

# Center for Sustainable Energy (CSE)

## Outreach and Engagement

### Methodology

<b>Outreach and Engagement Objectives and Roles</b>	<b>1</b>
Outreach committees	2
Subregional tables	2
CSE	3
Convener team	4
<b>Support for Outreach and Engagement Plans</b>	<b>6</b>
<b>Community Insight Timeline and Topics</b>	<b>7</b>
<b>Data Collection Methods and Policies</b>	<b>8</b>
Meeting and Event Support	8
Survey Tools	9
Community Insights Data Collection Approach at Events and Meetings	9
Accessibility and Transparency Policies	9
<b>Analysis and Summarization Methods</b>	<b>11</b>
Analysis	11
Summarization of Key Findings	11
Thrive Inland SoCal Engagement Map	12
<b>Database Management and Planning Documents</b>	<b>12</b>
Information Management	12
Tools & Templates	13

## Outreach and Engagement Objectives and Roles

Primary objectives of Thrive Inland SoCal Outreach and Engagement outreach committees and subregional tables:

- 1) Created a structure for networking and collectively pursued regional projects that support the creation of and access to living wage jobs in sectors that are contributing to regional sustainability. SRTs and committee members generate new networks with organizations across affinity groups, sectors, and areas of strength.
- 2) Gathered feedback from 13 [affinity groups](#) – 12 designated by the state + 1 designated by Thrive Inland SoCal (youth) – to help create a regional plan that will foster sustainable economic growth in the region.

Each of the 6 subregional tables (1) appointed a “backbone organization” that gathered feedback from their subregions across the 13 affinity groups, and (2) elected a chair that advised the subregional table and served as a representative voting member of the Inclusive Planning Council (IPC). In Fall 2023, before most subregional tables were operational, the two outreach committees - the Community Engagement, Arts & Culture Committee and the Business and Community Leaders Outreach Committee - held events to gather input from the broader community and the business community, respectively. The convener team and CSE provided support to the outreach committees and the SRTs to coordinate events, feedback gathering, and participant reimbursement. The following description briefly explains each group’s role and key activities in outreach and engagement efforts:

## Outreach committees

- Role:
  - Explained and promoted Thrive Inland SoCal to the broader community
  - Solicited feedback to inform regional economic development plan
- Key activities:
  - Held monthly meetings between July 2023 and September 2024.
  - Held four events with different target audiences in different locations between August 2023 - December 2024.

## Subregional tables

- Role:
  - Explained and promoted Thrive Inland SoCal to the broader community
  - Formed subregional planning and networking groups that are positioned to develop collaborative projects that can be funded by CA Jobs First and additional sources of funding
  - Solicited feedback to inform regional economic development plan
- Key activities:
  - Formed and held elections between October 2023 - January 2024
  - Drafted and revised engagement plans between December 2023 - March 2024
  - Held a total of 35 events between October 2023 - August, 2024 that achieved a combined goal of increasing awareness about Thrive Inland SoCal and California Jobs First, providing networking opportunities, and gathering feedback for the economic development plan
  - Solicited responses to a community insights survey, Capacity for Action inventory of organizations positioned to support economic development strategies, and a list of organizations and individuals to be included in the Thrive Inland SoCal Engagement Map

# CSE

## Role:

- Support Thrive Inland SoCal outreach and engagement work conducted by Outreach Committees and SRTs
- Maintain database of information to support coordination across SRTs, outreach committees, convener team, and research teams

## Key activities:

- Advisory role in creating a cohesive outreach plan across the backbone organizations and committees which included:
  - Hosted bi-weekly calls to coordinate on outreach plans across the 6 sub-regional tables, outreach committees, and research teams
  - Provided an outreach template, and shared feedback on outreach plans
- Support role for the committees and backbone organizations to assist, as needed, with event outreach and facilitation which included:
  - Prepared meeting agendas
  - Prepared presentations
  - Created community surveys and feedback forms
  - Attended outreach committee and SRT meetings, assisting with facilitation, taking meeting notes, set-up and tear-down
  - Outreach to additional organizations in the subregions
- End-to-end research and data management role to create a single repository that hosted planning tools, notes, summaries, and background research, which included:
  - Gathering, analyzing, summarizing, and maintaining feedback collected through the events.
  - Coordination with Data Committee Chair and Research Leads to ensure that community input aligned with research team needs, was included in the draft regional summary report, and was represented in the draft and final regional plan.
  - Creation and maintenance of a Google Drive accessible to SRT and outreach committee leadership, conveners, and research teams for engagement planning tools, agendas, data collection tools, repository and tracking of feedback gathered from events, summaries of events, and other materials
- Development of the [Thrive Inland SoCal Engagement Map](#) for geospatially documenting organizations and individuals who contributed to the Thrive Inland SoCal economic development planning process and which affinity groups they represent. The Tableau map included:
  - Self-described organization name or individual name
  - The geographic location of participants' organizations or a public location near participants' personal residence.
  - Self-described affinity groups they or their organizations represent or work with. .

# Convener team

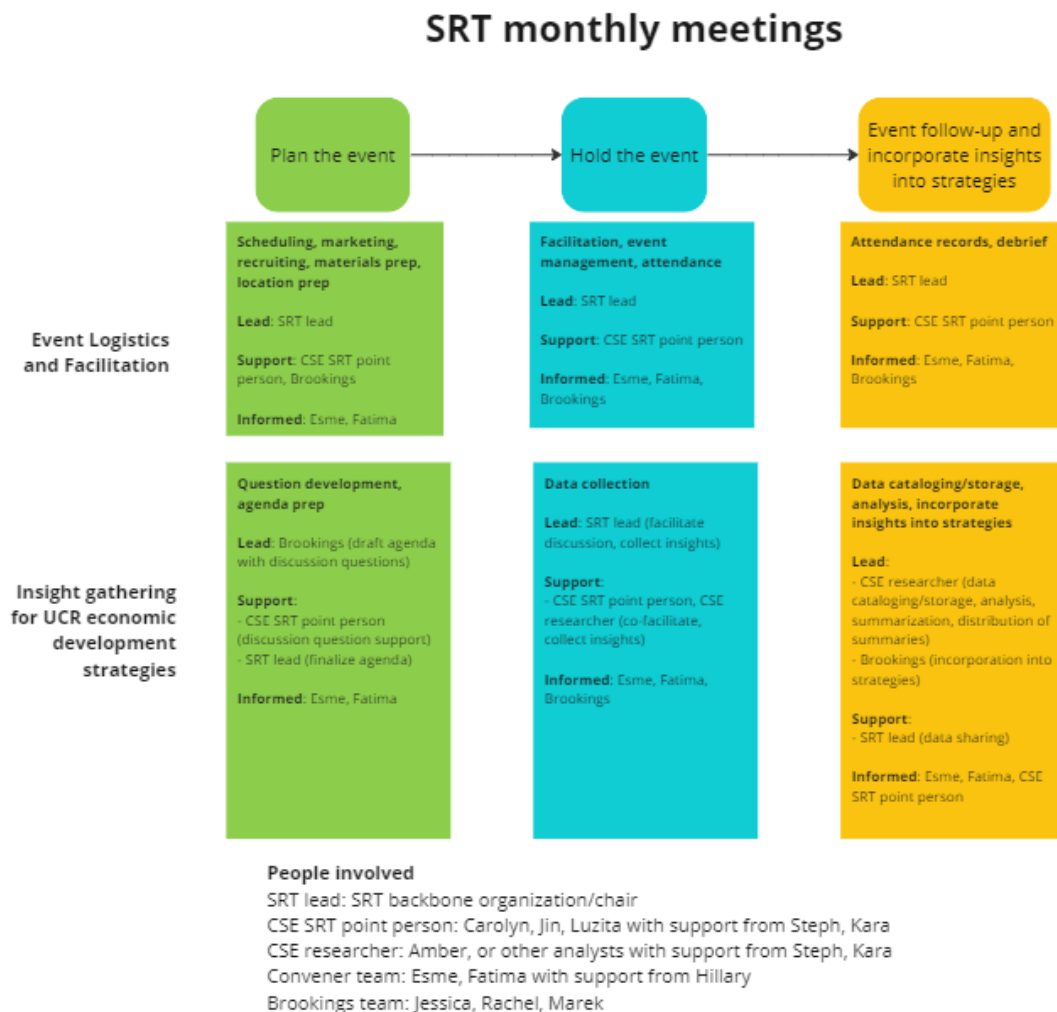
Role:

- Administered CA Jobs First grant

Key activities:

- Administered SRT and other individual contributor contracts
- Administered participant reimbursement for events
- Provided outreach and engagement support for SRTs and committees including support with event planning, engagement plan review, meeting facilitation

Figure 1: Thrive Inland SoCal Outreach and Engagement Roles and Responsibilities



## Additional events beyond SRT monthly meetings:

SRT backbone organization-hosted events, events that have SRT backbone organizations on their agenda to do a feedback session,



### People involved

SRT lead: SRT backbone organization/chair

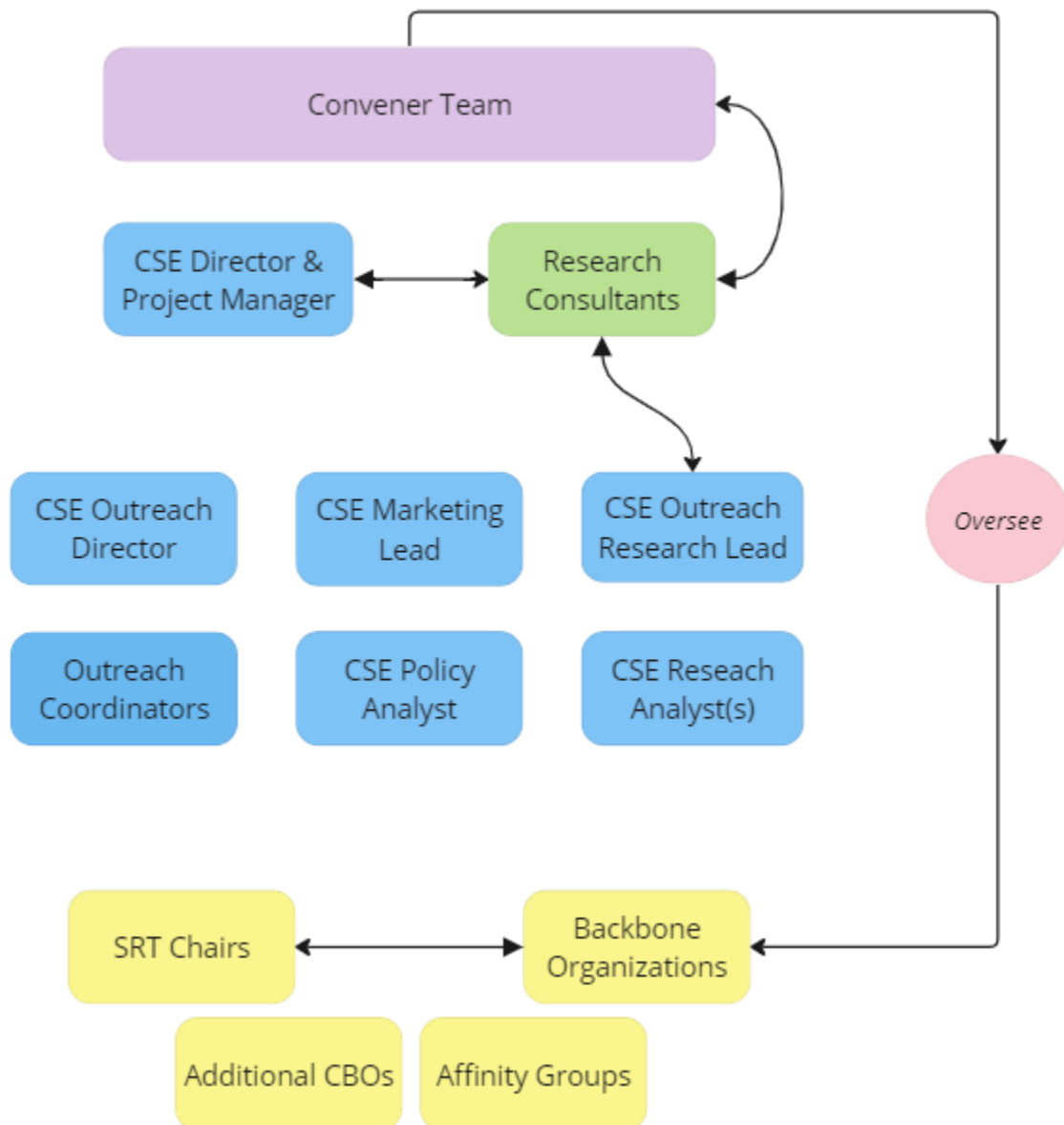
CSE SRT point person: Carolyn, Jin, Luzita with support from Steph, Kara

CSE researcher: Amber, or other analysts with support from Steph, Kara

Convener team: Esme, Fatima with support from Hillary

UCR team: Marissa, Beth

**Figure 2: CSE Roles & Lines of Communication**



## Support for Outreach and Engagement Plans

Three phases of feedback for the regional plan development occurred between October 2023 – August 2024:

- Regional summary report development - August - December 31, 2023
- Identification of key industries, discussion of job-related barriers and solutions, and feedback on strategy approach between January 2024 - May 2024
- Strategy development draft and final report - before August 31, 2024

## Community Insight Timeline and Topics

Outreach committees and SRTs collaborated with the research teams to host events at which they could gather community input on key topics, including defining a "quality job," barriers and solutions related to accessing quality jobs, identifying organizations that are assets in the region, reviewing strategies, and identifying climate/environment/energy issues and public health issues that should be considered when developing economic development strategies.

The conveners and research teams advised the outreach committees and SRTs on topics they could address with their event participants that would help inform the economic development plan. The research teams worked with the outreach committees and SRTs to draft specific questions to field with community members during each phase of engagement. The responses to these questions helped inform the economic development strategies, ensuring that community voices were integrated into the decision-making process.

In Fall 2023, the research team defined the topics for three phases of gathering insights as:

- 1) August - December 2023, completed by Business and Community Leaders and Community Engagement, Art & Culture Committees:
  - a) How is a good job/quality job defined?
  - b) What are important climate, health, and community issues in our region?
- 2) January-March 2024, to be completed by subregional tables:
  - a) What employment sectors and projects should our community invest in the next 5-10 years?
  - b) What projects can our community advocate for to address what our communities are asking for?
- 3) April-May 2024, to be completed by subregional tables:
  - a) Feedback on project plans

However, with revised guidance and timelines from the state in January and February, the research team revised the plan for gathering feedback from the community, and the final schedule of outreach and engagement topics included:

- August - December 2023, completed by Business and Community Leaders and Community Engagement, Art & Culture Committees:
  - How is a good job/quality job defined?
  - What are important climate, health, and community issues in our region?
- January - March 2024, completed by subregional tables:
  - What barriers get in the way of obtaining a quality job?

- What are the solutions needed to address these barriers? Where should we invest more resources?
  - What existing resources successfully address barriers (with emphasis on supporting historically disinvested communities)?
- April 2024, completed by subregional tables:
  - Reviewed draft strategies and considered the public health, climate, and environmental concerns related to the draft strategies within the subregions.
  - Continued to identify existing efforts and organizations that address concerns, and actions / investments needed (with emphasis on historically disinvested communities)
- May 2024, completed by subregional tables:
  - Reviewed and discussed revised strategies and provided feedback on draft implementation plan and performance metrics
- June 2024, completed by subregional tables:
  - Reviewed and discussed draft regional plan

## Data Collection Methods and Policies

The Center for Sustainable Energy (CSE) Outreach & Engagement (O&E) Team provided support to SRTs and committees in community insights collection planning, processes, summarization, and archiving. The tools used for gathering community insights can be found [here](#).

## Meeting and Event Support

### Online Events and Meetings

- SRTs and committees collaborated with CSE O&E Team to provide online slide(s) in meetings and events that described community insights collection goals, purpose, method of collection, community sharing, and feedback
- SRTs and committees worked with CSE O&E Team to identify roles and responsibilities with regard to community insights collection coordination, moderating, note taking, creation of online slides, etc.
- CSE O&E Team collaborated with SRTs and committees to document online meeting programs, panels/talks, and/or insights collection.
- SRTs and committees collaborated with CSE O&E Team to provide online tools to assist in gathering community insights
- CSE O&E Team collaborated with SRTs, committees, and the research team to evaluate community insights questions and accessibility, and CSE O&E Team provided SRTs, committees, and community feedback to the research team



- SRTs and committees collaborated with CSE O&E Team to identify organizations that are assets in the region using online tools and/or with the support of note takers
- SRTs collaborated with CSE O&E Team to identify reviewer groups across SRTs, to establish discrete meetings, and to gather community feedback specific to draft strategies for the regional plan in established online meetings.
- Translation and Interpretation – SRTs and committees provided slides and written materials translated into Spanish and provided live interpretation or a Zoom translation plug-in for online events and meetings.
- SRTs and committees established video recording consent and minor engagement protocols prior to online events.

### In-person Events and Meetings

- SRTs and committees collaborated with CSE O&E Team to provide slide(s) or paper copies in meetings and events that described community insights collection goals, purpose, method of collection, community sharing, and feedback.
- SRTs and committees worked with CSE O&E Team to identify roles and responsibilities with regard to community insights collection coordination, moderating, note taking, creation of slides, and paper copies, etc.
- CSE O&E Team collaborated with SRTs and committees to document meeting programs, panels/talks, and/or insights collection.
- SRTs and committees collaborated with CSE O&E Team to provide online or paper tools to assist in gathering community insights
- CSE O&E Team collaborated with SRTs, committees, and the research team to evaluate community insights questions and accessibility, and CSE O&E Team provided SRTs, committees, and community feedback to the research team
- SRTs and committees collaborated with CSE O&E Team to identify organizations that are assets in the region using survey and other tools and/or with the support of note takers
- SRTs collaborated with CSE O&E Team to identify reviewer groups across SRTs, to establish discrete meetings, and to gather community insights specific to draft strategies for the regional plan in established in-person meetings.
- Translation and Interpretation – SRTs and committees provided a process and timeline for written materials translated into Spanish and provide live interpretation for in-person events and meetings.
- SRTs and committees established videorecording consent and protocols prior to online events.

### Survey Tools

- CSE collaborated with the research team, conveners, and SRTs to create a Community Insights Survey that gathered feedback on participants, their organizations, and their

insight into barriers, solutions, and organizations that are successful in addressing issues related to finding and keeping a quality job.

- The Community Insights Survey was available for use from February 15 through April 15, 2024. SRTs collected over 400 responses from community members at their monthly SRT meetings and outreach events in the region. The CSE research team conducted a qualitative analysis by question coding for themes on economic barriers and solutions from each subregion and summarized the findings in a survey report.
- SRTs and committees collaborated with the CSE O&E Team to create and administer a survey for collecting data on meeting attendance, engagement, and affinity group designation.

## Community Insights Data Collection Approach at Events and Meetings

- Goal Setting – CSE O&E Team collaborated with SRTs and committees to set goals and central questions for community insights collection, and defined the purpose, timeline, and specific targets for reaching affinity groups and individual members.
- Community Insights Collection – CSE O&E Team collaborated with SRTs and committee to establish clear methods, roles, and responsibilities for collecting community insights during events and meetings, and assigned specific roles such as Points of Contact, event activity facilitators, and notetakers.
- Translation and Interpretation – SRTs and committees coordinated with the CSE O&E Team to translate written materials into Spanish, and provided live interpretation as needed.
- Consent – CSE O&E Team collaborated with SRTs and committees to establish protocols for obtaining community consent with regard to photo/videorecording and minor youth engagement.
- Addressing Gaps – SRTs and committees met regularly with the CSE O&E Team to identify gaps in community insights collection, and brainstorm new methods in the collection process.
- Feedback Loop - SRTs and committees provided regular feedback in established bi-weekly meetings on the community insights collection process to the CSE O&E Team and the research team.

## Accessibility and Transparency Policies

- Transparency – All community insights from meetings and events were archived in SRT folders to include a “Raw Notes” folder that contains unedited community insights uploaded directly from events and meetings and a “Summaries” folder that contains brief summarized community insights and themes from raw notes.
- Accessibility – All community insights folders were made available through an online public link to an easy-to-use Google site geared to community use.

- Translation and Interpretation – All community insights collection materials were ideally provided in Spanish. SRT folders include a “Translated Summaries” folder that contains summarized community insights and themes from raw notes translated into Spanish.
- Privacy and Security – All community insights archived in SRT folders were anonymized with personal identifiers removed to protect the privacy of individuals. SRTs and committees worked with CSE O&E Team to provide guidance and processes to protect minor youth engaged in community insights collection. That said, CSE did not promise confidentiality or anonymity due to the highly interactive and transparent data collection and communication approach taken for this work.
  - Language for survey that does not insinuate full confidentiality, but offered some level of privacy related to reporting findings: “Your responses to these questions will be aggregated with others’ responses when reported to the Thrive community and any quotes used in summaries or reports will not be attributed to specific individuals.”
- Data Sovereignty – Thrive Inland SoCal will collectively determine how community insights might be used and archived outside Thrive Inland SoCal work after September 30, 2024. All community insights by tribal communities will be delivered to tribes unless otherwise indicated after September 30, 2024.
- Community Review & Feedback – Community members who contributed insights were able to review summaries to ensure that summaries accurately reflected their ideas and what was recorded in the raw notes. Community members who wished to review comments used the following process:
  - Community Insights Comment Process
    - The CSE O&E Team provided summaries from “raw notes.”
    - When summaries were uploaded into folders, SRTs and committees were notified via email.
    - SRTs and committees were responsible for ensuring event participants were alerted to provide comments. The summaries were available as “comment only.”
    - Event and meeting participants provided comments on the summaries for clarification, context, and any other adjustments.
    - The CSE O&E Team adjusted summaries based on feedback, asked questions as needed, and resolved comments once the summary was updated.
  - Community Insights Corrections/Edits Process
    - Community members who contributed insights and wished to see a correction of their comments could request changes in comments.
    - Community members who contributed insights, preferred to remain anonymous, and wished to see a correction of their comments were able to email the CSE O&E Team or point person for handling corrections.

# Analysis and Summarization Methods

CSE researchers conducted analysis of SRT meeting and event notes, survey responses, and interview transcripts using [Dovetail software](#), allowing several researchers to collaborate on coding responses and identifying themes. CSE researchers created summaries of key findings in Dovetail and then saved the summaries in (1) the SRT Google Drive so that SRTs and committee leads could share them with their members, and (2) the Research team Google Drive so that the research team could refer to them while developing strategies for the economic development plan.

## Analysis

CSE researchers analyzed insights from following this general approach:

- Data Cleaning —Uploaded surveys, notes, and summaries to Dovetail, checked for accuracy and transcribed if needed, addressing only errors that affect meaning, and coded data for questions and themes.
- Question Coding —Tagged responses with questions specific to each event.
- Non-Response Coding —Tagged non-responses with a 'Non-Response' tag.
- Thematic Coding:
  - In-scope themes provided by Brookings Institution/Cities GPS included: Career Pathways, Childcare Access, Education & Training Access, Transportation Access, Employer-Supported Housing, Entrepreneurship, Building Cultural & Social Capital, Technology Access.
  - Out-of-scope themes were those not fitting into the above categories.
- Quality Control —CSE researchers conducted QC before analysis and summary writing to ensure accuracy and consistency.

## Summarization of Key Findings

CSE researchers summarize and report findings from the analysis of surveys, interviews, and focus groups with in-scope strategic themes provided and informed by Brookings Institution/Cities GPS. CSE researchers compile and report on the following themes.

- Career Pathways
- Transportation Access
- Employer-Supported Housing
- Education and Training Access
- Entrepreneurship
- Building Cultural and Social Capital
- Childcare Access

These themes have been defined as what is in-scope however out-of-scope themes are recorded on an as needed basis to support the in-scope research analysis.

CSE also developed a list of organizations that people who responded to the survey consider regional assets. Business names and acronyms were compiled from open-ended survey responses and vetted through publicly available online resources such as company websites and Google Business Listings. Location information including area served and primary operating addresses were compiled when possible. Only organizations with a physical operating location within the Inland Empire were compiled into the regional asset list.

## Thrive Inland SoCal Engagement Map

The [Thrive Inland SoCal Engagement Map](#) was initially developed to partially meet the asset mapping requirements of the interim research report due in December. The first draft of the map included a map of organizations participating in Thrive Inland SoCal as of early December 2023. The updated map was launched on May 31, 2024 with lists of organizations and individuals that self-selected to be named and included on the map, including any affinity groups they represent or belong to. The map also includes filters to highlight disadvantaged and lower to moderate income communities in the region. As of the publication of this document, the map was last updated on May 31, 2024 with additional updates and enhancements to be made.

## Database Management and Planning Documents

### Information Management

Google Drive was chosen as a secure yet accessible option to store information that must be used by external partners. The Thrive Subregional [Google Drive](#) holds all information that needs to be shared with the conveners and sub-regional tables. This includes templates, helpful resources for planning outreach and engagement, surveys, finalized meeting summaries, etc.

Information stored in Google Drive

- Individual SRT / Committee Folder
- Tools & Templates (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

The [Thrive Inland SoCal website](#) serves as a homepage for regional public information. Information regarding meetings, committees, equity council, sub-regional tables, and contacts can be found here.

In addition to the above resources, CSE created a [Google Site](#) with the intention that it will act as a central location for links to folders, summaries, templates, guidance, Thrive website, etc. The site provides communities with access to summaries of community insights for feedback and reference. It is monitored for accessibility and directions are included for Spanish translation.

Note that CSE also maintained a separate Google Drive for research teams to post data and reports, and supported uploading of reports and documents from the research drive to the Thrive Subregional Google Drive for SRT review.

## Tools & Templates

The below [tools and templates](#) have been created by CSE for use by the sub-regional tables during events and meetings.

- Event Note Taking Template
- Event Planning Toolkit
  - The Event Planning toolkit was created to support the SRT's event participation efforts. The toolkit guides SRTs on how to host and participate in regional events. This resource includes but is not limited to areas to target, event coordination templates, required materials for events and presentations, and insurance considerations. CSE proactively provides support to review agendas, provide feedback and push for affinity group engagement.
- Outreach and Engagement Plan Template
  - In support of the outreach plan, CSE has created an [Outreach & Engagement Plan Template](#), to help with gathering community insights through various methods (e.g., group activity, survey, interview), and summarize and share community insights and SRTs and committees for transparency and feedback. In addition, CSE provides guidance on any outreach gaps/opportunities.
- SRT Meeting Note Template
- Thrive Inland SoCal Plan Template
- Thrive Inland SoCal Online Event Plan Template
- Tools for Gathering Insights