important, doing homework ahead of time for participants and how to properly address them
* Credibility in community
* Language - care to not be extractive, not a sale but hopefully a reciprocal relationship
* A relationship is a two-way street
* Maybe an indicator that highlights the count of CBOs or community partners engaged or partnered with to support outreach. Maybe how that translates into actual engagements or enrollments. Frequency and quality of engagements.
* Important to be careful with # CBOs. One CBO may have many successful events, but another region needs 4-5 CBOs to get that same engagement. Hard to get data on what was the quality of that engagement, whether 100% engaged, or no they didn’t. Many did not end up getting service which is ultimate data point. Not much in between there
* Big thing with these customers is they don’t even know their service provider. From there, SMB are chickens with heads cut off, big challenge getting to point with provider, services have, discount available, another thing is many don’t want to jump thru hoops to get rebate.
* Notes on whether outreach connected with a decision maker would be helpful.
* B. really indicators that you’ve really talked with the decision maker or owners is one critical one. Indicators, to what extent engaged. Any finer points? One of the speakers mentioned meeting customer participant where they are. Identify decision maker, maybe, but are you communicating past that
* Credibility, showing that you’ve done homework in first place before going by, there to listen, not just give spiel on sales pitch,
* Think language: not be extractive when working with community members. Not so much a sale, reciprocal relationship looking to retain for some time
* Partner with CBOs instead of just being a random consultant, think a good indicator would be to track demographic data, primary language
* “I’m here to learn” not here to preach or tell you