

Center for Sustainable Energy (CSE)

Outreach and Engagement

Methodology

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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 was (1) appointed a “backbone organization” that was responsible for gathering 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 - December 2023 and
 - 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:

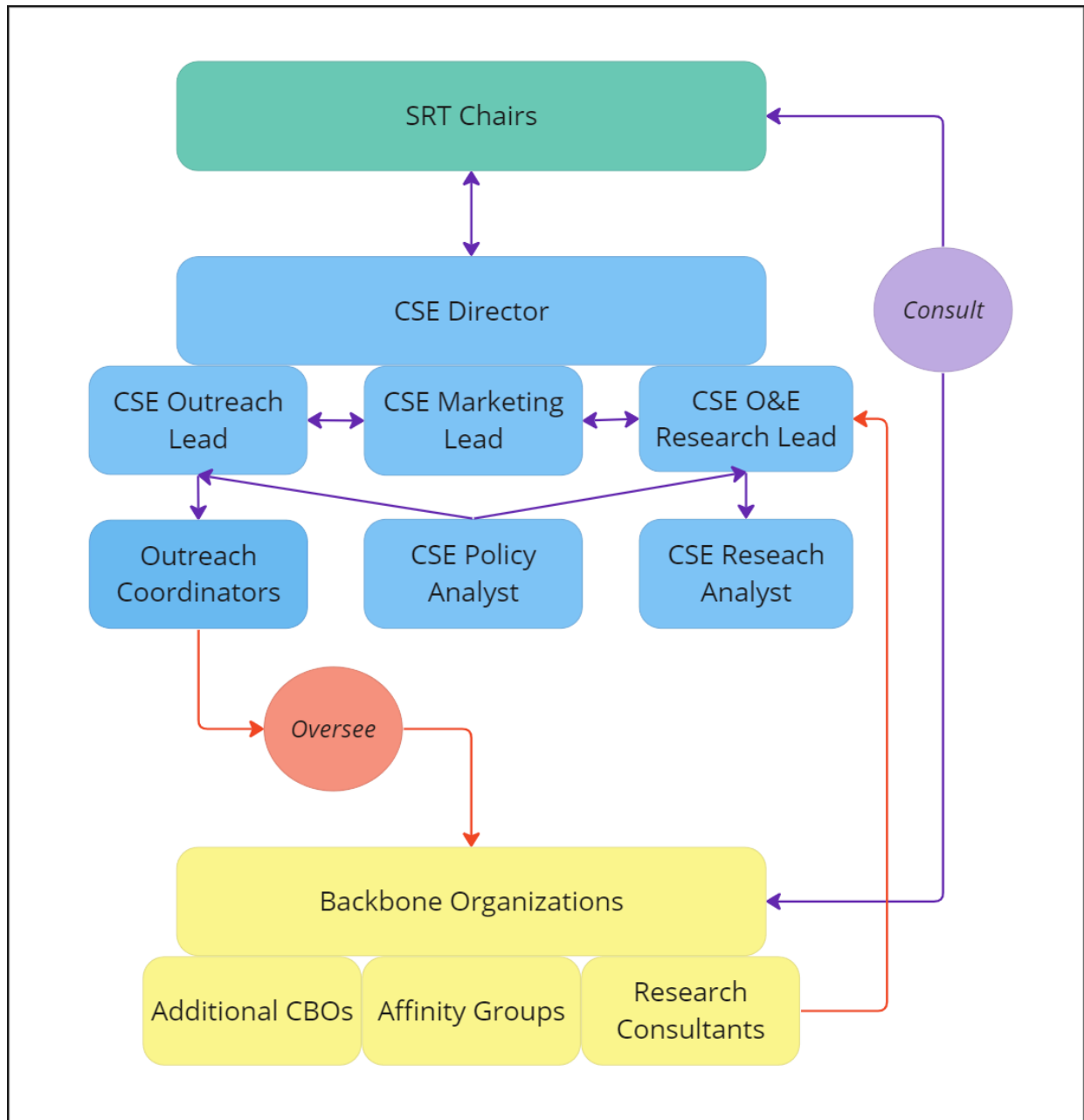
- Administer CA Jobs First grant

Key activities:

- Administer 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 #: Thrive Inland SoCal Outreach and Engagement Roles and Responsibilities

Figure #: 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 - March 2024
- Strategy development and draft and final report - March - August/June before May 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?
- February - 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 will collaborate with CSE O&E Team to provide online slide(s) in meetings and events that describe community insights collection goals, purpose, method of collection, community sharing, and feedback.
- SRTs and committees will work 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.
- Translation and Interpretation – SRTs and committees will strive to provide slides and written materials translated into Spanish and to provide live interpretation or a Zoom translation plug-in for online events and meetings.

- SRTs and committees will establish video recording consent and protocols prior to online events.

In-person Events and Meetings:

- SRTs and committees will collaborate with CSE O&E Team to provide slide(s) or paper copies in meetings and events that describe community insights collection goals, purpose, method of collection, community sharing, and feedback.
- SRTs and committees will work 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.
- Translation and Interpretation – SRTs and committees will strive to provide a process and timeline for written materials translated into Spanish and provide live interpretation for in-person events and meetings.
- SRTs and committees will establish 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 survey...

Community Insights Data Collection Approach at Events and Meetings

- Community Insights Collection Goal Setting
 - Goals and Purpose of Community Insights Collection – SRTs and committees will collaborate with CSE Researchers and respond to Data Committee needs to set and communicate goals, central questions, and themes for community insights collection at events and meetings. This includes defining the purpose, timeline, and specific targets for including and reaching affinity groups and individual members.
- Community Insights Collection – SRTs and committees will collaborate with CSE researchers to establish clear methods, roles, and responsibilities for collecting community insights during events and meetings (e.g., surveys, interviews, focus groups) for Phase 2 and 3, with specific roles assigned (e.g., Point of Contact, event activity facilitator, notetaker).
- Translation and Interpretation – SRTs and committees will work with CSE O&E Team to establish process and timeline for written materials translated into Spanish and live interpretation.

- Consent – SRTs and committees will collaborate with CSE O&E Team to establish protocols for community consent with regard to photo/videorecording and minor youth engagement.
- Addressing Gaps in Collection of Community Insights – SRTs and committees will meet regularly with CSE O&E Team to identify gaps in community insights collection and to brainstorm collection methods.

Accessibility and Transparency Policies

- Transparency – All community insights from meetings and events will be 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 will be 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 will ideally be provided in Spanish. SRT folders will 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 will be anonymized with personal identifiers removed to protect the privacy of individuals. SRTs and committees will work with CSE O&E Team to provide guidance and process that protects minor youth engaged in community insights collection. That said, CSE will 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 offers 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 July 1, 2024. All community insights by tribal communities will be delivered to tribes unless otherwise indicated after July 1, 2024.
- Community Review & Feedback – Community members who have contributed insights may review summaries to ensure that summaries accurately reflect their ideas and what was recorded in the raw notes. Community members who wish to review may provide comments as follows:
 - Community Insights Comment Process
 - The CSE O&E Team will provide summaries from “raw notes.”
 - When summaries are uploaded into folders, SRTs and committees will be notified via email.

- SRTs and committees are responsible for ensuring event participants are alerted to provide comments. The summaries are available as “comment only.”
- Event and meeting participants will provide comments on the summaries for clarification, context, and any other adjustments.
- The CSE O&E Team will adjust summaries based on feedback, ask questions as needed, and resolve comments once the summary has been updated.
- Community Insights Corrections/Edits Process
 - Community members who have contributed insights and wish to see a correction of their comments may request changes in comments.
 - Community members who have contributed insights, prefer to remain anonymous, and wish to see a correction of their comments will email the CSE O&E Team at: ? = 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:

- 1) Data cleaning
- 2) Question coding and transcript cleaning - ...
 - a) Non-response coding ...
- 3) Thematic coding - ...
- 4) QC ...

Each event is its own ‘project’ in Dovetail, within the ‘project’, the event’s data is uploaded to the ‘notes’ section. The data or notes are transcribed if needed and checked for accuracy, only addressing errors that affect meaning. Notes are then coded for questions and themes. The purpose is to categorize each response with its respective question tag, and mentions from the data as either barriers or solutions across various themes.

- Question Coding:
 - A tag board with questions from the specific event is created within the 'project' and is only available locally.
 - In the tag definition, the question is listed verbatim.
- Thematic Coding:
 - For In-Scope themes (themes provided by Brookings), two global (available to all events) tag boards, one titled Barriers, the other titled Solutions are created.
 - Each tag board includes the following in-scope themes: Career Pathways, Childcare Access, Education & Training Access, Transportation Access, Employer-Supported Housing, Entrepreneurship, Building Cultural & Social Capital, Technology Access.
 - The coder will review the data in the 'notes' section from each event and identify mentions related to the specified themes. Based on the context, the coder will categorize the mention as either a Barriers or a Solution, and tag it accordingly.
 - For Out of Scope themes three tag boards are created; Barriers & Needs, Solutions to Barriers, and Demographics.
 - The coder will add themes and their description as needed if mentions do not fit within the In-Scope themes.
- Non-Responses Coding (for surveys and written responses):
 - If no response is provided, the coder will write '[blank]' and code this text with the corresponding question tag and the 'Non-Response' tag.
 - If the respondent wrote 'N/A', 'Unsure', 'I don't know', or any variant, the coder will tag the text with its corresponding question tag and the 'Not Sure/NA' tag.
 - Upon the coder's discretion, if the respondent did not seem to understand the question or the response is unrelated to the question but could possibly be of value, the response is tagged with 'Didn't Understand Question/Unrelated' tag.

Team QC's coding before analysis and summary writing to ensure accuracy and consistency. Summaries:

- For each question-level tag and each theme tag, review the coded text to identify subthemes for that question/theme tag.
- Create a frequency table for the number of interviews that mentioned a particular subtheme.
- Write a narrative paragraph that specifies
 1. the total number of interviews that addressed the question or theme.
 - e.g., Out of 10 interviews, 8 talked about the theme.
 2. the proportion of interviews that addressed a particular subtheme, and a summary of what the subtheme is, how it is related to the theme, why it matters, and to what extent it matters

- Out of the 8 interviews, 6 mentioned X subtheme and said it was important because it affects ABC issues.... while 4 mentioned Y subtheme stating that it helps exemplify why ABC issues are important to their work.
 - include verbatim quotes that show the context in which X and Y subthemes occur or when they matter to the theme
- 3. conclude with a summary statement about the potential implications of what the interviews described and how that information should relate to the theme.
 - Given that interviews showed that X and Y subthemes could influence what happens with ABC issues, it is worth considering the impact on DEF, as well.
- Create a list of questions and observations for future analysis that surfaced as during analysis. This list of questions or observations may be important to the research team or future researchers. Examples:
 - "Does XYZ finding make sense given what we know about the region?"
 - "Would it make sense to explore this theme further with future interviewees to see if they can explain why XYZ is a concern?"
 - "We noted X topic that we are not familiar with. We noted that interviews mention it in Y context. Does this matter?"
- Quality Control (QC)
 1. QC the summary against the frequency table counts, and double check the description of interpretation is within the bounds of what the interviewees actually said; do not include personal opinion or exaggerate the relative importance of the finding.

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 Institute research. 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. The steps taken to compile the list included:

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 [DATE] with lists of organizations and individuals and 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 for As of the publication of this document, the map was last updated on [date].

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 [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.

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