Coordination & Support for Sub-regional Tables & Outreach Committees

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Center for Sustainable Energy®

About CSE

Mission-driven national nonprofit

Center for Sustainable Energy® (CSE) is a national nonprofit that accelerates adoption of clean transportation and distributed energy through effective and equitable program design and administration.

- Leader in data-driven incentive program design and administration for:
  - Electric vehicle and EV charging incentive programs
  - Renewable energy incentive programs (solar and battery storage)
- Headquartered in San Diego with employees in Inland SoCal region and other parts of the state and nation
- Extensive experience in community outreach and engagement, marketing and research

Objective and trusted

- Governments, utilities and the private sector trust CSE for its data-driven and software-enabled approach to program design and administration, deep technical expertise and customer-focused team.
- CSE's fee-for-service model makes it an independent and unbiased trusted advisor and resource.
- CSE's data and insights have informed policy at the local, state and federal level.

One mission —

DECARBONIZE.®

Our vision is a future with sustainable, equitable and resilient transportation, buildings and communities.

Center for
Sustainable
Energy®

Agenda

1. CSE Team Introduction
2. Thrive Inland SoCal Regional Plan Phases
3. Goals for January - March
4. CSE's Support Roles
5. Coordination & Support Cycle
6. Where to Find Information on Google Drive
7. Next Steps

CSE Team – Main Points of Contact

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Greater San Bernardino, Community Engagement, Arts & Culture Committee, Business & Community Leaders Outreach Committee

*Resident of Inland SoCal region

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Thrive Inland SoCal Timeline

Timeline for Project Submissions and Regional Plan

Late February	March	April	May	June	July	August
	Draft SFP	Application Review Committee Created	Input on SFP, Technical Assistance	SFP for Round 1 Funding Opens	Round 1 Awards Announced	SFP for Round 2 Funding Opens

Catalyst Funding for Pre-Development

| Survey already released | Outreach & Data Collection | Outreach & Data Collection/ Input from Subregions | Equity Council Input | Plan Finished | Review | Submission to State |

Thrive Regional Economic Plan

| | Refine Project Criteria | Application Review Committee Created | Requests for submissions open | Proposals Reviewed by IPC | | Implementation Proposals Submitted to State |

Implementation Funding for Shovel-Ready Projects

Thrive Inland SoCal Regional Plan Phase 1

September - December 2023

- Research teams submit draft research reports that describe the region and economy, and convenors submit draft report to EDD.

- Outreach committees work with Research teams to gather community input on what constitutes a "good job," climate issues, and public health.

- SRTs and Inclusive Planning Counsel (IPC) select chairs.

- SRTs and outreach committees begin initial outreach and engagement efforts; draft 2024 plans for hosting events/meetings.

Thrive Inland SoCal Regional Plan Phase 2

January - February 2024

- [Review highlights from draft research reports](#) to inform outreach and engagement plans.
- Review regional plan outline (forthcoming from conveners/Research Team) and identify places for community insights.
- Focus on gathering community insights from affinity groups on:
  - What employment sectors and pipelines should our community invest in the next 5-10 years? Where are the opportunities in each subregion?
  - What capacity do we have in each subregion?
  - What are the strengths of individual organizations in each subregion? What partnerships do individual organizations need to pursue to create sustainable growth in the region?
- Provide networking opportunity/entry points for future collaboration and partnerships.

Thrive Inland SoCal Regional Plan Phase 3

March - May 2024

- SRTs and outreach committees continue outreach work and gathering input on the regional plan in March - May through the Strategy Development phase led by the Brookings team.

- (If funded by the State) Project teams submit project plans to Convener team between April 15 - May 3. Projects selected by IPC with community input and plan finalized May 3 - May 24.

Thrive Inland SoCal Regional Plan Phase 3, cont.

June - August 2024

- Final regional economic development report approved by IPC and submitted to EDD by August 31 (discuss requirements; framework coming).

SRT and Committee Goals for Next Three Months: January-March

1. **Develop outreach and engagement plan**
   a. Review Thrive research and summaries of community input and engagement from 2023 to inform 2024 engagement plans.
   b. Submit draft engagement plan to CSE by January 24 for review/collation across SRTs.
2. **Gather community insights to include in regional plan**
   a. What employment sectors and pipelines should our community invest in the next 5-10 years? Where are the opportunities in each subregion?
   b. What capacity do we have in each subregion?
   c. What are the strengths of individual organizations in each subregion? What partnerships do individual organizations need to pursue to create sustainable growth in the region?
3. **Engage with community members from each affinity group**
   a. Update attendee lists (CSE will update Thrive Engagement Map).
4. **Provide networking opportunities for future collaboration and partnership**
   a. Help SRT and committee members create new networks with organizations across affinity groups, sectors, and areas of strength. The goal is to support the creation of and access to living wage jobs in sectors that are contributing to regional sustainability.

SRT and Committee Goals for Next Three Months: March-May

1. **Fill out Inventory for Capacity spreadsheet (due April 16th)**
   a. Directions and more information for this inventory exercise.
2. **Implement March, April, and May agendas**
   a. March - Discuss barriers to opportunities and existing solutions and identify existing efforts to address those barriers and actions / investments needed (with emphasis on historically disinvested communities)
   b. April - Explore public health, climate, and environmental concerns within subregions and identify existing efforts to address concerns, and actions / investments needed (with emphasis on historically disinvested communities)
   c. May - Review and discuss revised strategies and provide feedback on draft implementation plan and performance metrics
3. **Continue working with CSE to gather community insights**
   a. We will continue collecting community insights through the March, April, and May meetings. The topics we will be collecting insights on are above. This information will be referenced for strategy development and the Regional Plan.
4. **Continue engaging with all affinity groups**
   a. Through May, continue conducting outreach to all affinity groups and encouraging new people to participate.
5. **Continue providing networking opportunities for future collaboration and partnership**
   a. Help SRT and committee members create new networks with organizations across affinity groups, sectors, and areas of strength. The goal is to support the creation of and access to living wage jobs in sectors that are contributing to regional sustainability.

CSE's Support Roles

Outreach & Engagement Support

- Create Outreach & Engagement Plan Template
- Support with gathering community insights through various methods (e.g., group activity, survey, interview)
- Summarize community insights and share with SRTs and committees for transparency and feedback
- Provide guidance on any outreach gaps/opportunities
- Be a sounding board for new ideas
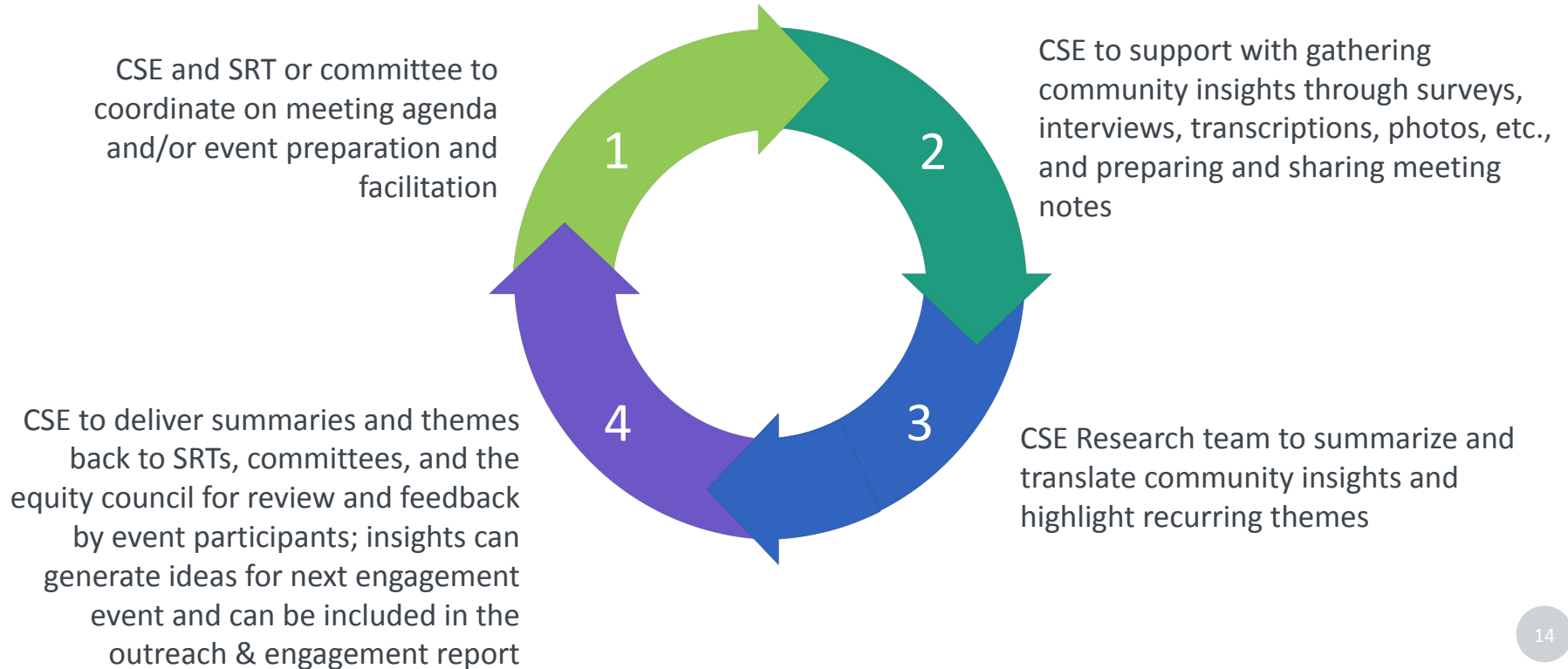
Thrive Engagement Map

- Combine stakeholder lists from SRTs, committees, general Thrive meetings
- Create interactive map to show Thrive participant activity by cities, opportunity zones, organization names
- Provide downloadable lists of participating organizations
- Update periodically with new participants

Event/Meeting Planning Facilitation

- Planning – Agenda, activities, event layout, other support
- Material creation – Presentation, survey creation, interactive sticky note boards, marketing/display materials
- Moderator/facilitator support
- Local students can be engaged to support planning and facilitation
- Event set up and breakdown
- Event debrief and notes

Coordination & Support Cycle

1 — CSE and SRT or committee to coordinate on meeting agenda and/or event preparation and facilitation

2 — CSE to support with gathering community insights through surveys, interviews, transcriptions, photos, etc., and preparing and sharing meeting notes

3 — CSE Research team to summarize and translate community insights and highlight recurring themes

4 — CSE to deliver summaries and themes back to SRTs, committees, and the equity council for review and feedback by event participants; insights can generate ideas for next engagement event and can be included in the outreach & engagement report

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Where to Find Information on Google Drive

Thrive Subregional Google Drive
- Individual SRT / Committee Folder
  - Templates & Tools *(linked from CSE folder)*
  - IELI & IEGO Guidance & Policies *(linked from Thrive folder)*
  - Tracking Documents *(linked from CSE folder)*
  - Raw Notes & Summaries *(linked from CSE folder)*
  - Outreach & Engagement Plan *(doc)*
  - Attendee List *(doc)*
  - Events & Meeting Plans *(folder)*
    - Agenda
    - Run of the show notes
    - Marketing tools
    - Insights collection tools
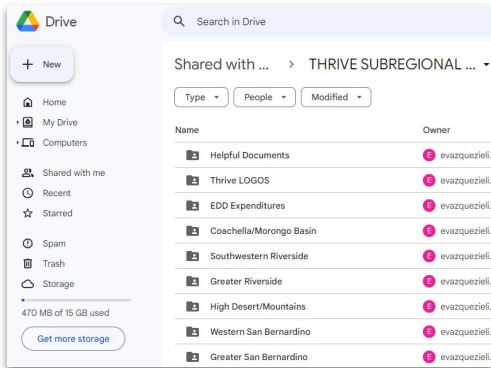
Access Levels for SRTs, Committees, and CSE

1. **Individual SRT or committee folder**
   a. SRTs and committees - edit access
   b. CSE - edit access
2. **Raw notes folder**
   a. SRTs and committees - edit access
   b. CSE - edit access
3. ****Summary folder**
   a. SRTs and committees - view only
   b. CSE - edit access
4. ****Translated summaries folder**
   a. SRTs and committees - view only
   b. CSE - edit access

**Summary feedback can be submitted through this Google form

Where to Find Information on Google Drive
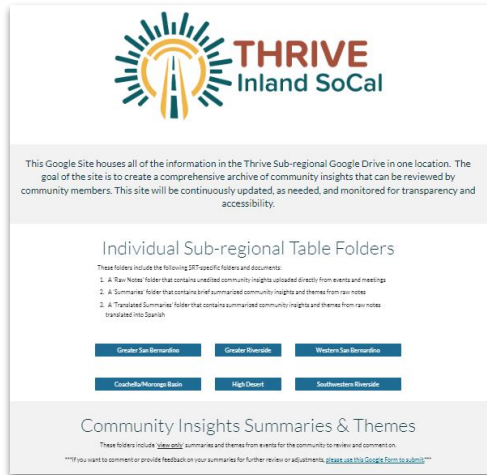
Google Site

- Central location for links to folders, summaries, templates, guidance, Thrive website, etc.

- Provides communities with access to summaries of community insights for feedback and reference.

- Monitored for accessibility and directions included for Spanish translation.

Quick Links

Templates and Tools Folder

1. Outreach & Engagement Plan Template
2. Event Planning Template - online
3. Event Planning Template - in-person
4. Event Planning Toolkit
5. Tools for Gathering Community Insights
6. Event Note Taking Template
7. SRT Meeting Note Taking Template
8. (Draft) Community Insights Collection Policy
9. (Draft) Data Collection Policy for Thrive Inland SoCal Engagement Map

Helpful Documents Folder

1. Includes all guidance and policies from IEGO and IELI after discussion, Governance review, and vote.
2. 12/31 Research Summaries
3. Guidance on Building Partnerships (outreach)

Tracking Documents

1. Event Tracking Spreadsheet
2. (Draft) Thrive Engagement Map
3. Document Catalog
4. Question Log

Next Steps

Meet with Your CSE Point of Contact

Please work with your CSE Point of Contact to coordinate a call to discuss immediate & upcoming support needed and share phone numbers, if desired.

Outreach & Engagement Plan Template (Due to CSE January 24th)

Begin filling out the Outreach & Engagement Plan Template and reach out to your CSE Point of Contact if support is needed.

Attendee/Participation (e.g., Zoom) Lists

Update your attendee lists and upload them into your SRT/committee folder. CSE's Research team will begin merging them and adding additional participants to the Thrive Engagement Map. Work with your CSE Point of Contact if support is needed.