Mid-Pilot Evaluation Report for the Compensation Pilot

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Note: At the time this document was finalized, the Evolving CAEECC Working Group was undergoing a shift from doing work in meetings and huddles as a group, to individual or individually-driven collaborations to put reflections in writing for CAEECC and CPUC. Compensation will continue to be provided for the remainder of the Working Group process, but this mid-point report does not include updates to reflect this shift. They will be reflected in the Compensation Pilot Final Report.

Executive Summary

This document summarizes a mid-course evaluation report for the Compensation Pilot ("Pilot") supporting a sub-group of the [California Energy Efficiency Coordinating Committee](#) (CAEECC) called the [Evolving CAEECC Working Group](#).

The Compensation Pilot was developed to address known barriers preventing community-based organizations (CBOs) and smaller groups from participating in CAEECC activities: the time-intensive nature of CAEECC involvement and a lack of staffing resources. While these are by no means the full list of barriers, a pilot to provide financial compensation to interested stakeholders who represent a financial need should at least mitigate that specific barrier to participation and support greater inclusion of historically underrepresented groups in CAEECC conversations and deliberations.

This report is organized into the following sections:

1. [Section I](#): a methodology for the Mid-Pilot Evaluation Report.
2. [Section II](#): an overview and background of the Compensation Pilot through the Application process.
3. [Section III](#): a presentation and analysis of evaluation criteria from the Compensation Task Force Final Report.
4. [Section IV](#): a presentation and analysis of data regarding the Grantee experience.
5. [Section V](#): a presentation and analysis of data regarding the Administrator experience.

6. [Section VI](#): a conclusion.
7. [Section VII](#): a series of appendices with more information.

The general result across this Mid-Pilot Evaluation is that the Compensation Pilot is certainly supporting engagement by historically underrepresented perspectives, is contributing to a broader diversity of voices in the Evolving CAEECC Working Group, and has provided several important lessons for future compensation programs.

Summary of Lessons Learned

The Pilot Administrators offer the following lessons for future funding endeavors within CAEECC and externally to state agency granting opportunities. Details are included in the Lessons Learned portion at the end of each data-analysis section.

Recruitment and Application Process

- Recruitment takes time and recruitment by volunteers, while immensely appreciated, can make the process slower and harder to evaluate.

- Establish clear criteria for review of applications and the total number of Grantees the Pilot can support prior to inviting Review Committee members.

Mid-Point Evaluation

- Although the Pilot Administrators compiled an outline of this report and Pilot Survey questions between recruitment and the launch of the Working Group/Pilot, more planning is needed to fully capture all the data points for this evaluation.

- If requiring the completion of Evaluation and/or Pilot Surveys by Grantees, funding to cover evaluation and surveys is necessary. Moreover, if the Evaluation Surveys are not required by all, comparison of data is skewed.

- If evaluation of data from applications is needed, require all participants to fill out the application, or expect to conduct individual outreach to fill data gaps.

Grantee Experience

- The ways in which the Pilot was set-up factor the outcomes. In particular, the lived/living experiences of those who created the Pilot influence the assumptions of the Pilot, and therefore, may mismatch the experience of Grantees.

- Ultimately, the benefit of the opportunity for funding cannot be understated.

- More funding is needed to properly support historically underrepresented voices in a "new" space.

Administration

- To provide flexibility, in the name of inclusion, a compensation program needs to anticipate rebalancing its budget to accommodate the shifting needs of Grantees and the working group process.

- Development of a "simple" system to invoice takes time. Instead, consider utilizing pre-made tools to streamline the invoicing process.

- Consider automatically distributing funds for participation in Meetings where attendance is known. Separately, allow for invoicing of other time and expenses with supported documentation.

- A Handbook and Walkthrough are necessary to enable proper use of funds and comprehension of the process. However, more attention to guide Grantees may be necessary and should be budgeted.

I. Overview of the Mid-Pilot Evaluation Report

This document summarizes a mid-course evaluation report for the Compensation Pilot ("Pilot") supporting a sub-group of the California Energy Efficiency Coordinating Committee (CAEECC) called the Evolving CAEECC Working Group. This report was developed by the Pilot Administrators (Common Spark Consulting) to understand how the Pilot is meeting its objectives and goals midway through the Evolving CAEECC Working Group process.

Disclaimer: This report was prepared by the Pilot Administrators of the Compensation Pilot, who are also the Facilitators of the Evolving CAEECC Working Group. The Pilot Administrators represent one perspective within the Compensation Pilot experience. The Pilot Administrators plan to invite Grantees to share their experiences in more detail in the Compensation Pilot's Final Report.

Report Methodology

Development of Report

The evaluation structure for the Pilot was developed with input from the Compensation Task Force previously convened by CAEECC. The Compensation Task Force recommended several evaluation criteria to measure the success of the Pilot in its Final Report and listed below.[1]

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[1] When developed, the Criteria cited the "JEDI-focused Working Group". This was renamed to the Evolving CAEECC Working Group and has been updated throughout this document to minimize any confusion.

Evaluation Criteria from the Compensation Task Force Final Report

These criteria, alongside the Principles, Intentions, and Eligibility, will help evaluate the success of the Pilot:

1. Criterion 1: Diversity of perspectives included in Evolving CAEECC WG
    a. Percentage (and absolute #) of Evolving CAEECC WG overall that is/represents new individuals, organizations, and perspectives/expertise to CAEECC
    b. Percentage of Evolving CAEECC WG overall that is/represents a CPUC ESJ Community
    c. Percentage (and absolute #) of members of Evolving CAEECC from a CPUC ESJ Community that is receiving Compensation Pilot funds
    d. Percentage (and absolute #) of members of Evolving CAEECC that is new/represents a new stakeholder that is receiving Compensation Pilot funds
2. Criterion 2: Accessibility and ease of application process
    a. Number of applicants for the Compensation Pilot
    b. Rate of acceptance for Compensation Pilot
3. Criterion 3: Effectiveness of Outreach and Recruitment
    a. Percentage of Compensation Pilot recipients from direct outreach efforts
    b. Number of Compensation Pilot recipients from direct outreach efforts

In addition, the Final Report recommended the collection of additional data to help inform and potentially improve the effectiveness of the Pilot.

- By Pilot participants:
    - How funds were used
    - If any expenses were uncompensated
- Number of declined offers from recruitment and reason why (if available)

The Task Force also discussed two criteria that they strongly recommend not be used to measure the success of the pilot.[2]

- The outcome of the Evolving CAEECC Working Group
- A set of predefined *productive contributions*

In addition to the evaluation criteria recommended by the Compensation Task Force, the Pilot Administrators have added some qualitative evaluation to include experience of

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[2] The Compensation Task Force believed these two criteria are factors that can contribute to the overall outcomes of a Working Group, but that the Pilot itself cannot impact. Secondly, productive contributions may take many forms, especially with members new to CAEECC Working Groups, possibly new to energy efficiency, and members that may engage in more passive or indirect ways as may be supported by their culture, personality, capabilities, or other factors.

Pilot Administrators and Grantees administering/implementing of the Pilot. Evaluation data were collected through a combination of the Working Group applications, evaluation surveys, on-going documentation/journaling, and check-ins between the Pilot Administrators and Grantees.

- The Working Group applications informed the representation of both Working Group Members and Grantees as well as the rate of acceptance.
- The two surveys (survey questions in Appendix) were designed to understand a baseline from the launch of the working group:
  - Pilot Survey #1, issued in the Meeting #1 Evaluation (17 total respondents, 9 of whom were Compensation Pilot Grantees[3], for an 81% response rate) informed findings about the recruitment and application process as well as nuances around the need for compensation.
  - Pilot Survey #2, issued in the Meeting #3 Evaluation (22 total respondents, 9 of whom were Compensation Pilot Grantees, for an 81% response rate) informed findings on the initial impact of the Pilot and ease of participation in the Pilot.
  - *A future Pilot Survey #3 will inform the Compensation Pilot Final Report.*
- The Pilot Administrators kept a journal to document interactions throughout the Working Group Process.
- Occasionally, Pilot Administrators met with Grantees and received feedback on the Pilot.

How the Evaluation Report will be Used

This Mid-Pilot Evaluation Report is intended to inform future funding opportunities in regulatory proceedings and/or CAEECC. For example, two California Public Utilities Commission (CPUC) staff members observed the application review process for the Compensation Pilot to help inform the development of the Equity and Access Grant Program they later launched. It is anticipated that similar and future funding endeavors will refer to this evaluation report as a resource for their development process.

As the Pilot Administrators are also the Working Group Facilitators, the Pilot Administrators have been adapting the process for the Pilot throughout its process in direct response to Grantee experiences. This Mid-Pilot Evaluation Report documents these changes. The Pilot Administrators will continue to modify the Pilot as appropriate, necessary, and feasible within the Pilot guidelines.

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[3] In the survey responses, it was apparent that two Grantees were confused about their status in the Compensation Pilot (whether or not they applied and/or were granted compensation) despite numerous communications about their Compensation Pilot acceptance and delivery of the Compensation Pilot Handbook (a guidance document). The number indicated here is modified to include these two Grantees despite their initial survey responses.

At the close of the Compensation Pilot, the Pilot Administrators will issue a Compensation Pilot Final Report with additional detail and analysis that builds off this report.

II. About the Compensation Pilot

The Compensation Pilot is a first-of-its-kind approach for CAEECC to mitigate a known financial barrier to engagement in the energy efficiency portfolio regulatory proceeding (R.13-11-005) and participation in the CAEECC stakeholder committee.

The Pilot compensates Grantees (accepted Compensation Pilot applicants) for their active participation in the Evolving CAEECC Working Group. The Evolving CAEECC Working Group is tasked with evaluating and reforming the CAEECC to align to the evolving energy efficiency portfolio and justice, diversity, equity, and inclusion, per the Draft Prospectus that was approved by CAEECC on November 30, 2022.

Background and Development of the Pilot

In 2021, the CPUC—through its development and publication of the Environmental and Social Justice (ESJ) Action Plan, and comments generally made by the Commission—motivated CAEECC to broaden the scope of a new task force/working group to propose ways to overcome diversity challenges, and recommend additional ways to create a more diverse, equitable, inclusive, and accessible CAEECC collaborative. As such, the Composition, Diversity, Equity and Inclusion Working Group (CDEI) was formed under CAEECC and convened from January 2021 - April 2022.

The Composition, Diversity, Equity, and Inclusion Working Group recommended the launch of a subsequent Working Group (the Evolving CAEECC Working Group[4]) with much broader representation, to detail recommendations around CAEECC's purpose and processes, including representation. They recommended development of a compensation program to pilot for the Evolving CAEECC Working Group.

Compensation Task Force: The Composition, Diversity, Equity, and Inclusion Working Group recommended that a Compensation Task Force be developed to help implement a compensation program for CAEECC. The Full CAEECC accepted the Composition, Diversity, Equity, and Inclusion Working Group recommendation to approve a Compensation Task Force that would first seek compensation for the Evolving CAEECC Working Group. The Compensation Task Force was formed in the summer of 2022 to explore funding pathways and develop the parameters to a Compensation Pilot. The Compensation Task Force developed a pilot program report, which CAEECC (via

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[4] Originally, the Composition, Diversity, Equity, and Inclusion Working Group named this the "Restructuring CAEECC Working Group". It was then referred to as the JEDI-focused Working Group (Justice, Diversity, Equity, and Inclusion). For clarity, this report refers to the working group as the Evolving CAEECC Working Group.

SoCalREN) submitted to the CPUC via a Motion on behalf of the Compensation Task Force to request the use of $185,000 of unspent Energy Efficiency Budget Funds for the Compensation Pilot to be run within the Evolving CAEECC Working Group. In April 2023, the California Public Utilities Commission (CPUC, "Commission") approved the request.

Administration

The Commission approval of the aforementioned Motion directed funds from SoCalREN to support the Pilot. SoCalREN contracted with Common Spark Consulting, which is part of the CAEECC Facilitation Team, to administer the Pilot. The Compensation Task Force recommended that the "administration and oversight of the Pilot be entrusted to the CAEECC Facilitation Team and Program Administrators." Administration duties (capped at 15% of the overall budget) of the Pilot Administrators include:

- Support the recruitment and application process.
- Document Pilot Grantee eligibility and the amount and distribution of funds to Grantees.
- Conduct an evaluation process through a Mid-Pilot Evaluation Report and a Final Pilot Evaluation Report.

In April 2023, the CAEECC Facilitation Team launched recruitment for the Evolving CAEECC Working Group with the Compensation Pilot application folded within. In June 2023, the Evolving CAEECC Working Group launched with eleven Compensation Pilot Grantees.

Figure 1. Timeline of the Development of the Compensation Pilot

Pre-development			Implementation
01/2022 - 04/2022	06/2022 - 10/2022	12/2022 - 04/2022	04/2023 - 06/2023
Composition, Diversity, Equity, and Inclusion Working Group Develops Recommendations	**Compensation Task Force Develops Recommendations**	**SoCalREN Submits Motion Requesting Funding and CPUC Approves it.**	**Compensation Pilot Application Opens and Pilot Launches**

Recruitment Process

Recruitment for the Compensation Pilot occurred concurrently with recruitment for the Evolving CAEECC Working Group, per the recommendations in the Compensation Task
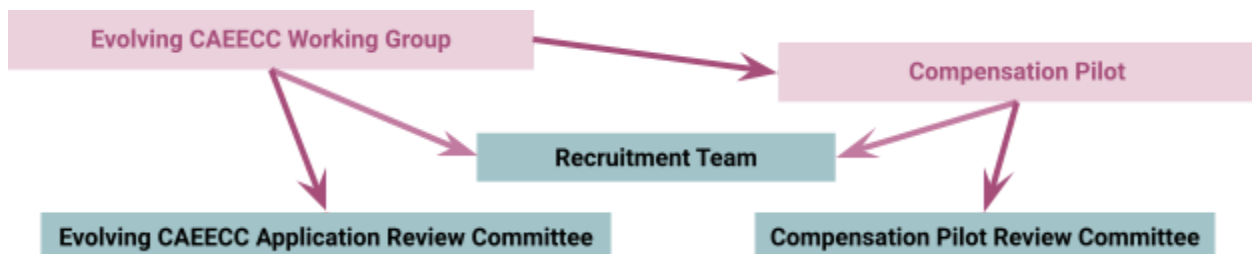
Force's Final Report. A Recruitment Team[5] led outreach and provided information about the Evolving CAEECC Working Group and Compensation Pilot.

Per the Compensation Task Force's Final Report, and with a few additions by the Pilot Administrators, the Recruitment Team was tasked with:

- Identifying organizations and individuals to participate in Evolving CAEECC Working Group based upon previous relationships, involvement, and recommendations from various sources, including past CAEECC working groups (such as the Composition, Diversity, Equity, and Inclusion Working Group and the Compensation Task Force), and other member recommendations.
- Recruiting organizations and individuals directly through email outreach and offering short informational calls for further information.
- Distributing outreach emails to the CAEECC listserv[6] as well as the relevant proceeding listservs.
- Creating and distributing an electronic flyer with key information about the Evolving CAEECC Working Group and the Compensation Pilot.
- Creating a webpage with context, frequently asked questions, and information about the Evolving CAEECC Working Group and Compensation Pilot.

Two separate Review Committees were established: one for the applications to the Evolving CAEECC Working Group and one for the Compensation Pilot (see Figure 2).

Figure 2. Evolving CAEECC Working Group Recruitment and Application Team Relationships

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[5] The team included the Facilitation Team, CAEECC Co-Chairs, CPUC Energy Division Staff, and invited volunteers from the Composition, Diversity, Equity, and Inclusion Working Group. The Recruitment Team also invited volunteers identified by the Compensation Task Force Final Report, which includes members of the Compensation Task Force, CAEECC, and the CPUC Environmental and Social Justice Team. The Recruitment Team included:
- CAEECC's Facilitation Team (Katie Abrams, Michelle Vigen Ralston, Suhaila Sikand, and Susan Rivo)
- CAEECC Co-Chairs (Lara Ettenson, NRDC and Lucy Morris, PG&E)
- CPUC Energy Division Staff (Alison LaBonte and Ely Jacobsohn)
- CAEECC Members (Fabi Lao, CSE and Lujuana Medina, SoCalREN)
- Past CAEECC Working Group Members (Mabell Garcia Paine, Viridis Consulting and Jim Dodenhoff, Silent Running).

[6] The CAEECC listserv is an email list of folks who have engaged with CAEECC before.

Application Process

The Compensation Pilot Application was included as an optional section to the Evolving CAEECC Working Group Application as recommended by the Compensation Task Force. This was intended to reduce confusion, increase simplicity, and increase accessibility to the Pilot.

The Application provided background information on the Compensation Pilot and included two questions (Questions 21 and 22) regarding eligibility (the need for compensation in order to participate). Applicants who did not select "Yes" to Question 21, indicating financial need, were not considered as Compensation Pilot Applicants.

Compensation Pilot Application
Questions 21 - 22 refer to the Compensation Pilot. By answering these questions, you are applying to be a grantee of the Pilot. To apply, please answer <u>both</u> questions. If you would not like to apply, you may skip these two questions.

The CPUC recently approved a Compensation Pilot for this Working Group to address a financial barrier that hinders historically underrepresented groups from participating in the energy efficiency policy-making process.

The [Compensation Pilot](#), folded into this application, is a related yet separate evaluation process.

Compensation will be at the rate of $150/hour. Accepted Pilot recipients will provide an attestation of both their financial need and participation in meeting time, prep, and follow-up, which the facilitation team will verify before reimbursement.

The facilitator/review committee may request additional info to verify applicant eligibility as needed/appropriate.

Question 21: Would participating in the Evolving CAEECC WG without compensation create a financial hardship for you or your organization? *Yes / No*

Question 22: Please explain why you would not be able to participate in the Evolving CAEECC WG without financial compensation. 1500 character maximum.

The Compensation Pilot Review Committee[7] applied the following eligibility criteria when selecting Grantees:

1. **Individuals/organizations that can bring historically underrepresented perspectives**, specifically those of Disadvantaged Communities (DAC), ESJ Communities, low-income households, low-income communities/census tracts, tribal lands, hard-to-reach customers, and those with "lived experience" to inform the justice, equity, diversity, and inclusion principles of CAEECC. This intention does not require an individual be formally engaged in an organization that does this work, only that they can contribute such perspectives.
2. **Individuals/organizations have a demonstrated financial need** in order to meaningfully participate. E.g. Participation would expose the individual/organization to financial hardship.
3. **Individuals/organizations are committed to the Evolving CAEECC WG process and requirements** and to making meaningful contributions.

Upon request by Committee Reviewers, the Pilot Administrators estimated funding amounts per Grantee based on the anticipated workload and activities of the Evolving CAEECC Working Group, which ultimately determined the maximum number of applicants the Pilot could support and the Review Committee could accept into the Pilot.

Lessons Learned: Recruitment and Application

- **Recruitment takes time and recruitment by volunteers, while immensely appreciated, can make the process slower and harder to evaluate.** The recruitment process resulted in more applications than anticipated and

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[7] The Compensation Pilot Review Committee invited volunteers from CAEECC; Composition, Diversity, Equity, and Inclusion Working Group; Compensation Task Force; and the CPUC Environmental and Social Justice Team who had not applied for Compensation themselves. The CAEECC Leadership Team (composed of the CAEECC Co-chairs and CPUC Energy Division Staff) was invited to be a part of the Review Committee process, but not as a voting member. The purpose of removing their voting ability for the Review Committee was to be cognizant of the existing power structure as well as to not have incumbent power over-influence the Evolving CAEECC Working Group (especially in the selection of its members). The Compensation Pilot Review Committee included:

- Voting Reviewers
    - CAEECC Members (Fabi Lao, CSE)
    - CAEECC Ex-officio (Emma Tomme, California Air Resources Board)
    - CAEECC Facilitation Team (Katie Abrams, Michelle Vigen Ralston, Suhaila Sikand)
- Non-voting Advisors
    - CAEECC Co-chairs (Lara Ettenson, NRDC and Lucy Morris, PG&E)
    - CPUC Energy Division Staff (Ely Jacobsohn)
- Non-voting, non-advising Observers: A few CPUC staff observed the Compensation Pilot Review Committee deliberations in preparation for the Equity and Access Grant Program and to learn from this review and application process to inform their grant program.

hoped for by those involved in recruitment and application review. However, even more time for recruitment would foster greater understanding about the Working Group, commitment, and expectations. A broad and organic outreach effort is also challenging to document fully and evaluate.

- **Establish clear criteria for review of applications and the total number of Grantees the Pilot can support prior to inviting Review Committee members.** The Application Review Committees were challenged by the liberal nature of the criteria and application review. The Facilitation Team persistently clarified that the applications for the Compensation Pilot was still objective, even if it felt like the eligibility criteria was unconventionally inclusive. The Facilitation Team recognized that subjectivity in both Member and Grantee selection would alter the makeup, and therefore outcomes, of the working group. Ultimately, applicant acceptance decisions, according to the Facilitation Team, should not be the purview of existing CAEECC Members or CAEECC-adjacent volunteers as it creates a power-dynamic in itself.

III. Mid-Point Pilot Evaluation Results

The Compensation Task Force Final Report recommended three evaluation criteria (see [Report Methodology](#) section). The evaluations results in this section are organized by these three criteria and the Additional Data as described in the Report Methodology.

Compensation Pilot versus Working Group Outcomes: Note, the Compensation Task Force Final Report strongly recommended that the success of the Pilot not be measured against the success of the Working Group. Thus, outcomes of the Working Group are intentionally not incorporated into this Evaluation Framework.

Criterion 1: Diversity of Perspectives included in Evolving CAEECC Working Group

The Compensation Task Force's Final Report requested specific information (see bullets below) regarding the makeup of the overall Evolving CAEECC Working Group as well as the makeup of the Compensation Pilot Grantees of accepted applicants and Grantees. Results are included in Table 1 below.

   a. **Percentage (and absolute #) of Evolving CAEECC WG overall that is/represents new individuals, organizations, and perspectives/expertise to CAEECC**

   b. **Percentage (and absolute #) of members of Evolving CAEECC WG from a CPUC ESJ Community that is receiving Compensation Pilot funds**

c. Percentage (and absolute #) of members of Evolving CAEECC WG that is new/represents a new stakeholder that is receiving Compensation Pilot funds

Table 1. Number and Percentage of Working Group Members and Grantees that Represent Specific Communities

	Historically underrepresented		CPUC ESJ Community		New to CAEECC[8] (no prior engagement in CAEECC/ CAEECC WG)	
	Percent	Number	Percent	Number	Percent	Number
Evolving CAEECC Working Group, *including Grantees*	66%	23/35	51%	18/35	49%	17/35
Grantees	100%	11/11	91%	10/11	73%	8/11

As required through the eligibility criteria of the Compensation Pilot, all Grantees are historically underrepresented. Historically underrepresented includes, but is not limited to, representatives of the following communities:

- CPUC Environmental and Social Justice Communities definition,[9]
- Disabled populations and those living with access and functional needs,
- LGBTQIA+,
- Immigrant and undocumented,
- People receiving bill assistance like California Alternate Rates for Energy (CARE) or Family Electric Rate Assistance Program (FERA),
- People with medical vulnerabilities,
- Unhoused individuals,
- Indigenous populations living in non-federally designated communities.

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[8] "New to CAEECC" numbers are based on cross-referencing if Working Group members or Grantees are or have been listed as a Member or Member organization at a CAEECC Meeting or in a CAEECC Working Group.

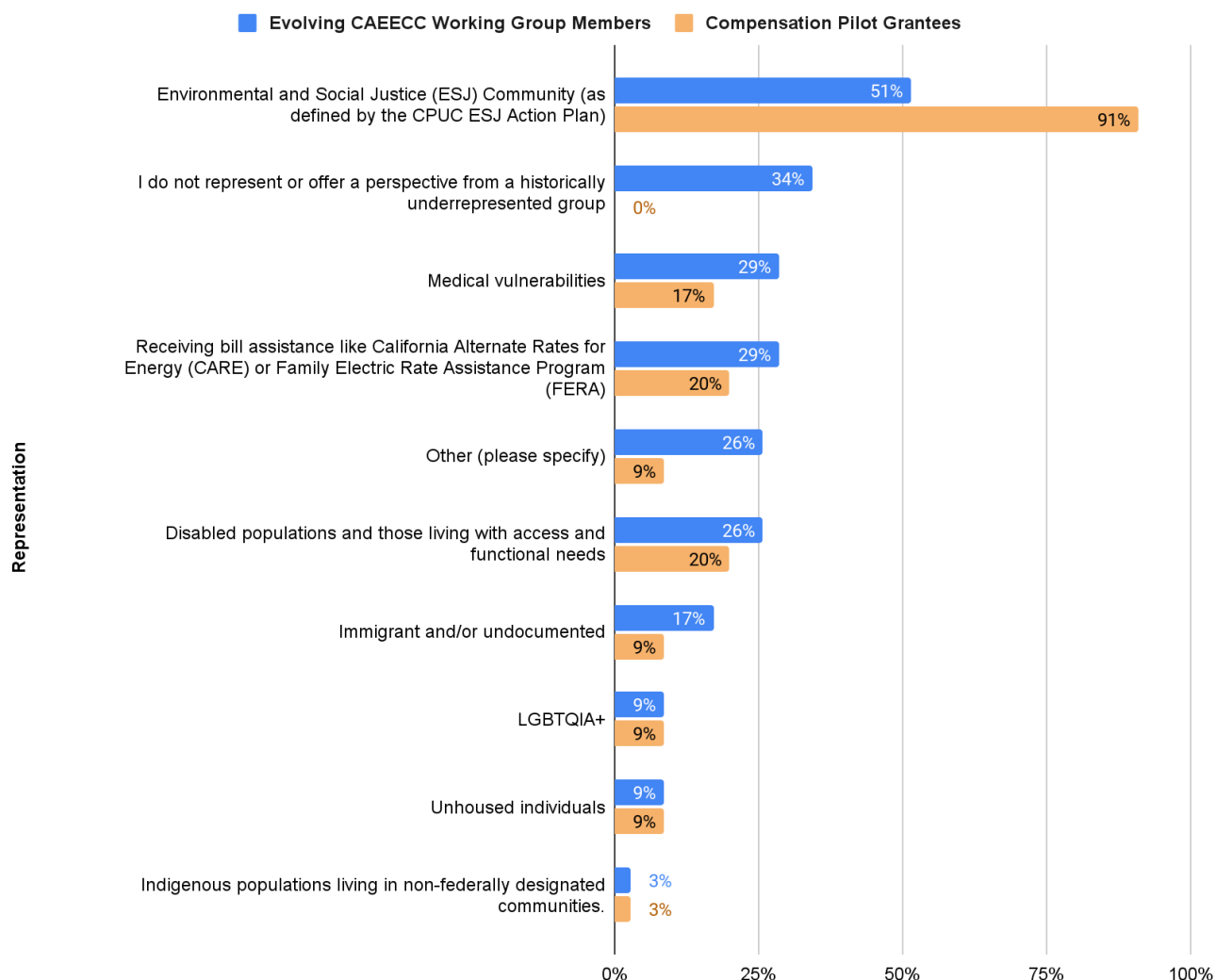[9] CPUC "Environmental and Social Justice Communities" are identified as those where residents are:
- Predominantly communities of color or low-income;
- Underrepresented in the policy setting or decision-making process;
- Subject to a disproportionate impact from one or more environmental hazards; and
- Likely to experience disparate implementation of environmental regulations and socio-economic investments in their communities.

These communities also include, but are not limited to:
- Disadvantaged Communities (Defined as census tracts that score in the top 25% of CalEnviroScreen 3.0, along with those that score within the highest 5% of CalEnviroScreen 3.0's Pollution Burden but do not receive an overall CalEnviroScreen score);
- All Tribal lands;
- Low-income households (Defined as household incomes below 80 percent of the area median income); and
- Low-income census tracts (Defined as census tracts where aggregated household incomes are less than 80 percent of area or state median income).

A breakdown of representation within the Compensation Pilot Grantees and the Evolving CAEECC Working Group is presented in Figure 3.

Figure 3. Percentage of Evolving CAEECC Working Group Members and Pilot Grantees Representing Historically Underserved Communities.

Criterion 2: Accessibility and ease of application process

The Compensation Task Force suggested evaluating the acceptance rate of Compensation Pilot applicants:

a. **Number of applicants for the Compensation Pilot**
b. **Rate of acceptance for Compensation Pilot**

In addition, the Facilitation Team inquired about the accuracy and clarity of recruitment outreach efforts as well as the simplicity and ease of applying for the Compensation Pilot through Evolving CAEECC Working Group surveys, Pilot Survey #1 and #2.

Fifty percent (50%) of all Evolving CAEECC Working Group Applicants expressed interest in the Compensation Pilot, while 42% applied.[10] Compensation was awarded to 69% of Compensation Pilot Applicants.

Table 2 identifies the number of applications for the Evolving CAEECC Working Group Members and Compensation Pilot, along with the number of applicants accepted for each.

Table 2. Number of applicants and rate of acceptance for the Evolving CAEECC Working Group and Compensation Pilot

	Applicants	Accepted	
	NUMBER	NUMBER	PERCENT
Evolving CAEECC Working Group	39	35/39	90%
Grantees	16	11/16	69%

Further, Pilot Survey #1 asked Evolving CAEECC Working Group members to rate the ease of the application. Overall, the application was considered clear, simple, and appropriate/relevant.

Table 3: Pilot Survey #1 Responses on Ease of the Application

	All		Grantees	
	AVG	MED	AVG	MED
The Evolving CAEECC Working Group application was clear, simple, and appropriate/relevant	4.9	5	5.2	5
Responses were on a scale of 1-6 with one being the lowest score and six being the highest. *AVG is the Average and MED is the Median.*				

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[10] After the application process, three Evolving CAEECC Working Group Members shared that they assumed their interpretation that Compensation would be awarded to all Evolving CAEECC Working Group Members and thus did not realize that the Compensation Pilot was application-based. Unfortunately, all Compensation Pilot funds had already been accounted for by that time. Due to this misunderstanding and the time commitment for the working group, one member withdrew their membership from the Evolving CAEECC Working Group.

One respondent noted that the application via SurveyMonkey was difficult to navigate and while there was a Word Document version of the Application questions, there were inconsistencies between the Application and the document.[11]

Lastly, the Pilot Administrators tracked retention of Working Group members and Grantees throughout the Working Group process.

Table 4: Retention of Evolving CAEECC Working Group membership and Compensation Pilot Grantees

	Meeting #1		Meeting #2		Meeting #3		Meeting #4	
	#	%	#	%	#	%	#	%
Evolving CAEECC Working Group	34/35	97%	32/35	91%	31/35	89%	29/35	83%
Grantees	11/11	100%	11/11	100%	11/11	100%	9/10	81%

Table 4 identifies the retention based on the 35 members of the original roster and the 11 initial Grantees of the Compensation Pilot. Prior to Meeting #1, an accepted Member of the Working Group withdrew due to medical reasons. Prior to Meeting #2, a member withdrew due to lack of compensation (they were not a Grantee) and another due to medical reasons. Prior to Meeting #3, a Member withdrew their membership as they were also withdrawing as a CAEECC Member (their successor lead did not show interest in joining this working group). Prior to Meeting #4, one Grantee withdrew their membership due to the time commitment of the Working Group itself. Another Grantee, prior to Meeting #4, noted that compensation was no longer needed. Both of these remaining funds will be redistributed across Compensation Pilot Grantees.

Criterion 3: Effectiveness of Outreach and Recruitment

Pilot Survey #1 asked questions about how Evolving CAEECC Working Group members learned about the Working Group and the communication about the Working Group, to understand the effectiveness of outreach and recruitment. The survey gathered data specifically around:

    a. **Percentage of Compensation Pilot recipients from direct outreach[12] efforts**
    b. **Number of Compensation Pilot recipients from direct outreach efforts**
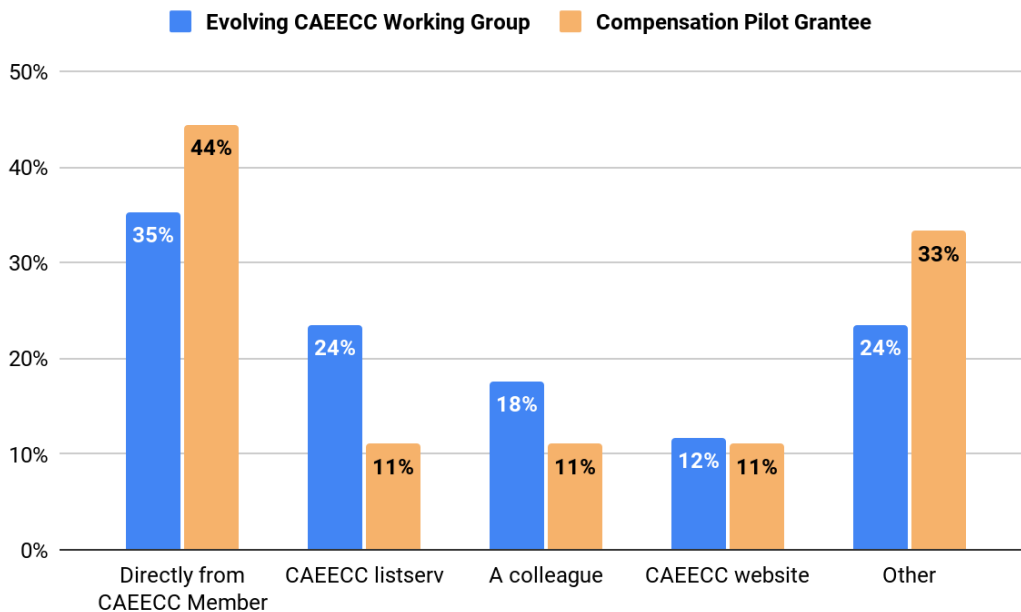
A substantial proportion of Evolving CAEECC Working Group Members learned about the Working Group from direct outreach from a CAEECC member (see Figure 4). While it

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[11] Presumably, these inconsistencies were due to grammatical errors (being updated in real-time in SurveyMonkey), or the formatting or survey logic being difficult to simulate via Word document.
[12] "Direct Outreach" includes personalized emails sent to individuals on a pre-identified list informed by the Composition, Diversity, Equity, and Inclusion Working Group, the Compensation Task Force, and Recruitment Team members. Direct outreach does not include emails sent through listservs as the vastness of such listservs is difficult to track.

can be assumed that direct outreach was by the Recruitment Team, it may also include direct outreach from other CAEECC Members who communicated about the opportunity to serve on the Evolving CAEECC Working Group. Other sources of outreach mentioned through the survey include: through a regional community-based organization (CBO) working group and a family member. One respondent did not remember how they heard about the working group.

Figure 4. Outreach Channels for Evolving CAEECC Working Group Members and Pilot Grantees.

Pilot Survey #1 also asked how effectively the purpose and intent of the Evolving CAEECC Working Group and the Compensation Pilot were communicated in outreach efforts. To understand a full scope of the communication, this question was asked both in Pilot Survey #1 and Pilot Survey #2 as a way to measure the effectiveness and accuracy of outreach once the Evolving CAEECC Working Group and Compensation Pilot were well underway.

The results (Table 5) show a decline in effectiveness of communication. This may be greatly in part to the Working Group seeking to re-define its purpose and scope of work between Pilot Surveys #1 and #2.

Table 5: Pilot Survey Responses on Effectiveness and Accuracy of Outreach Communications

Pilot Survey Question	Pilot Survey #1				Pilot Survey #2				Percent Change			
	All		Grantees		All		Grantees		All		Grantees	
	AVG	MED	AVG	MED	AVG	MED	AVG	MED	AVG	MED	AVG	MED

	AVG	MED	AVG	MED	AVG	MED	AVG	MED				
The purpose/intent of the **Evolving CAEECC Working Group** communicated through outreach prior to the launch of the working group matches the experienced purpose/intent.	4.8	5	4.9	5	3.7	3	4	3	-30%	-25%	-22%	-66%
The purpose/intent of the **Compensation Pilot** communicated through outreach prior to the launch of the Pilot matches the experienced purpose/intent.	4.9	5	4.9	5	4.4	5	4.4	4	-11%	0	-11%	-22%

Responses were on a scale of 1-6 with one being the lowest score and six being the highest. AVG is the Average and MED is the Median.

Additional Data to Help Improve Effectiveness of the Pilot

In addition, the Compensation Pilot Task Force recommended the collection of additional data to help inform and potentially improve the effectiveness of the Pilot.

    a. **Data on how funds were used and if any expenses were uncompensated**
    b. **Number of declined offers from recruitment outreach and reason(s) why (if available)**

The application acceptance to the Evolving CAEECC Working Group included two applicants to the Compensation Pilot whose requests were not filled due to ineligibility and lack of available funds. The former applicant (who was deemed ineligible to the Pilot) did not accept an invitation to the Evolving CAEECC Working Group because without compensation due to capacity limitations. The other applicant accepted the invitation to the Working Group despite not having enough funds to compensate them. One applicant to the Working Group was followed-up with during the application review period for more information on their application. Upon following up and learning about the working group, the applicant decided to withdraw their application prior to Review Committee decisions because they desired working directly on income-eligible programs, which CAEECC does not.

Budget Spent Summary

As of November 6, 2023, the budget spend in Table 6 represents invoices for approximately one-third of the planned Working Group process. While there remain three (3) of the six (6) Working Group meetings left, the vast majority of work, huddles, and an additional two CAEECC meetings (which Working Group members are encouraged to attend) remain ahead.

The Grantee budget spend is on track, considering the changes to the Grantee pool. The Administrative budget is over, though not necessarily substantially. Set up was anticipated to take a significant portion of funds. The day-to-day administration (Grantee support, invoicing support, invoicing processing, payment) is taking more time and resources than anticipated.

Table 6. Percent of Compensation Budget Used as of November 6, 2023

	Percent Used
Pilot Administrators	75%
Total of Grantee Budget	28%
Average of Grantees	31%
Median of Grantees	35%
Data as of 11/7/23. Does not include reserve for an in-person meeting that was not included in the Compensation Pilot Budget scope.	

Use of Funds

Working Group Time: For the most part, Grantees are using funds for time dedicated to Working Group activities such as attending Working Group Meetings (required), Huddles, contributing to homework, and for leadership team members to contribute to agenda development, and support the Working Group Members. Twenty-six percent (26%) of total funds spent at the time of this report have supported the time of Grantees.

Expenses: Some Grantees have expenses related to participation in the Working Group. One Grantee requires childcare to participate in any activities, and provides documentation to include those costs in their invoice. Less than 1% of total funds spent at the time of this report have gone towards expenses in support of Working Group participation.

Additional Requests: Grantees have expressed desire to use funds to meet among themselves to get to know each other better, have requested support to attend CAEECC meetings in-person, and to have an in-person Working Group meeting (potentially in 2024).

In order to manage funds equitably, and ensure sufficient resources for all Grantees, Pilot Administrators provided guidance on activities that are eligible for invoicing, and maximum hours for those activities. Activities outside of that guidance require pre-approval. For example, such activities may include additional meetings with Members to discuss Working Group business, that exceed hours budgeted for work in between meetings.

Lessons Learned: Mid-Point Evaluation

- **Although the Pilot Administrators compiled an outline of this report and Pilot Survey questions between recruitment and the launch of the Working Group/Pilot, more planning is needed to fully capture all the data points for this evaluation.** For example, the CAEECC Facilitation Team did not have sufficient data to properly estimate the number of Members and Grantees that were new to CAEECC. In addition, the administrative budget to do a more comprehensive evaluation is limited. For example, the Pilot Surveys may have benefitted from external review from the Compensation Task Force.

- **If requiring the completion of Evaluation and/or Pilot Surveys by Grantees, funding to cover evaluation and surveys is necessary. Moreover, if the Evaluation Surveys are not required by all, comparison of data is skewed.** While the assumption of the Facilitation Team would be for Members and Grantees to all fill out evaluations of Pilot Surveys (and meeting evaluations), in actuality, only a limited number did. This causes data that's derived from a smaller subset of participants and can be skewed. In addition, only a few questions were required to be answered, but by not requiring them, the Pilot Administrators created opportunities for data gaps.

- **If evaluation of data from applications is needed, require all participants to fill out the application, or expect to conduct individual outreach to fill data gaps.** It is CAEECC culture to not require CAEECC Members to fill out an application to a Working Group, instead, the norm is to allow them to simply send an email. As such, CAEECC members did not complete the same application form as non-CAEECC members, and so evaluation between the two groups (both part of the Evolving CAEECC Working Group membership) was difficult to complete.

- **Include opportunities for Grantees and Members to write personal anecdotes about their experiences in evaluations.** This would help remove bias from a report written by one party and invite additional qualitative data to make the evaluation more accurate to the experience. While the Pilot Administrators commit to this for the Compensation Pilot Final Report, the Mid-Pilot Evaluation Report is missing valuable information.

IV. Compensation Pilot Grantees Experience

Overall, there have been positive sentiments towards the Pilot. While amendments and modifications have been needed, the existence of the Pilot itself is appreciated and valued.

Benefit of the Pilot to the Working Group

In Pilot Survey #2, all Evolving CAEECC Working Group Members were asked about the benefit of the Pilot, and as noted in Table 7, there was strong agreement for the benefit of the program.

Through open-text responses, many survey respondents elaborated that key voices in the Working Group would not be able to participate without funding and that would be a detriment to the Working Group.

A few Grantees noted the budget for the Pilot is inadequate and limiting for Grantees, which could contribute to inequitable power-imbalances due to the time limits given to Grantees versus non-Pilot participants.[13]

Table 7. Pilot Survey #2: Benefit of the Compensation Pilot (asked to all Evolving CAEECC Working Group members, including Grantees)

	All		Grantees	
	AVG	MED	AVG	MED
The Evolving CAEECC WG is **benefitting** from offering a Compensation Pilot.	5.4	6.0	5.4	5.7
Responses were on a scale of 1-6 with one being the lowest score and six being the highest. *AVG is the Average and MED is the Median.*				

Understanding the Grantee Experience

The following section is based on snippets collected throughout the Working Group and Pilot process and evaluations. In the Compensation Pilot Final Report, the Pilot Administrators plan to invite Grantees and Evolving CAEECC Working Group Members to add their personal reflections via an Attachment to the report.

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[13] Non-Pilot participants also have limitations on their time, even if employer-supported, but the nature of the constraint is still one of a position of privilege.

Importance of the Pilot

Grantees have expressed the importance of the Pilot throughout the Working Group process and have also commented on the budget constraints for Working Group activities. Grantees have mixed perspectives about the Pilot actually enabling and supporting their participation in the Working Group holistically (see Table 8). Many Grantees indicated broadly that the Pilot enables their participation in the time-consuming Working Group, as otherwise they would have to take time off during work to participate, and that with compensation, they are able to learn about the energy efficiency industry a little more.

Amount of Funding and Enabling Participation

Overall, the presence of funding enables Grantees to participate in the working group:

- For some Grantees, their other work commitments would not cover participation in it.
- Several Grantees expressed that the amount of funding is insufficient and, as one Grantee pointed out, not a family-supporting wage.
- Many Grantees indicated that they've spent time beyond the allotted budget maximums to enable their learning of the industry, CAEECC, and participate in homework, while one pointed to the limited compensation pool as a constraint on their ability to fully participate in homeworks.
- One Grantee expressed that compensation is not as important as appreciating and valuing both Working Group Member time and perspectives. This Grantee noted they would rather use their time to participate in the Working Group than invoice for Compensation (they have resigned from the Compensation Pilot but remain in the Working Group).

Table 8. Pilot Survey #2: Grantees Feeling Supported by the Compensation Pilot

	AVG	MED
Thus far, the Compensation Pilot **has enabled** me to participate in the Evolving CAEECC Working Group.	4.0	5.0
I **feel supported financially** by the Compensation Pilot for the Evolving CAEECC WG.	4.3	5.0
Responses were on a scale of 1-6 with one being the lowest score and six being the highest. *AVG is the Average and MED is the Median.*		

Moreover, Grantees have noted that the Compensation Pilot is not meeting *all* the financial needs for participation in the Evolving CAEECC Working Group (see Table 9). Grantees indicated challenges to full participation in the Evolving CAEEC Working Group including the denial of requests for additional time and resources to support

participation and enabling time and capacity to properly meet other Members of the Working Group and build trust.

In addition, one Grantee noted an unexpected barrier regarding eligibility in state and federal low-income programs like SNAP and Medi-Cal, thus reducing the total effective hourly compensation from the $150/hour Compensation Pilot rate to $88/hour after losing benefits. This Grantee was grateful for the Pilot, however noted that they would need to spend additional time to reapply for these benefit programs due to the funding.

Table 9. Pilot Survey #2: Enabling Participation in the Evolving CAEECC Working Group

	Yes	No
The Compensation Pilot has covered *all* my financial needs for participation and active engagement in the Evolving CAEECC WG.	56%	44%
Responses were on a scale of 1-6 with one being the lowest score and six being the highest. *AVG is the Average and MED is the Median.*		

Continued Need for the Pilot

It is important to note that compensation does not create more time or capacity. The Compensation Pilot, when developed, recognized that it addresses one of many different barriers to participation in regulatory processes. Compensation may not be able to reduce barriers related to the deep orientation and training on a complex system or technical topic, address conflicts with meeting times, or provide full accommodation to all learning styles, engagement needs, or accessibility needs.

Prior to Pilot Survey #2, another Grantee withdrew their membership from the Evolving CAEECC Working Group entirely presumably due to the time commitment. At the time of Pilot Survey #2, all but one Grantee (9/10 Grantees who responded) noted that to continue participating in the Evolving CAEECC Working Group, they'd need compensation.[14] One Grantee expressed that the Pilot should not be compensating businesses and another Grantee expressed that the design of the Pilot is inadequate and should be revised in a collective and collaborative process.

Another Grantee was offended by this question, specifically that they would be asked to confirm their financial need mid-Pilot. *It is of note that the question on continued need was a request from the Compensation Task Force to measure if someone's status had made them ineligible during the course of the Working Group.*

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[14] The one Grantee that indicated they'd no longer need compensation but offered no explanation in Pilot Survey #2. Upon followup, this Grantee indicated that they support the mission of the Working Group but the time commitment for Homework, 4 hour meetings, and invoicing are too much given their other priorities. This Grantee is continuing in the working group, but not in the Pilot.

Lessons Learned: Grantee Experience

- **The ways in which the Pilot was set-up factor the outcomes. In particular, the lived/living experiences of those who created the Pilot influence the assumptions of the Pilot, and therefore, may mismatch the experience of Grantees.** Grantees noted that the funding amounts were insufficient to the amount of work required, some either billed true to the hours spent and received only partial funding and others underbilled, knowing the maximums in place. Moreover, the Compensation Task Force did not design the rate as a family-sustaining wage, however it did consider the time, value, and overhead of Grantees.

- **Ultimately, the benefit of the opportunity for funding cannot be understated.** Grantees have stated multiple times that the opportunity for funding is an enormous step towards equity.

- **More funding is needed to properly support historically underrepresented voices in a "new" space.** The amount of funding is inadequate to support the level of participation a CAEECC working group requires. In addition, funding for onboarding should be expanded as the regulatory space is complex and convoluted for new stakeholders to easily engage.

V. Administration of the Compensation Pilot

Setting Up the Compensation Pilot

The CPUC, in granting funds, supported the Compensation Pilot Task Force's Final Report, but specifically declined to adopt it, "in favor of affording flexibility to the Program Administrator."[15] The Pilot Administrator has sought to be consistent with the Compensation Pilot Task Force's Final Report in the administration and implementation of the Pilot. The following sub-sections describes the steps taken to set up the Compensation Pilot.

Budget

The Pilot Administrator used the CAEECC-adopted Evolving CAEECC Working Group Prospectus to develop a schedule of meetings, huddles, homework, report writing, workshops, and CAEECC meetings that Grantees would need to be supported to attend and participate in. This led to the creation of a budget of the Pilot funds reserved for compensation, designed to ensure sufficient funds for all Grantees to fully participate in

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[15] Decision 23-04-009 (April 7, 2023)

the whole Working Group process. The per-Grantee budget also determined the maximum number of Grantees that would be accepted into the Pilot.

Grantee Guidance

Prior to Meeting #1, the Pilot Administrators prepared and issued a Compensation Pilot Handbook (Handbook) (see Appendix B) as a reference for all Grantees. The Handbook outlined the process for invoicing (submission and approval) as well as the purpose of the Pilot and task-specific budgets.

The Handbook information was conveyed by email, in meetings, and in phone calls when needed. At Meeting #1, the Facilitation Team set aside almost thirty minutes for a closed session[16] with Compensation Pilot Grantees and Pilot Administrators to walk through the Compensation Pilot Handbook.

The Handbook provided budget guidance for tasks, known as the Budget Guidance Breakdown. Table 10 outlines the budget guidance per grantee. Pilot Administrators communicated to Grantees that invoicing would need to follow the Handbook and that activities should be designated in one of the categories listed in Table 10. Any other activities would need to seek prior approval from Pilot Administrators via email.

Table 10. Compensation Pilot Budget Guidance Outline per Grantee

Activity	Description	Estimated Hours per Activity
Onboarding Review	Review of materials and ground-setting into the CAEECC universe	Up to 5 hours
Evolving CAEECC Working Group Meeting Participation	Attendance at the 6 Working Group Meetings *(meetings directly related to the development of recommendations for the working group)*	Duration of meetings (Average 4 hours each Meeting)
Work Between Meetings	Work completed between ECWG meetings, such as assigned homeworks, meeting material review, participation in subgroup meetings (Huddles), completion of evaluation surveys, check-ins with leadership team, etc.	Up to 5.5 hours for each Work-Between Meetings
Other Pre-Authorized Meeting Participation	Attendance and participation at up to: • 3 Full CAEECC Quarterly Meetings • 1 ECWG x CAEECC Workshop • 1 ECWG x Public Forum Includes review of Meeting Materials.	TBD Duration of meetings + any prep or follow-up

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[16] The Pilot Administrators opted for a closed session to protect the identities of Grantees.

Additional Expenses	Expenses necessary for participation in required meetings and work between meetings	*Granted per request, pending budget availability and request relevancy*
Leadership (for leadership team only)	Activities pertaining to Leadership Team including Monthly Meetings and WG Check Ins	Up to 1 hour for each Meeting

Setting up Pilot Payments

To set up payments, Grantees were asked to provide their W9 as well as direct deposit information via Intuit Quickbooks Online, the elected payment system for the Pilot Administrators. The Pilot Administrators allowed non-direct deposit payments, but none were requested. Three Grantees did not provide their information until one to two months after the first Working Group meeting. The Pilot Administrator already had established payment servicing with Intuit Quickbooks Online. Using this system would allow for sufficient tracking of documentation, all payments, and not require initial upfront software cost nor additional cost to facilitate direct deposit payments to Grantees. The Pilot Administrators preferred using Intuit Quickbooks Online to handle the sensitive information of Grantees (W-9 forms and banking information). In some cases, when Grantees had difficulty with the Quickbooks Online system, the Pilot Administrators manually collected and inputted W9 and banking information.

Invoicing

To ease potential cash flow issues common among invoiced income (e.g., work completed in month 1, is invoiced at the beginning of month 2, and often not paid out until the end of month 3), Pilot Administrators would allow invoicing twice a month and would pursue "seed funds" from the Compensation Pilot Budget to have funds on-hand to pay Grantees expeditiously. To allow for budgeting purposes, Grantees were required to invoice within 30-days of an activity.

The Pilot Administrators opted for a standardized invoicing process with the intent to simplify the Grantee invoicing experience (see Compensation Task Force Final Report pages 9-10) and to minimize the use of the Administration budget.

The Pilot Administrators, developed a Google Form by which Grantees could report hours spent on the standard activities (defined by the Handbook). The form also allowed Grantees to seek reimbursement of Additional Costs. The submission of the Google Form would generate a PDF invoice that the Pilot Administrators would review for accuracy and send to Grantees to confirm within a 2-day period. Within that 2-day period, Grantees would be able to raise concerns with the approved invoice.

Administration Challenges

Compensation Budget Management

Managing the budget of compensation funds has been an ongoing challenge as the scope, schedule, and activities of the Evolving CAEECC Working Group have been changing on a regular basis.

The Compensation Pilot funds were budgeted prior to the final acceptance of Compensation Grantees to estimate how many Grantees the Pilot could support. Since then, the budget has had to change due to the following reasons:

- Greater need for onboarding and orientation
- Desire for Evolving CAEECC Working Group members to work in different ways (e.g., collaborative on homework, in addition to working individually on homework)
- Inclusion of Grantees in the Leadership team (requiring more time to be compensated)
- Increasing the size of the Leadership team mid-way (and budgeting for up to two more Grantee Leadership seats)
- Request for more co-creation of Working Group direction and additional time for certain members for that work
- Request for budget to support in-person participation at CAEECC meetings and Evolving CAEECC Working Group meeting(s)
- Resignation of members from the Working Group, the Compensation Pilot, or both

Initial Flexibility for Unapproved Requests for Compensation

Since this was a new program for Grantees and Pilot Administrators, it took some Grantees time to understand the requirements in the Handbook, budget maximums, and process to exceed those maximums.

For the first couple months, the Pilot Administrators tried to be flexible, offer some leniency on the Handbook guidance, and yet reiterate the guidelines with Grantees. The Pilot Administrators received several requests that were not envisioned in the budget and not pre-approved for payment:

- One Grantee invoiced for almost 260% of the budgeted amount between Meeting #2 and Meeting #3. The Pilot Administrators were able to compensate for 80% of invoiced hours as the Grantee had some remaining budget left from previous engagement allocations.
- Another Grantee requested compensation for participation at a few meetings tangential to the Evolving CAEECC Working Group; this was only partially compensated due to the looser relevancy of these meetings.

- Another Grantee requested compensation for a call with another Working Group Member that was not pre-approved. At first, the Pilot Administrators denied this request because the Grantee had already fully maxed out their Homework budget. However, the Grantee protested that the meeting enabled them to participate in the Homework, and on these grounds as a one-time grace, the Pilot Administrators granted this invoice request.

In August 2023, the Pilot Administrators had received a handful of requests to compensate for time on relevant activities, but not those laid out in the Handbook. An email was sent out to all Grantees that the Pilot Handbook would be enforced as written. The option remains open to request pre-approval for compensation for relevant activities Grantees may engage in.

Grantee Invoicing Challenges

While the invoicing process was meant to be straightforward and simple to use, there was a learning curve to the process. Challenges and lessons learned included:

- Grantees needed to save the URL to the Google Form (which was also provided in the Pilot Handbook and in multiple emails to Grantees), but some requested the URL several times throughout the Pilot.
- The way the form was set up allowed for a comment box only at the beginning of the form, and not throughout. It was later noted that Grantees would prefer comment boxes throughout the invoicing form, however the Pilot Administrators could not implement without a significant overhaul of the backend system.
- Some Grantees found it cumbersome to have to invoice at all versus just getting payments for participation in meetings. The Pilot Administrators noted that the latter does not allow for compensation on prep work for meetings or work between meetings, which for this Working Group was anticipated to be significant.
- While the Pilot Administrator strove to secure budget upfront to facilitate faster payments, the up-to-45 day invoice payout timeline was too long for some. The first invoice was paid in 46 days (over the 45-day policy by one day), in part due to the Pilot Administrator's sick leave. By this Mid-Pilot Report, the Pilot Administrator's payments were within a week of a confirmed invoice.

Ease of Invoicing

Despite the challenges, especially earlier in the process, survey results generally show the invoicing and payment process has been effective (Table 11).

Table 11. Pilot Survey #2: Grantee Payment Process for the Compensation Pilot

	AVG	MED
Thus far, **invoicing** for compensation has been simple, easy, and clear.	4.3	5.0
Thus far, **receiving** compensation has been simple and timely.	4.3	5.0
Responses were on a scale of 1-6 with one being the lowest score and six being the highest. *AVG is the Average and MED is the Median.*		

Importantly, the ease of invoicing may not be the only barrier. One Grantee noted it was easy to invoice but they had not stayed on top of the invoicing schedule.

Invoicing Schedule

Grantees vary on their cadence of invoicing, some invoice immediately after or within a few days of an engagement, while others wait almost 30 days to invoice and/or forfeit their invoicing due to the 30-day invoicing policy. Prior to August 2023, the Pilot Administrators, as Grantees were learning the process, allowed some late invoices. In August 2023, the Pilot Administrators communicated the need for timely invoicing. To the extent possible and support inclusive process, the Pilot Administrators have allowed a few days leniency, especially if a Grantee reached out with questions. These accommodations accumulate and can make budgeting future compensation funds more difficult over time.

Uneven Utilization of Compensation Funds across Grantees

The use of funding has been diverse among Grantees thus far:

- Some Grantees regularly max out their budgets due to fully participating in all Working Group activities.
- Some Grantees invoice much more conservative amounts of funding to support the level of engagement they are able to dedicate to this working group.
- Grantees, in some way or another, are using each budget activity, including one Grantee who has been pre-approved for family care reimbursements during Working Group activities.
- One Grantee noted in a one-on-one conversation that they've been trying to be as honest and ethical in their invoicing as possible.

Inadequate Administrative Budget

At the set up of the Compensation Pilot, 15% of the budget was recommended for the Administration. The scope of this was to administer and implement the program to recruit, set up Grantees, develop and convey guidelines, and handle payments and invoicing. Administration also would include this mid-point evaluation report and a final evaluation report of the Pilot.

The 15% number is above standard for administrative carve-outs (typically, closer to 10%). The Compensation Task Force anticipated administration being higher for this Pilot. A bottoms-up budgeting exercise was not completed, which would have considered all the recommendations in the Compensation Task Force Final Report, and likely would have produced a higher amount.

As of November 6, 2023, the Pilot Administrators have used 75% of the Administration budget (the Working Group is approximately halfway completed.) This may not be considered abnormal, considering the upfront work to set up the Pilot, however, the Pilot Administrators have observed several aspects of this Pilot that, in retrospect, should have warranted planning for additional resources or other support:

- To accommodate a more frequent invoicing schedule and more regular payments, it became apparent that there would be very limited time to review invoices (rule of thumb of 5 minutes per invoice to process from receipt to payment). This was insufficient, but perhaps not significantly so, however, several other factors (next bullets) made this limitation impossible to meet.
- The verification process for invoices became cumbersome due to several Grantee invoices exceeding allocated maximums. This required emailing back and forth with Grantees, and in some cases, required scheduling a phone call to discuss. The Pilot Administration team would also have internal deliberations on how to handle each situation in a desire to provide as inclusive an experience as possible.
- When Grantees made requests for compensation for external activities, the Pilot Administrators would need to verify the activities and consult internally on how to handle them. In many cases, this meant checking the budget for surplus or anticipated surplus. In all cases, the Pilot Administrators understood the funds were intended to support Grantee engagement in the Working Group processes. To the extent that nexus could be confirmed and funds were available, the Pilot Administrators endeavored to authorize those payments.
- Lastly, the onboard process simply took much more time than anticipated. The Pilot Administration invested time in the Pilot Handbook to provide transparent and consistent guidance for all Grantees. Throughout the Pilot, the Pilot Administrators have had to communicate, educate, and help Grantees revisit this resource and information. This has added substantially to the administration budget.

Mid-Pilot Changes and Uncertainty

The Evolving CAEECC Working Group is undergoing its own important evolutions. This has impacted the Pilot in a few different ways:

- First, many Evolving CAEECC Working Group Members, including Grantees, expressed interest in spending time to understand the energy efficiency regulatory space, arguing that this knowledge and additional historic knowledge of CAEECC is essential to make recommendations. This called into question the amount of time needed to prepare Working Group members to effectively contribute to the Working Group processes, the amount of resources to support Grantees in their onboarding, and the cost of an extended Working Group timeline.
- Second, throughout the second and third meetings, it became clear that some Working Group members did not support the typical facilitation role often played in CAEECC working groups. Working Group members wanted time to process their own synthesis of member thoughts and input, time to work in real-time collaboration with one another to develop drafts, time to co-create agendas, and time for group-led discussions. The Facilitation Team/Pilot Administrators are generally in support of such approaches to community engagement and have experience running such processes, however, the budget and political constraints on this group have contributed to a tension that has led to division and distrust in the Working Group.
- Third, as the Working Group approaches its fourth meeting (of six planned and budgeted meetings), the Facilitation Team/Pilot Administrators are concerned (and have expressed) about the lack of unity behind a productive work plan, scope of work, and processes. The Pilot Administration team has re-budgeted several times now to understand the potential pathways forward for the Working Group at this point.

The goal and responsibility of the Pilot Administrators remains: to provide compensation to Grantees in whatever evolution the Working Group takes on. However, this becomes increasingly difficult to manage as the Working Group requirements and timeline remain uncertain with a continually shrinking compensation budget.

Lessons Learned: Pilot Administration

- **To provide flexibility, in the name of inclusion, a compensation program needs to anticipate rebalancing its budget to accommodate the shifting needs of Grantees and the working group process.** As mentioned before, the Pilot Administrators have sought to provide flexibility in accordance with the

Compensation Task Force's recommendations, but in doing so, have spent more administrative budget than anticipated.

- **Development of a "simple" system to invoice takes time. Instead, consider utilizing pre-made tools to streamline the invoicing process.** To avoid the costs of researching, paying for, and learning a backend process, the Pilot Administrators opted to use their own. This, however, had not been user-tested and has surfaced challenges to expeditiously processing invoices..

- **Consider automatically distributing funds for participation in Meetings where attendance is known. Separately, allow for invoicing of other time and expenses with supported documentation.** To allow for timely payments and least time-consuming methods of invoicing, blend automatic payments for known participation at Meetings (attendance is always taken) with options for Grantees to invoice time and expenses for other activities such as Homework, Huddles, etc.

- **A Handbook and Walkthrough are necessary to enable proper use of funds and comprehension of the process. However, more attention to guide Grantees may be necessary and should be budgeted.** While the Pilot Administrators only planned to guide Grantees once, a learning process should be much more interactive. Given the reliance on a semi-automated process, more time should be devoted to guiding Grantees.

VI. Conclusion

The Compensation Pilot is a critical element of the Evolving CAEECC Working Group and a means to alleviate a financial barrier to participation in the energy efficiency regulatory proceeding.

Going forward, the Pilot Administration remains committed to implementing the Pilot to ensure Grantees can participate as fully and as supported as possible in the Evolving CAEECC Working Group process.

Pilot Administration will continue to examine its costs, and consider ways to conserve resources for the remainder of the Pilot. It will try to do this while upholding the vision of the Compensation Task Force in its Final Report, and endeavor to maintain frequent and accessible invoicing, flexibility, and support for Grantees in the Pilot process.

VII. Appendix

Appendix A: Pilot Survey Questions

Pilot Survey #1

Purpose: Collect baseline data and understand the recruitment and application process.

- What historically underrepresented communities do you represent in this working group? Please self identify _____
- What motivates you to participate in this working group? _____
- Outreach
  - How did you hear about this WG? (*Directly from CAEECC Member, CAEECC listserv, a colleague, CAEECC website, other: _____*)
  - The purpose/intent of the WG was well-communicated in outreach efforts. *(Strongly Disagree, Disagree, Slightly Disagree, Slightly Agree, Agree, Strongly Agree)*
  - The purpose/intent of the Pilot was well-communicated in outreach efforts. *(Strongly Disagree, Disagree, Slightly Disagree, Slightly Agree, Agree, Strongly Agree)*
- Application Process
  - The application was clear, simple, and appropriate/relevant. *(Strongly Disagree, Disagree, Slightly Disagree, Slightly Agree, Agree, Strongly Agree)*
  - Application Process
- Did you apply for compensation through the Compensation Pilot? *(Yes/No)*
- Are you Compensation Pilot grantee? Were you awarded compensation through the Compensation Pilot? *(Yes/No)*
  - If yes:
    - Can you participate in the WG without the Compensation Pilot? *(Yes/No/Maybe)*
    - Please elaborate: _____

Pilot Survey #2

Purpose: Measure success and challenges of the Pilot, compare against the baseline

- The purpose/intent of the Evolving CAEECC WG communicated through outreach matches the experience purpose/intent. *(Strongly Disagree, Disagree, Slightly Disagree, Slightly Agree, Agree, Strongly Agree)*
- The purpose/intent of the Compensation Pilot communicated through outreach matches the experience purpose/intent. *(Strongly Disagree, Disagree, Slightly Disagree, Slightly Agree, Agree, Strongly Agree)*
- The Evolving CAEECC WG is benefitting from offering a compensation pilot. *(Strongly Disagree, Disagree, Slightly Disagree, Slightly Agree, Agree, Strongly Agree)*

- ○ Please elaborate: _____
- Are you Compensation Pilot grantee? *(Yes/No)*
  - ○ Thus far, the Compensation Pilot has enabled me to participate in the Evolving CAEECC Working Group. *(Strongly Disagree, Disagree, Slightly Disagree, Slightly Agree, Agree, Strongly Agree)*
  - ○ I feel supported financially by the compensation pilot. *(Strongly Disagree, Disagree, Slightly Disagree, Slightly Agree, Agree, Strongly Agree)*
  - ○ Thus far, invoicing for compensation has been simple and clear . *(Strongly Disagree, Disagree, Slightly Disagree, Slightly Agree, Agree, Strongly Agree)*
  - ○ Thus far, receiving compensation has been simple and timely. *(Strongly Disagree, Disagree, Slightly Disagree, Slightly Agree, Agree, Strongly Agree)*
  - ○ The Compensation Pilot has covered all my financial needs for participation and active engagement in the ECWG. *(Yes/No)*
    - ■ Please elaborate: _____
  - ○ I still need the Compensation Pilot to be able to actively engage and participate in ECWG. *(Yes/No/Maybe)*
    - ■ Please elaborate: _____
- Please add any additional comments or elaborations about the Compensation Pilot. _____

Appendix B: Compensation Pilot Handbook

Evolving CAEECC Working Group (ECWG) Compensation Pilot Handbook

This document contains information pertinent to the ECWG Compensation Pilot—the process for payment distribution, and guidelines for Grantees.

Table of Contents:

Overview

The Compensation Pilot ("Pilot") provides grants to participate in the California Energy Efficiency Coordinating Committee's (CAEECC) Evolving CAEECC Working Group. CAEECC, with funding authorization from the California Public Utilities Commission, developed the Pilot as an important way to address known barriers to engagement in the energy efficiency stakeholder engagement process.

This guidebook outlines various Pilot logistics and guidance on invoicing and budget to support participating Grantees.

As part of a Grantee's participation in the Pilot, Grantees are asked to

- complete several surveys throughout the Pilot to help inform and evaluate this process for future funding endeavors within CAEECC and beyond;
- attend all meetings (six Evolving CAEECC Working Group Meetings and up to three Full CAEECC Quarterly Meetings) or send alternates to represent themselves in their stead[1]; and
- complete and/or participate in Work Between Meetings as assigned.

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[1] Note: compensation can only be dispersed to the Grantee and not for any alternates the Grantee may send. If a grantee misses a meeting, they can request compensation for any catch-up work. When submitting the invoice for catch-up work, please note these hours in the Grantee Comments section of Page 2 of the Invoice Generator Form.

By accepting compensation, Grantees commit, to the extent within reason, to completing the asks listed above.

To accept compensation, Grantees will receive an email to set up Payment Distribution Information with the Pilot Administrator (Common Spark Consulting). This will require Grantees to **submit a Form W9 to Common Spark Consulting via a Quickbooks Information Request before 6/22/23.** If a Grantee cannot complete this setup, please contact Suhaila Sikand at Common Spark (suhaila@common-spark.com) ASAP.

Logistics

Key Players for the Pilot

Grantee: An approved applicant to the Compensation Pilot. Grantees submit invoices and receive payments.

Pilot Administrator: Common Spark Consulting (Michelle Vigen Ralston and Suhaila Sikand). Pilot Administrators review and approve invoices, distribute funds, and manage the Pilot's process and evaluation.

California Public Utilities Commission (CPUC): Regulatory agency overseeing the energy efficiency (EE) portfolio that authorized the Pilot. The CPUC will review the Pilot evaluation and has decision-making authority on possible future next steps relating to CAEECC and the Compensation Pilot.

Evolving CAEECC Working Group (ECWG): Compensation Pilot participants are funded to participate in the ECWG, a group tasked with exploring ways to make CAEECC more inclusive and aligned to the evolving EE portfolio. The ECWG is expected to meet at least six times over the course of eleven months. ECWG members also have the option to receive funding for attending a certain number of quarterly CAEECC meetings.

Invoicing Process

Submitting Invoices:

Grantees shall submit invoices on the 1st and 15th of every month using the [Compensation Pilot Invoice Generator Form](#) (if no costs have been incurred, no submission is needed). Invoices must be submitted within 30 days of work completed. Invoices should follow the [Budget Guidelines](#) detailed later in this document. *View [How To Submit My Invoice](#) for a step-by-step guide for invoice submission.*

The following list outlines key elements of the Invoice Generator Form:

- **Authorized Activities include:**[2]
  - Onboarding Review
  - ECWG Meeting Participation
  - Work Between Meetings
  - Other Pre-Authorized Meeting Participation (e.g. Full CAEECC Meetings, workshops)
  - Leadership Team Activities
- **Duration**: The duration is the time allocated to each activity estimated to the nearest 15-minute increment. Duration will be collected as a number. I.e. if Grantee A worked 1 hour and 40 minutes on ECWG Work Between Meetings, Grantee A would round up to 1 hour and 45 minutes and submit 1.75 through the Invoice Generator Form.
- **Additional Expenses**: This Compensation Pilot includes a set aside for Additional Expenses outside of each Activity. Additional Expenses are subject to approval and amount of funds remaining. **Additional expenses should be cleared for eligibility in advance—please reach out to the Pilot Administrator to confirm eligibility of any additional expenses prior to incurring and invoicing**. Each Additional Expense must include a description of the cost and its need as well as documentation like a receipt.
- **Comments:** This is an opportunity to send comments / questions about invoicing directly into the invoice itself, or to elaborate on any specific activities as needed. If a Grantee misses a meeting and partakes in catch-up work, Grantees should identify any hours of catch-up work in these comments.

The first invoicing due date is July 1, 2023 11:59pm Pacific.

Reviewing Invoices:

1. The Pilot Administrator will review the submitted invoice and ensure that costs are permissible, feasible, and reflective of activities. For example, Pilot Administrators will cross-check attendance at meetings with billed hours. If the Pilot Administrator finds issues or concerns with submitted invoices, Grantees may be asked to provide more information or modification.
2. The Pilot Administrator will generate a 'Finalized Invoice PDF'. Approved and unapproved costs will be noted on Confirmed Invoice.
3. Grantees will receive an email to review the Finalized Invoice. **Any amendments or objections to the Finalized Invoice need to be conveyed via email within 2 business days to suhaila@common-spark.com**, or the Finalized Invoice will process as sent.

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[2] *If at any point, Grantees find that there are billable hours or other expenses that fall outside these activities, please contact the Pilot Administrator to discuss.*

Finalized Invoice

The following elements describe how your Finalized Invoice is generated based on the information provided in the Compensation Pilot Invoice Generator Form. These elements are auto-calculated and Grantees will be able to review their invoice (step 3 under [Reviewing Invoices](#)).

- **Hourly**: The budgeted hourly rate per Grantee is standardized to $150/hour. This rate is applied throughout all activities unless otherwise noted.
- **Cost**: This is automatically-populated based on the duration inputted into the invoice. It is a simple calculation of hours multiplied by the hourly rate.
- **Approved Additional Expenses:** This column will populate any approved additional expenses for tallying into the Total per invoice.
- **Total:** This is the total payment amount for each Grantee per invoice and is a sum of all Authorized Activity Totals and Additional Expense.
- **Pilot Administrator Comments**: This box will explain Pilot Administrator's approval/denial requests for Additional Expenses and any other notes the Pilot Administrator may distinguish.

Payment Distribution

Finalized invoices will be paid out within 45 days; Common Spark will make every effort to pay as soon as funds are available. Funds will be distributed per Grantee based on the Payment Distribution Information provided.

Payments may be distributed via direct deposit or check as indicated by the Grantee in via email ASAP and by 6/22/23. If the Grantee selects to receive payment via direct deposit, the Grantee will receive a **Quickbooks Information Request**. If the Grantee opts to receive payment via check, the Grantee will be asked via email for a valid mailing address. All Form W9s will be submitted by Grantees via Quickbooks. *Money orders will not be possible.*

Note, due to the amount of funding, Grantees will be responsible for paying any taxes they may incur based on income they receive through the Compensation Pilot. Common Spark Consulting will send Form 1099s showing income in January 2024 and 2025 as appropriate.

Budget Guidelines

Budget Guidance Per Grantee

Grantees will be funded for participation in required meetings (for the duration of the meeting) and up to 3 hours (or otherwise noted) of work between meetings on an hourly basis at a standard rate of $150/hour for the duration of the Working Group. The

following table provides an overview of anticipated Working Group activities and hour and cost estimates for each activity. **Hour and cost estimates are provided as general guidance; each Grantee's actual hours and costs may differ and estimated budgets are flexible across activities** *if requested and approved by the Pilot Administrator in advance.*
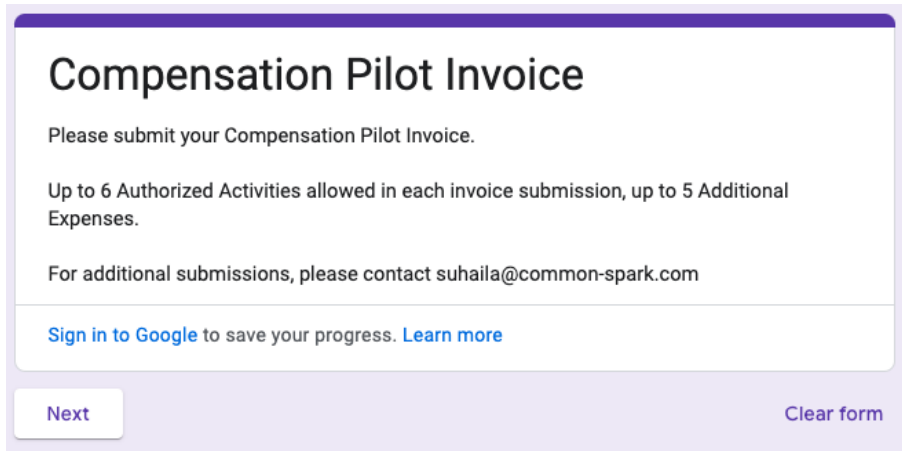
Grantees are asked to participate in ECWG meetings and to respond to evaluation surveys, at a minimum. If a Grantee anticipates expending their hourly guidance for any ECWG activities, they should set up a meeting with the Pilot Administrators as soon as possible. *An estimated use of the budget as depicted below is subject to change pending the availability of funds, required activities, and the Working Group scope evolution.*

Activity	Description	Estimated Hours per Activity
Onboarding Review	Review of materials and ground-setting into the CAEECC universe	Up to 5 hours
Evolving CAEECC Working Group Meeting Participation	Attendance at the 6 Working Group Meetings *(meetings directly related to the development of recommendations for the working group)*	Duration of meetings (Average 4 hours each Meeting)
Work Between Meetings	Work completed between ECWG meetings, such as assigned homeworks, meeting material review, participation in subgroup meetings (Huddles), completion of evaluation surveys, check-ins with leadership team, etc.	Up to 5.5 hours for each Work-Between Meetings
Other Pre-Authorized Meeting Participation	Attendance and participation at up to: • 3 Full CAEECC Quarterly Meetings • 1 ECWG x CAEECC Workshop • 1 ECWG x Public Forum Includes review of Meeting Materials.	TBD Duration of meetings + any prep or follow-up
Additional Expenses	Expenses necessary for participation in required meetings and work between meetings	*Granted per request, pending budget availability and request relevancy*
Leadership (for leadership team only)	Activities pertaining to Leadership Team including Monthly Meetings and WG Check Ins	Up to 1 hour for each Meeting

How To Submit My Invoice

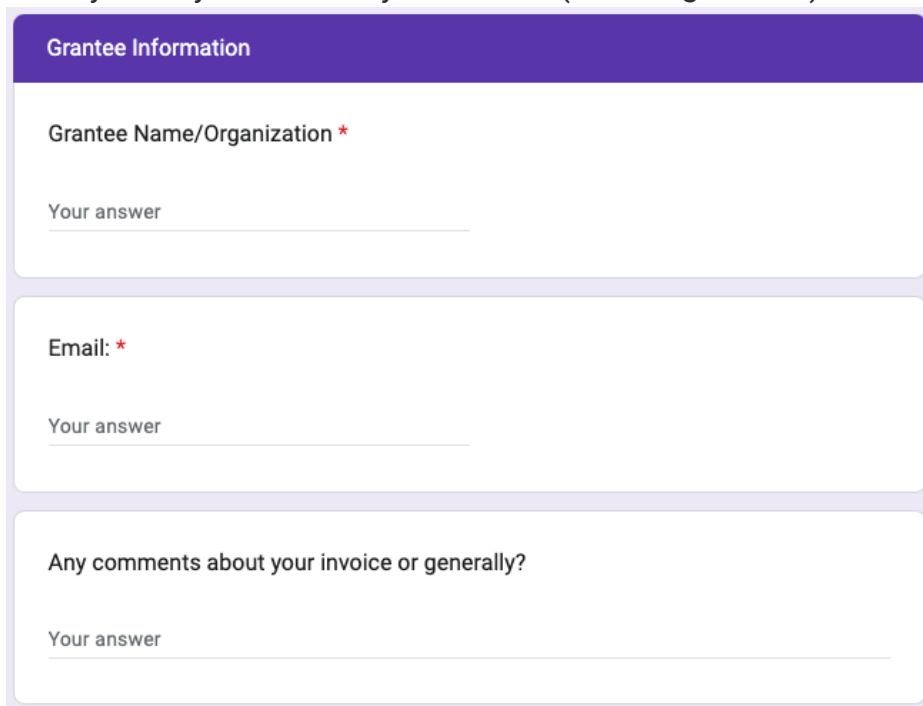The following section provides a step-by-step guide for Grantees to submit their invoices.

1. Navigate to the [Compensation Pilot Invoice Generator Form](#), you'll find a welcome page that outlines the submission guidelines (up to 6 Authorized Activities per invoice submission and up to 5 Additional Expenses, see image below).

Image 1: Invoice form page 1

2. On the second page of the form, you'll be asked to provide your Name/Organization and email for verification. You'll also be able to enter any notes you may have about your invoice (see image below).

Image 2: Invoice form page 2

3. On the third page of the form, you'll be asked to submit an Authorized Invoice Activity #1. Question one asks you to select the specific activity from the list. These activities include:

a. Onboarding Review
b. ECWG Meeting Participation
c. ECWG Work Between Meetings
d. Other Pre-Authorized Meeting Participation
e. Leadership Team Activities

Invoice Activity 1

Description of Authorized Activities:

- **Onboarding Review:** Review of materials and ground-setting into the CAEECC universe
- **Evolving CAEECC Working Group Meeting Participation:** Attendance at the 6 Working Group Meetings *(meetings directly related to the development of recommendations for the working group)*
- **Work Between Meetings:** Work completed between ECWG meetings, such as assigned homeworks, meeting material review, participation in subgroup meetings (Huddles), completion of evaluation surveys, check-ins with leadership team, etc.
- **Other Pre-Authorized Meeting Participation:** Attendance and participation (includes review of Meeting Materials) at up to : 3 Full CAEECC Quarterly Meetings, 1 ECWG x CAEECC Workshop, 1 ECWG x Public Forum
- **Leadership:** *for use of leadership team only.* Activities pertaining to Leadership Team including Monthly Meetings and WG Check Ins

If approved by the Pilot Administrator, Grantees may use the 'other' option to add in per-basis authorized activities not represented in the list above.
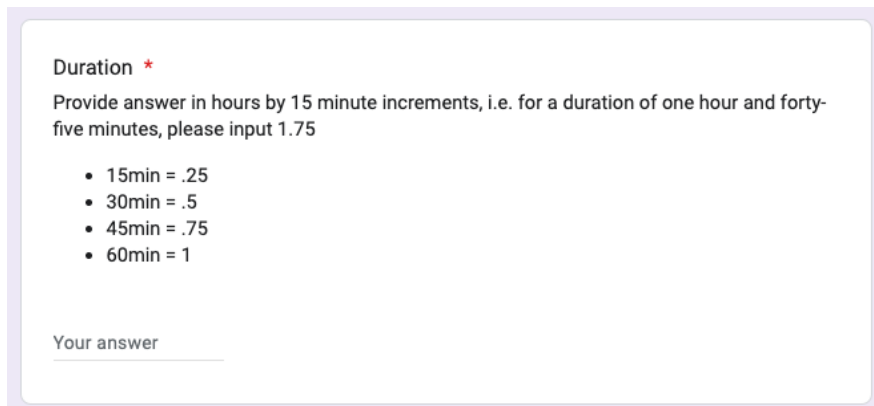
Duration of Authorized Activities:
Please sum up all durations per one activity per invoice period — if I split 'work between meetings' over 2 days of work for an hour each, please add both durations (two hours), round to the nearest 15min increment, then add to your invoice submission.

Select you Activity #1 from the List *

○ Onboarding Review

○ ECWG Meeting Participation

○ ECWG Work Between Meetings

○ Other Pre-Authorized Meeting Participation (i.e. Full CAEECC, ECWG x CAEECC Workshop, ECWG x Public Forum)

○ Leadership Team Activities (only for leadership team members)

○ Other: _____
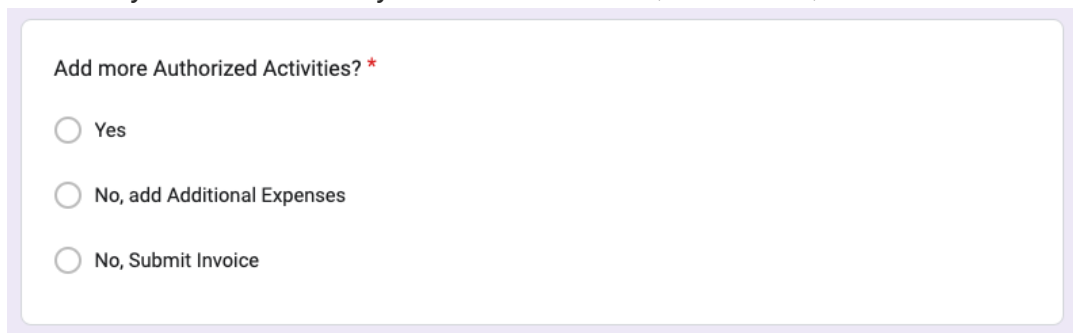
Image 3: Invoice form page 3, Question 1

4. Question #2 on Page 3 asks to provide a Duration for Activity #1 (sum up all durations per one activity per invoice period — if I split 'work between meetings' over 2 days of work for an hour each, please add both durations (two hours), round, then submit in the invoice). Duration needs to be inputted as a decimal rounded to the nearest 15-minute increment (or quarter). For example, for a duration of one hour and ten minutes (1h10m), you should enter 1.25. For easy calculation, the conversion of 15-minute increments is provided below:
   a. 15min = .25
   b. 30min = .5
   c. 45min = .75
   d. 60min = 1

Image 4: Invoice page 3 Question 2

5. Question #3 asks if you have additional Authorized Activities to add. To add Authorized Activities, click 'Yes' and repeat steps 3-5 as needed. To add Additional Expenses, select 'No, add Additional Expenses' and follow steps 6-8 below. If you don't have any other costs to add, select 'No, Submit Invoice'.

Image 5: Invoice form page 3, Question 3

6. Thank you for inputting all your Authorized Activities. You're now in the Additional Expenses Section. The first question on this page asks you to enter a description of the Additional Expense #1 you wish to submit. Please describe the expense and the need for each expense. As a reminder, all additional expenses must be approved by the Pilot Administrator and are granted based on funding availability

and a <u>need determination</u> (see image 6 below). If you don't have an additional expense, skip to step #8.

Additional Expense #1

Please email suhaila@common-spark.com with <u>all</u> receipts/documentation for Additional Expenses per invoice period in one email.

Additional Expense #1 Description
Please describe the item and the need

Your answer

Additional Expense #1 Price
Please enter a dollar amount **without a** $ sign

Your answer

Did you already send suhaila@common-spark.com your Additional Expense Documentation/Receipt via email?
Please email suhaila@common-spark.com with <u>all</u> receipts/documentation for Additional Expenses per invoice period in one email.

When sending your documentation, please name the file with your grantee name, invoice date, and brief description.

○ Yes, I did already

○ No, but I will after I submit this form

○ Other: _____

Add more Additional Expenses? *

○ Yes

○ No, Submit Invoice

Image 6: invoice form, Additional Expenses Questions

7. The second question on the Additional Expense #1 page asks you to submit a dollar amount of the cost <u>without the dollar sign</u>. If I request an Additional

Expense for a Co-working Space that costs $35, I would enter '35' into the input field (see image 6 above).

8. The third question is a reminder to send suhaila@common-spark.com an email with receipt/documentation for each Additional Expense in one email thread per invoice period (see image 6 above). For example, if I have 2 additional expenses, I'd send Suhaila one email titled: Invoice Documentation 6/15/23 with both documents attached and titled descriptively.

9. The last question on this page asks if you have more Additional Expenses to add. To add another Additional Expense, click 'Yes' and repeat steps 6-8 as needed. If you don't have any other costs to add, select 'No, Submit Invoice'.

10. After the Additional Expenses Section, the last page asks you to submit your invoice, **don't forget to hit 'Submit'.**

11. Within 2-5 Business Days of the 1st and 15th of each month, a member of the Pilot Administration Team will reach out to you via email to confirm receipt of your invoice with an attached Finalized Invoice (see below) based on Grantee submissions. **Grantees will be prompted to review the Finalized Invoice. Any amendments or objections to the Finalized Invoice need to be conveyed via email within 2 business days.**

Compensation Pilot Finalized Invoice PDF

Grantee: Suhaila Sikand

INVOICE DETAILS

Bill to:	Suhaila Sikand	**Invoice Submitted On:**	6/2/2023
Email:	test@common-spark.com	**Invoice #:**	CP005
		Payment Due On:	7/17/2023

AUTHORIZED ACTIVITIES

Activity	Duration	Hourly	Cost
Onboarding Review	3.00	$150.00	$450.00
ECWG Meeting Participation	3.00	$150.00	$450.00
Leadership Team Activities (only for leadership team mer	1.00	$150.00	$150.00
Other Pre-Authorized Meeting Participation (i.e. Full CAEE	0.50	$150.00	$75.00
ECWG Work Between Meetings	2.00	$150.00	$300.00
		$150.00	$0.00
		Total Authorized Activity Costs	**$1,425.00**

ADDITIONAL EXPENSES

Description of Expense and Need	Price	Approved Add'l Expenses
Coworking Space: Need to use a dedicated coworking space for a stable internet connection during my presentation to Full CAEECC on behalf of ECWG	$35.00	$35.00
Total Approved Add'l Expenses		**$35.00**

Grantee Comments

I emailed you ahead of time about the need for a coworking space to ensure a stable internet connection for my presentation to Full CAEECC. Billed for the duration of the CAEECC meeting only.

Total Authorized Activity Cost	$1,425.00
Total Approved Add'l Expenses	$35.00
Total:	**$1,460.00**

Pilot Administrator Comments

The additional expense was approved

Compensation Pilot Finalized Invoice PDF

Image 7: Finalized Invoice PDF example to be sent to Grantees