

BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA



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Order Instituting Rulemaking
Concerning Energy Efficiency Rolling
Portfolios, Policies, Programs, Evaluation,
and Related Issues

Rulemaking 13-11-005
(Filed on November 14, 2013)

**SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK'S (CPUC #940)
MOTION SEEKING AUTHORIZATION FOR THE COMPENSATION PILOT
PRESENTED IN THE CALIFORNIA ENERGY EFFICIENCY COORDINATING
COMMITTEE COMPENSATION TASK FORCE FINAL REPORT**

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For The Southern California Regional Energy
Network

November 29, 2022

I. INTRODUCTION

Pursuant to Rule 11.1(b) of the California Public Utilities Commission’s (“CPUC,” “the Commission”) Rules of Practice and Procedure, the Southern California Regional Energy Network (“SoCalREN”) submits this Motion, on behalf of the California Energy Efficiency Coordinating Committee (CAEECC) Compensation Task Force, seeking Administrative Law Judge (ALJ) authorization to use unspent energy efficiency (EE) funds for the CAEECC Compensation Pilot. Attached as context is the CAEECC Compensation Task Force Final Report. CAEECC anticipates implementing the Pilot as generally described in the attached Report, though is not seeking authorization or approval from the Commission for the Report or the specific Pilot operational details it contains. CAEECC provides a venue for stakeholders to discuss market-rate energy efficiency matters under the purview of the Commission. SoCalREN is a member of CAEECC and the Compensation Task Force.

II. BACKGROUND

In late 2021, a number of changes related to ongoing transitions in the California EE landscape warranted careful consideration of the CAEECC Membership and its implications on inclusion, equity, and diversity. There were many changes for the CAEECC to consider, for instance, the launch¹ of the new Equity and Market Support segments—and relatedly, rising energy burden, disproportionate impacts of COVID-19 on low-income communities and communities of color, and other inequities in EE (such as lack of decision-making opportunity) that also intersect with economic and racial inequities. From this review, the CAEECC formed the Composition, Diversity, Equity, and Inclusion Working Group (CDEI WG).

Originally, the focus of the CDEI WG was solely on membership composition. However, considering the goals of the CPUC’s Environmental and Social Justice (ESJ) Action Plan,² the scope expanded to include a pathway for marginalized people and communities to participate in CAEECC activities and have a voice in the future of EE programs in California.

¹ In [D. 21-05-031](#), the Commission directed Program Administrators (PAs) to “further segment their portfolios based on the primary program purpose, into the following three segments: Resource Acquisition, Market Support, and Equity.”

² [CPUC ESJ Action Plan](#)

In addition, the Assigned Commissioner’s Scoping Memo and Ruling issued in the A.22-02-005 2024-2031 Business Plan proceeding on June 24, 2022 expanded on this concern to include, in scope Question 7, “What additional guidance, if any, is needed to better align portfolios and programs with the Environmental and Social Justice Action Plan? This issue may include consideration of the California Energy Efficiency Coordinating Committee (CAEECC) purpose, governance structure, and membership.”³

Subsequently, the CDEI WG was tasked with exploring different aspects of diversity in CAEECC membership including but not limited to racial, cultural, ethnic, abilities, gender, economic, religious, and generational diversity. The focus of this work was to identify greater impact and stronger and more equitable outcomes in CAEECC’s EE work. Historically, the representation of CAEECC Member organizations has been more homogeneous than representative of the diverse communities of California.

III. DESCRIPTION OF THE COMPENSATION TASK FORCE AND REPORT

In April 2022, the CAEECC CDEI WG convened interested stakeholders and members to form the Compensation Task Force (COMP TF, or Task Force) to explore a pilot compensation process the successor CAEECC working group (tentatively named “Evolving CAEECC Working Group”)⁴ that will take up further consideration of CAEECC’s role and capacity to advance more equitable EE program implementation.

The Task Force set out to develop the framework and scope for a Compensation Pilot 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.⁵

³ A.22-02-005 Assigned Commissioner’s Scoping Memo and Ruling, issued June 24, 2022. page 4.

⁴ *The Evolving CAEECC Working Group* is the working name for the envisioned Working Group formerly referred to as the JEDI-focused Working Group as described in the Compensation Task Force Final Report.

⁵ “Historically underrepresented” includes, but is not limited to, the CPUC ESJ Communities definition, Disabled populations and those living with access and functional needs, LGBTQIA+, Immigrant and undocumented, low-to-

Over the course of a five-month period in 2022, the Task Force met four times and developed consensus-based recommendations for the Compensation Pilot. This effort resulted in the Compensation Task Force Final Report, which includes recommendations for eligibility criteria, funding sources, recruitment strategy, and a Pilot review process (included as an attachment to this Motion).

The Task Force considered the use of philanthropic funding, new ratepayer funding, and the pending \$30 million in community engagement funds set for the CPUC in the state budget.⁶ Due to the longer timeline and/or uncertainty of these funds, they were deemed not ideal for the purposes of this Pilot, considering the timely need for a Pilot to be made available to future members of the Evolving CAEECC Working Group, which was originally intended to launch 2022 Q4. These other funding sources were recommended by the Task Force to be considered in the future for any subsequent compensation programs. The Task Force determined that using unspent EE Budget Funds would prevent additional administrative burden on stakeholders and present the most expeditious pathway to fund the proposed Pilot, which is now intended to launch in 2023 concurrent with the forthcoming Evolving CAEECC Working Group.

IV. ENERGY EFFICIENCY FUNDING AUTHORIZATION BACKGROUND

Commission guidance in D.15-10-028⁷ regarding the funding of the CAEECC facilitation contract states that the budget will be filed annually as a Tier 1 advice letter and the "budget should be the minimum needed to hire a facilitator and conduct meetings to cover the scope of work outlined above." After discussions, the investor-owned utilities (IOUs) and Energy Division staff agreed that the language was too narrowly focused to support the use of EE PA budget funds to compensate individuals or organizations to participate in CAEECC activities. Therefore, SoCalREN, on behalf of the Compensation Task Force, seeks ALJ authorization for the use of unspent EE funds to compensate participants⁸ who meet the eligibility requirements and whose

moderate income customers, Medical vulnerabilities, Unhoused individuals, and Indigenous populations living in non-federally designated communities.

⁶ [AB 179 \(2021-2022\)](#)

⁷ D.15-10-028, Ordering Paragraph 11, pages 125–126.

⁸ It is envisioned that individuals or organizations would be eligible participants.

participation would create a financial hardship in the absence of such compensation, to engage in the forthcoming Evolving CAEECC Working Group.

V. OVERVIEW OF THE PROPOSED COMPENSATION PILOT

The Final Report of the Compensation Task Force includes the results of the Task Force members' thoughtful deliberations and consensus recommendations around critical elements of the Pilot, including Principles, Intentions, and Eligibility Criteria; rationale behind the proposed Funding Source; Administration and Oversight; Recruitment Strategy; and Pilot Evaluation. These recommendations serve as the basis of implementing the Pilot, and the proposed Pilot Administrator is committed to continual input and advice from CAEECC, especially during, but not limited to, the Mid-Pilot Review, which will provide an interim assessment of the Pilot.

The Final Report of the Compensation Task Force is included as "Attachment A" to this Motion and is provided only as reference material. This Motion is not seeking Commission approval of this Report. It summarizes the findings and recommendations of the Task Force that were presented to CAEECC ahead of their authorization to submit this Motion for funding authorization. Its inclusion to this Motion does not constitute an endorsement by CAEECC members or stakeholders as a final implementation plan; CAEECC members expressed a desire to provide ongoing input throughout implementation of the Pilot.

VI. RELIEF REQUESTED

The purpose of this Motion is to request the Commission issue a disposition authorizing PAs⁹ to use unspent EE budget to fund the Compensation Pilot. The Motion seeks authorization for (PAs to collectively use up to \$185,000 of unspent EE Budget Funds for the Compensation Pilot. Authorized funds would be contributed to the PA selected as the contracting PA of the Compensation Pilot. They would in turn be responsible for the administration and oversight of these funds. Up to 15 percent of authorized Pilot funds may be allocated to the CAEECC Facilitation Team for administrative and program support activities.¹⁰

⁹ The investor-owned utilities (IOUs), Regional Energy Networks (RENs) and Marin Clean Energy (MCE).

¹⁰ The Task Force considered the conventional 10 percent administrative cap commonly used in EE programs. Considering the novel nature of the Pilot program and the broader scope of administrative and program support duties, the Task Force agreed a 15 percent administrative cap was more realistic.

The report commits the Facilitation Team as the Pilot Administrator to organize and support the outreach and recruitment process, application process and support, application review process, evaluation activities, as well as administering payments. These administrative and program support funds would cover any unknowns such as additional data requests/reporting requirements. As a piloted initiative, the typical 10 percent administration funding cap may be insufficient, due to initial pilot launch considerations and the fact that the facilitation's current budget does not include funding for such activities. The funding will be reevaluated on an on-going basis, and will be tracked, accrued, and invoiced as contractually required. As efficiencies in administration are gained, the administration costs will be reduced over time.

VII. CONCLUSION

SoCalREN would like to thank the Commission for its consideration of this motion and requests that the Commission expeditiously grant the relief requested herein. Granting this motion will help to support the Commission's Environmental and Social Justice Action Plan to make regulatory processes more diverse, inclusive, and equitable.

Respectfully submitted,

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The Pilot Administrator/Facilitation Team shall retain all documentation from the Pilot, provide updates regarding use of funds to the full CAEECC and Evolving CAEECC WG about the status of the Pilot, and conduct data collection and evaluations to provide a Mid-Pilot Report and Final Pilot Report. In addition, the Facilitation Team would be responsible for supporting the recruitment and application process, documentation of Pilot recipient eligibility, the amount and distribution of funds to recipients using an invoicing or other process, and the evaluation process.

SoCalREN's Motion Seeking Commission Authorization on CAEECC Compensation Task Force

ATTACHMENT A
Compensation Task Force Final Report

Compensation Task Force Final Report

A California Energy Efficiency Coordinating Committee Sub-group

November 21, 2022

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Executive Summary

The following document proposes recommendations to establish a pilot compensation program for historically underrepresented stakeholders to engage and participate in the upcoming Justice-, Equity-, Diversity-, and Inclusion-focused (JEDI-focused) Working Group (WG) of the California Energy Efficiency Coordinating Committee (CAEECC). The Compensation Task Force (Compensation TF, Task Force), a sub-committee of CAEECC, was tasked to develop these recommendations for the Compensation Pilot (Pilot). The purpose of this Task Force is based upon the work of the Composition, Diversity, Equity, and Inclusion (CDEI) WG and the vision within the California Public Utilities Commission (CPUC) Environmental and Social Justice (ESJ) Action Plan to create an accessible, accepting environment that better includes and considers the perspectives of underrepresented communities in the work of CAEECC.

Through a series of four meetings over five months, the Task Force developed these consensus-based recommendations to shape and launch the Compensation Pilot:

A. Principles, Intentions, Eligibility Criteria: The Task Force proposes a set of Principles, Intentions and Eligibility Criteria that identifies why, how, and for whom this Pilot is intended.

B. Funding Source, Amount, and Reimbursable Costs: The Task Force recommends the use of Energy Efficiency (EE) Budget Funds for the Compensation Pilot, and will seek authorization for the PAs (IOUs, RENs, and MCE) to collectively use up to \$185,000 of unspent EE Budget Funds for the Compensation Pilot.

C. Administration of Pilot:

C.1 Pilot Administration and Oversight: The Task Force recommends that administration and oversight of the Pilot be entrusted to the CAEECC Facilitation Team and Program Administrators, and outlines administrative and program support activities, oversight and decision-making responsibility, and establishes a budget cap for Pilot administrative costs.

C.2 Application for Compensation and Sample Application: The Task Force recommends that the Compensation Pilot application be integrated into the JEDI-focused WG Member Application to provide ease of use and simplicity. The Task Force offers a standalone example of an application.

C.3 Application Review Process: The Task Force recommends a cohort of volunteers from CAEECC, Compensation TF, and the CPUC ESJ Team work with the Facilitation Team to meet, review, and accept applicants to the Pilot on an ongoing batch-basis.

C.4 Distribution of Funds: The Task Force recommends that the Facilitation Team distributes funds to Pilot Recipients via a standard meeting/activity compensation amount and via an invoice with additional approved costs to be reimbursed.

D. Recruitment: The Task Force recommends implementation of a recruitment strategy once the funds are authorized for the Pilot, and that recruitment for the JEDI-focused WG be done concurrently.

E. Pilot Evaluation: The Task Force recognizes that evaluation of the Pilot will be necessary to measure success and determine if the Pilot can and should be replicated in other CAEECC and/or CPUC settings. This report recommends preliminary evaluation criteria, additional data, and data-not-to-be-measured to evaluate the objectives of the Pilot. The Pilot Administrator will conduct data collection and evaluation activities in support of a Mid-Pilot Report and Final Pilot Report.

Next Steps

This Task Force encourages CAEECC Members to adopt the recommendations as presented herein and support the filing of a Motion by SoCalREN (who volunteered to file the motion) to request the CPUC to authorize use of funds for the purposes of this Compensation Pilot. The Motion will also ask that subsequent requests for funds to be used for similar compensation purposes be made via an Advice Letter.

Introduction

This report summarizes the discussions and outcomes of the Compensation Task Force, a sub-committee within the California Energy Efficiency Coordinating Committee (CAEECC). The recommendations described herein are presented for Member review by CAEECC and will be the basis for a Motion for funding authorization by the CPUC.

Key definitions

- **California Public Utilities Commission's (CPUC, Commission):** The state agency regulating privately owned electric, natural gas, telecommunications, water, railroad, rail transit, and passenger transportation companies
- **California Energy Efficiency Coordinating Committee (CAEECC):** a CPUC-formed stakeholder group for the proceeding R.13-11-005.
- **Compensation Task Force (Compensation TF, Task Force):** the subcommittee of CAEECC that developed this report.
- **Compensation Pilot (Pilot):** a pilot to compensate future members of the JEDI-focused WG who identify as historically underrepresented in CAEECC.
- **Composition, Diversity, Equity, and Inclusion Working Group (CDEI WG):** a previous subcommittee of CAEECC that initially proposed a compensation model be available for all applicable CAEECC activities.

- **Energy Efficiency (EE) Budget Funds:** funds from Public Purpose Programs Charge (PPPC) Public Benefits Charge allocated for energy efficiency programs administered by the IOUs, RENs and MCE.
- **ESJ Community:** a California Public Utilities Commission’s (CPUC) defined term through the Environmental and Social Justice Action Plan (ESJ Action Plan).¹ It is the intent of the Compensation Task Force to use the most up-to-date and inclusive definition.
- **JEDI-focused WG²** (Justice-, Equity-, Diversity-, and Inclusion-focused): a future subcommittee of CAEECC that will focus on ways to bring justice, equity, diversity, and inclusion to all CAEECC systems and activities.
- **Pilot Administrator:** the entity that will implement the Pilot and its funding distribution process (distinct from EE Program Administrator).
- **Pilot Applicant:** an individual/organization who applies for the Compensation Pilot.
- **Pilot Recipient:** an individual/organization who is granted and awarded compensation through the Pilot.
- **Program Administrator/s (PA/s):** referring to the IOUs, RENs, and sole CCA, MCE, that administer energy efficiency programs.

“Environmental and Social Justice Communities” or “ESJ 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).

¹ About the [CPUC ESJ Action Plan](#): In accordance with the CPUC’s institutional values of accountability, excellence, integrity, open communication, and stewardship, the CPUC has created the ESJ Action Plan to serve as both a commitment to furthering ESJ principles, as well as an operating framework with which to integrate ESJ considerations throughout the agency’s work. “Environmental justice” means the fair treatment of people of all races, cultures, and incomes with respect to the development, adoption, implementation, and enforcement of environmental laws, regulations, and policies. Because the CPUC regulates utility services beyond those tied to the environment, the term “environmental and social justice” or “ESJ” has been adopted to capture a broader effort and potential population.

² The name of this Working Group is subject to change.

Note: the new version of CalEnviroScreen (4.0) will result in an updated definition of Disadvantaged Communities which will further expand the definition of ESJ Communities. The Compensation Task Force intends to use the most up-to-date and inclusive definition, and to the extent possible, consider all forms of underrepresentation, such as individuals with special Access and Functional Needs and other medical vulnerabilities.

Background

The Compensation Task Force (Compensation TF, Task Force) was created within an effort to diversify and create an inclusive community in the California Energy Efficiency Coordinating Committee (CAEECC). In April 2022, through the recommendation of the [Composition, Diversity, Equity, and Inclusion Working Group \(CDEI WG\)](#), CAEECC Members approved the establishment of a Task Force to further explore a compensation process, and pilot, for the future JEDI-focused Working Group.

In order to align with the California Public Utilities Commission’s (CPUC) Environmental and Social Justice Action Plan (ESJ Action Plan)³, CAEECC is seeking mechanisms to establish a more diverse, inclusive, and welcoming stakeholder group and process. Members of the previous CDEI WG identified the challenges to invite groups and individuals to participate who have historically been an underrepresented⁴ part of CAEECC. These challenges include the time-intensive nature of CAEECC’s activities and the lack of available staff capacity to engage. While the CDEI WG proposed in the CDEI WG Final Report (see [CDEI WG Webpage](#)) a model to compensate organizations or individuals who have been historically underrepresented throughout all CAEECC activities, CAEECC Members voted to pursue a Compensation Pilot for the

³ About the [CPUC ESJ Action Plan](#): In accordance with the CPUC’s institutional values of accountability, excellence, integrity, open communication, and stewardship, the CPUC has created the ESJ Action Plan to serve as both a commitment to furthering ESJ principles, as well as an operating framework with which to integrate ESJ considerations throughout the agency’s work. “Environmental justice” means the fair treatment of people of all races, cultures, and incomes with respect to the development, adoption, implementation, and enforcement of environmental laws, regulations, and policies. Because the CPUC regulates utility services beyond those tied to the environment, the term “environmental and social justice” or “ESJ” has been adopted to capture a broader effort and potential population.

⁴ ‘Historically underrepresented’ includes, but is not limited to, representatives of the following communities:

- CPUC ESJ Communities definition
- Disabled populations and those living with access and functional needs
- LGBTQIA+
- Immigrant and undocumented
- Receiving bill assistance like California Alternate Rates for Energy (CARE) or Family Electric Rate Assistance Program (FERA)
- Medical vulnerabilities
- Unhoused individuals
- Indigenous populations living in non-federally designated communities.

to-be-established JEDI-focused WG to test out the process. The Compensation TF is tasked with developing the scope of the Compensation Pilot that is expected to run over the course of the JEDI-focused WG, anticipated to be 6-8 work group meetings, and lasting no longer than one year. Moreover, the Task Force recognizes that compensation may be needed for key prospective stakeholders of the JEDI-focused WG to participate and engage in its activities. **The Compensation TF outlines below a process to launch, administer, and evaluate a Compensation Pilot for the JEDI-focused WG.**

The Compensation Pilot envisioned herein is focused on compensation solely for the JEDI-focused WG, however, its framework and certain aspects may be applicable to future or parallel compensation programs.

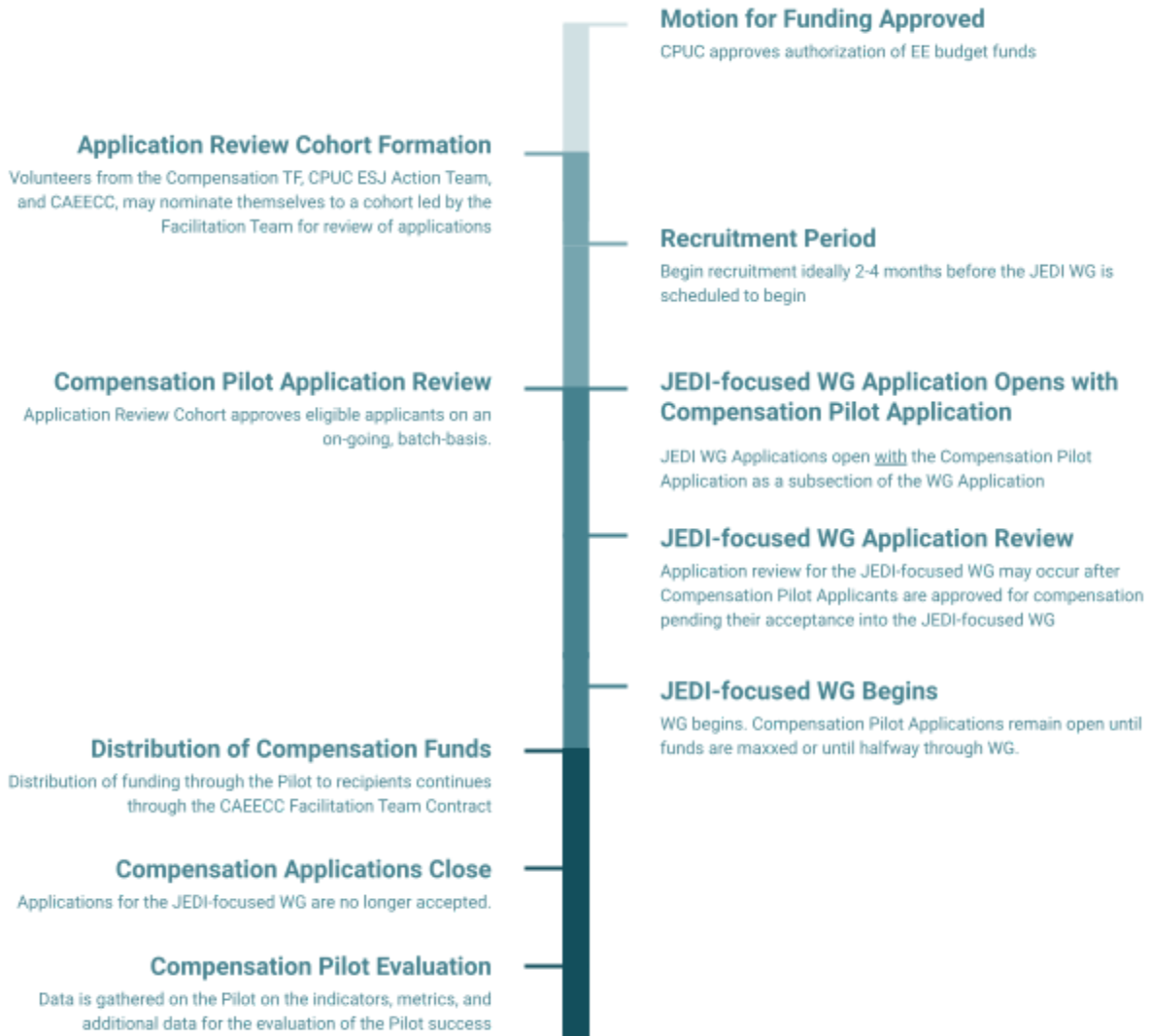
The Compensation TF met four times over the course of five months (June 2022 - October 2022). Task Force members were expected to attend all meetings and complete all homework assignments. A breakdown of each meeting objective and homework assignment is outlined below (see the [Compensation TF Webpage](#) for more information on the Task Force and full Meeting Summaries as well as [Appendix E](#) for membership composition):

- **Pre-Work:** Review Task Force Scope of Work and Charge; and review CDEI WG Final Report
- **Meeting #1:** Review Task Force Scope of Work and Charge; review compensation context from CDEI WG; and brainstorm initial recommendations
 - **Key Outcome(s):** A modified scope to focus solely on the JEDI-focused WG.
- **Homework #1:** Ideate Principles, Intentions, and Eligibility Criteria (PIE)
- **Meeting #2:** Adopt a set of PIE for compensation; prioritize possible funding sources; determine critical questions for compensation funding implementation processes
 - **Key Outcome(s):** An initial set of PIE; agreement to use Energy Efficiency (EE) Budget Funds
- **Homework #2:** Review Draft Application Sample, Application Review Process, Recruitment Strategies, Evaluation and Metrics; review PIE; and discuss pathways to unlock authorization for EE Budget Funds
- **Meeting #3:** Present pathway to unlock EE Budget Funds; adopt finalized PIE; and discuss Draft Recommendations
 - **Key Outcome(s):** Facilitators to draft the Final Report for review by the Task Force; PIE adopted
- **Homework #3:** Review Draft Final Report
- **Meeting #4:** Finalize Final Report
 - **Key Outcome(s):** Finalized Final Report submitted to CAEECC for Member review

Next Steps

Upon the formal adoption by CAEECC members of the recommendations of the Compensation Task Force as provided in this report, a Motion to authorize the use of Energy Efficiency Budget Funds for this Compensation Pilot will be filed.

The following graphic is meant to show the sequencing of events following the granting of the Motion authorizing funding (*note, graphic is not to scale*).



Recommendations

Unless otherwise indicated, the following recommendations represent consensus-based outcomes from the Task Force.

A. Principles, Intentions, and Eligibility Criteria

In an effort to ground the Pilot to its mission and purpose, the Compensation TF created a set of Principles, Intentions, and Eligibility Criteria (PIE). The Principles and Intentions are meant to be the guideposts for the Pilot, identifying why, how, and for whom this Pilot is intended to serve. They are based upon the work of the CDEI WG and the CPUC ESJ Action Plan vision to create an accessible, accepting environment that better includes and considers the perspectives of underrepresented communities regulatory policymaking and stakeholder engagement broadly speaking.

The Eligibility Criteria are meant to provide funding as a means of removing a critical barrier to participation, and at the same time, provide a flexible and accessible process to apply for and receive compensation so as to not discourage prospective applicants. The Principles, Intentions, and Eligibility Criteria will be used in the review of the applications (see [Application Review Process Recommendations](#) for more information).

A.1 Principles, Intentions, and Eligibility Criteria Recommendation #1: The Compensation TF recommends the following Principles, Intentions, and Eligibility Criteria be adopted in their entirety to guide the design and implementation of the Compensation Pilot.

Principles (Version 2)

1. Keep it simple to administer and operationalize.
2. Make it flexible (both in terms of access and process for reimbursement).
3. Be open to and value diverse skill sets, including lived/living experiences.
4. Strive for scalability and learning (through evaluation) for the whole of CAEECC.
5. Be empathetic to existing barriers for participation in CAEECC and identify easy-entry, accessible solutions.
6. Compensate for pre- and post-meeting work, and time that is spent on CAEECC-related activities, based on past CAEECC norms for pre and post-meeting work.
7. Both individuals and representatives of organizations may apply. It is important that it is clear whether someone is representing themselves, or whether they are a representative on behalf of an organization (e.g. Community-Based Organization). Eligibility rules might be tailored differently for individuals and organizations.

Intentions (Version 2)

1. Provide compensation to organizations/individuals who present financial need as a barrier to meaningful participation and contribution to CAEECC
2. Allow organizations/individuals to self-determine their financial need for compensation. Applicants will need to demonstrate financial need, but should have flexibility in how to document and demonstrate financial need.
 - a. Documentation for application and upon disbursement of funds needs to be sufficient to meet fiscal reporting requirements by the PAs contributing funds from their budgets, and according to any CPUC requirements on pilot funds.*
3. Compensate at a standardized rate for each individual/organization that considers value of time, subject matter expertise (including lived and living experience and perspective) for a specified duration of activity, e.g., for the duration of a Working Group process/defined series of meetings.
 - a. Recognize that some individuals may require financial support including but not limited to lodging, travel, food, family-care.**
4. Not requiring baseline knowledge of energy efficiency to participate in the JEDI-related WG compensation program; however, applying participants are encouraged to review background information EE (self-guided orientation through resources provided) and the CAEECC orientation in order to support meaningful participation.

** Documentation will depend on funding source requirements. Since participation may manifest in different ways (i.e., active participation, verbal comments, or silently learning and contributing via homework) documentation of contribution should be broad and flexible. Consider the use of polls, and other opportunities to document a base level of participation.*

*** self-defined family care*

Eligibility Criteria (Version 2)

Applicants must meet all three of the following criteria:

1. Individuals/organizations that can bring historically underrepresented perspectives, specifically those of DAC, ESJ Communities, LI households, LI communities/census tracts, tribal lands, HTR 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 a WG or stated engagement process and make meaningful contribution(s). Standard expectations of commitment and proxy representation apply.

B. Funding Source, Amount, and Reimbursable Costs

The Compensation TF, after deliberate conversations about funding for the Compensation Pilot (see *Meeting #2 Summary on [Compensation TF Meeting #2 Webpage](#)*), agreed to pursue the use of existing EE Budget Funds already authorized by the CPUC for the PA's (IOUs, RENs, and MCE) EE portfolios. The Task Force based this recommendation on the perceived appropriateness of the use of these funds, the timely and ease of access to these funds compared to grants or legislative allocations, and the ability to leverage the existing CAEECC facilitation contract, which is also funded through the EE budget.⁵

While the Commission has authorized EE funds for CAEECC facilitation and provide for the “minimum needed to hire a facilitator and conduct meetings to cover the scope of work outlined,” it is the interpretation of the IOUs and Energy Division staff that authorization will not support use of funds for compensating individuals to participate in CAEECC activities.⁶ As such, the Compensation Pilot will require specific authorization to use EE Budget Funds for the purposes of this Pilot by the Commission. Budget authorizations require a regulatory process that allows for stakeholder input, such as a Motion for a Ruling (which includes a comment period) and/or the development of a record ahead of a Decision.

B.1 Funding Recommendation #1 | Funding Authorization: On behalf of the Compensation TF, SoCalREN shall submit a Motion (see [Appendix A: Motion Outline](#)) to R.13-11-005 requesting authorization from the CPUC for PAs⁷ to allocate unspent EE Budget Funds for the Compensation Pilot and will reference this Final Report to outline the oversight, administration, distribution, recruitment and evaluation of the Pilot. This Motion shall be submitted within 30 days of the approval of the recommendations within this report by CAEECC Members. PAs shall work collaboratively to seek a co-funding agreement for the Pilot, however, should PA-wide coordination prove to be cumbersome or lengthy, the PAs may elect for the Pilot to be funded through an

⁵ The Task Force considered the use of philanthropic funding, new ratepayer funding, and the (at the time) pending \$30 million in community engagement funds set for the CPUC in the budget. Due to the longer and uncertain timeline of these funds, among other uncertainties, they were deemed not ideal for the purposes of this pilot.

⁶ See D.15-10-028, Ordering Paragraph 11, pages 125 - 126

⁷ Program Administrators (PAs) referenced hereafter refer to the IOUs, RENs, and MCE that administer energy efficiency programs.

IOUs-only co-funding agreement. Any allocation to the Compensation Pilot shall count towards that PA's Equity segment spend.

B.2 Funding Recommendation #2 | Funding Amount: The Task Force requests up to \$185,000 of unspent EE Budget funds to fund the Compensation Pilot. This would allow approximately 10 recipients of compensation for a Working Group process, assuming up to 6 Working Group meetings and including attendance at up to 2 Full Quarterly CAEECC meetings, 1 ad hoc workshop or additional meeting, and required preparatory and follow-up work. The full assumptions are documented in the Budget Proposal (see [Appendix B: Budget Proposal](#)). The actual number of Pilot Recipients served will depend on the final Work Group process, time required, and actual funding needed per participant.

B.3 Funding Recommendation #3 | Reimbursable Costs: In addition to time compensation, documented costs that directly support participation in the Working Group meetings and activities shall also be considered reimbursable. The categorized costs below are meant to be *illustrative*, and actual reimbursement will require approval of the Administrator of the Compensation Pilot⁸:

- Travel costs, such as airfare, lodging, meals, mileage, parking.
- Self-determined family or childcare costs
- Medical or disability accommodation, if accommodation is unable to be provided by the Working Group
- Other direct and incremental expenses associated with in-person or virtual participation

C. Administration of Pilot

The following reflects consensus recommendations from the Task Force regarding the administration and oversight, application, and distribution of compensations funds.

C.1 Pilot Administration and Oversight

C.1.1 Pilot Administration and Oversight Recommendation #1 | Contracting PA: Funds shall be contributed to the PA holding the Compensation Pilot contract.

C.1.2 Pilot Administration and Oversight Recommendation #2 | Pilot Administrator: Funds shall be administered by the Facilitation Team for the Pilot. Administrative duties include supporting the recruitment and application process, documentation of Pilot recipient eligibility, the amount and distribution of funds to recipients using an invoicing or other process, and the evaluation process.

⁸ The Task Force referenced the EE Manual of Allowable Costs and Intervenor Compensation (I-Comp) Disallowable Costs, as well as considered other potential cost barriers to participation in the Working Group, to develop this list, but does not endorse use of either document to govern eligibility of costs.

C.1.3. Pilot Administration and Oversight Recommendation #3 | Oversight: The CAEECC Facilitation Team shall retain all documentation from the Pilot, provide updates regarding use of funds to the full CAEECC and JEDI-Focused WG as appropriate about the status of the pilot, and conduct data collection and evaluations to provide a Mid-Pilot Report and Final Pilot Report.

C.1.4 Pilot Administration and Oversight Recommendation #4 | Administration Budget Cap: Up to 15% of authorized Pilot funds may be allocated to the Facilitation Team for administrative and program support activities, as delineated above.⁹ Such funds would be tracked, accrued, and invoiced as contractually required.

C.1.5 Pilot Administration and Oversight Recommendation #5 | Executive Authority: Any executive decisions about the Pilot shall be made in concert with CAEECC, CAEECC Co-Chairs, Energy Division, and the Facilitation Team, and shall be ultimately determined by the PAs.

C.2 Application for Compensation and Sample Application

C.2.1 Application for Compensation and Sample Application Recommendation #1: Adopt the Sample Application (see [Appendix C](#)) as a subsection of the JEDI-focused WG Member Application. Redundant questions may be integrated appropriately with the JEDI-focused WG Member Application.

The Compensation TF scope does not include creation of the JEDI-focused WG Member Application, however, the Task Force recommends that in addition to the Compensation Pilot application process being straightforward and distinct from the JEDI-focused WG application (as not all future WG members may request compensation), it also be attached to it for ease of access.

Lastly, information about the Compensation Pilot should be provided to all applicants of the JEDI-focused WG, informing applicants about their potential eligibility and ability to participate in the Compensation Pilot. This information should include the Principles, Intentions, and Eligibility Criteria as well as CAEECC WG expectations and meeting norms.

C.3 Application Review Process

C.3.1 Application Review Process Recommendation #1 | Review Cohort: The Compensation Pilot Applications shall be reviewed by a review cohort consisting of the facilitation team and volunteers from the CPUC ESJ Team, Compensation TF, and CAEECC (who will not be applying to participate in the JEDI-focused WG). The

⁹ The Task Force considered the conventional 10% administrative cap commonly used in energy efficiency programs. Considering the novel nature of the Pilot program and the broader scope of administrative and program support duties, the Task Force agreed a 15% administrative cap was more realistic.

Facilitation Team will ask for volunteers from the entities above after the authorization of the Motion is approved by the CPUC.

C.3.2 Application Review Process Recommendation #2 | Timing: Applications will be invited ahead of the launch of the working group and will be open on a rolling basis and reviewed on a batch-basis in the order they were submitted.¹⁰ *Note: Reviewer committee may choose to meet on a predetermined frequency (similar to how other WG application review committee meets) or deliberate over ad hoc meetings or email.*

C.3.3 Application Review Process Recommendation #3 | Acceptance: Pilot acceptance will be granted on a batch-basis to ensure to the extent possible geographic balance in the applicants accepted into the pilot, until the Compensation Pilot funding cap has been reached. Eligible applicants must meet all Eligibility Criteria such that their participation in the Pilot reflects the Pilot's Principles and Intentions. In the case the Compensation Pilot application is reviewed ahead of the JEDI-focused Working Group Membership Application, acceptance into the Compensation Pilot may be granted, but would be contingent upon approval to participate in the JEDI-focused WG.

C.4 Distribution of Funds

C.4.1 Funding Distribution Recommendation #1 | Distributor: The funds shall be distributed to successful applicants for the Compensation Pilot (Pilot Recipients) by the CAEECC Facilitation Team.

C.4.2 Funding Distribution Recommendation #2: | Distribution: Pilot Recipients shall have funding distributed through two mechanisms.

- **Standard Amount for Meetings or Activities:** Meetings and Activities shall be compensated through a predetermined standard amount of compensation. The amount would be determined by the Pilot Administrator and shall be based on reasonable assumed time required for meeting prep, attendance, follow-up, and other expected Working Group responsibilities. The Pilot Recipient shall invoice the Pilot Administrator upon the completion of a Meeting or Activity for the predetermined standard amount(s).
- **Additional Costs:** Additional costs may include, but are not limited to, additional requested or required work not included in standard meeting or activity scope, and eligible reimbursable costs. The Pilot Recipient shall invoice the Pilot Administrator for payment no more than monthly for these additional costs.

¹⁰ The Task Force recognizes that the JEDI-focused Working Group Applications may close, but recommends that the Compensation Pilot remain open (pending fund availability) for any Working Group members that determine mid-process that compensation is needed to fully participate and remain involved.

D. Recruitment

D.1 Recruitment Strategy Recommendation #1 | Recruiters: Volunteers from the Compensation TF, CAEECC, and the CPUC ESJ Team, with the coordination support of the Facilitation Team, shall conduct outreach to raise awareness about the Compensation Pilot.

D.2 Recruitment Strategy Recommendation #2 | Outreach Process: Outreach (e.g. emails and meetings) shall begin with groups identified below. The Facilitation team will provide a template for outreach. Additional work to identify individuals and their contact information will be needed to facilitate outreach.

From the *Pre-identified List of Prospective JEDI-focused WG Participants* included in the CDEI WG Final Report

- Trade allies
- Unions (work/work implementation groups)
- Authorized Agents of IOU's and Implementers
- Youth, universities, and emerging professionals (including respective diversity groups)
- Consumer advocates like CalPA and TURN
- Environmental, Racial, and Social Justice groups like Greenlining, Rising Sun, and California Environmental Justice Alliance (CEJA)
- Other experts (e.g., other agencies)
- Advocacy groups whose mission is to promote and establish diversity in EE (similar to E2, ACEEE, etc.)
- A representative sample of customers
- Local Government Coalitions
- Community Based Organizations and/or aggregations of Community Based Organizations
- Local Government Climate Action Organizations
- Tenant right groups
- BIPOC specific groups
- Community Service District Latino Service Providers

Additional outreach ideas (beyond the *Pre-Identified List* above) may also come from Compensation TF contacts and suggestions (see [Appendix D](#)).

D.3 Recruitment Strategy Recommendation #3 | Timeline: Begin outreach efforts upon 1) CAEECC Member approval and adoption of these recommendations, 2) CPUC authorization of Pilot funds, and 3) the launch of the JEDI-Focused WG by CAEECC. Outreach will continue until all of the Compensation Pilot funds have been allocated or, for existing members of the JEDI-focused WG, when the JEDI-focused WG is beyond the halfway point of its charge.

E. Pilot Evaluation

E.1 Evaluation Recommendation #1 | Preliminary Criteria: Consider adoption of the following preliminary evaluation criteria that shall be finalized with additional input sought by the Pilot Administrator (e.g., seeking DEI and/or evaluator input, JEDI-focused WG members). Evaluation and collection of data may be conducted through periodic surveys, interviews, of both Pilot Recipients and JEDI-focused WG members. Results from any data collection and evaluation shall be provided in the Mid-Pilot Report and Final Pilot 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 JEDI-focused WG
 - a. Percentage (and absolute #) of JEDI-focused WG overall that is/represents new individuals, organizations, and perspectives/expertise to CAEECC
 - b. Percentage of JEDI-focused WG overall that is/represents a CPUC ESJ Community
 - c. Percentage (and absolute #) of members of JEDI-focused WG from a CPUC ESJ Community that is receiving Compensation Pilot funds
 - d. Percentage (and absolute #) of members of JEDI-focused WG 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

E.2 Evaluation Recommendation #2 | Additional Data: In addition to the preliminary evaluation criteria proposed above, the Compensation TF recommends 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)

E.3 Evaluation Recommendation #3 | Not for Measurement: The Task Force also discussed two criteria that they strongly recommend not be used to measure the success of the pilot.

- The outcome of a Working Group
- A set of predefined *productive contributions*

The Task Force believes 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.

Conclusion

The Compensation Task Force requests CAEECC Members' review and adoption of the recommendations within this report in their entirety. Through the implementation of this Pilot, the Task Force believes that CAEECC will demonstrate acts of inclusion that can lead to the increased diversity in CAEECC and the CPUC policy making processes, leading to more equitable outcomes in the community's collective energy efficiency efforts.

Appendices

- A. Motion Outline
- B. Budget Proposal
- C. Application Sample
- D. Compensation TF Prospective Applicant Contact List
- E. Task Force Membership

Appendix A: Motion Outline

- Introduction
- Summary of Compensation Task Force recommendations and CAEECC request for authorization of funds for Compensation Pilot for JEDI-focused WG
 - Purpose and benefits of compensation pilot
 - Why EE funding source
 - Recommended administration
- Background on EE funding authorization
 - D.15-10-028, what it orders and allows, interpretation that funds cannot be used for the purposes
 - Seeking budget authorization for defined use of XYZ
- About the Compensation Pilot
 - Administration and process, criteria and oversight to ensure proper use of ratepayer funds
 - Application process + eligibility
 - Approval process
 - Distribution of funds process
 - Evaluation
- Request for authorization
 - Pilot budget amount
 - Authorization of future funds via Tier 2 Advice Letter
- Conclusion

Appendix B: Budget Proposal

Note, this table was revised by the Task Force from a summary table incorporated into the CDEI Final Report. It is intended to facilitate a budget estimation but does not constitute final amounts.

SAMPLE Annual Compensation Budget for Pilot Recipients: ONE WG PROCESS of 6 meetings + 2 Quarterly				
CAEECC Onboarding	Hours per event	\$/hr	Total \$/event	Total \$/Process
Onboarding and Training	8	\$150.00	\$1,200.00	
Additional costs, e.g. Per Diem	N/A	N/A	\$200.00	
		Subtotal	\$1,400.00	\$1,400
CAEECC Quarterly meetings (2 per year)	Hours per event	\$/hr	Total \$/event	Total \$/Process
CAEECC Meeting Attendance	6	\$150.00	\$900.00	
CAEECC Meeting Preparation	2	\$150.00	\$300.00	
CAEECC Meeting Follow-up	2	\$150.00	\$300.00	
Additional costs, e.g. Per Diem	N/A		\$200.00	
		Subtotal	\$1,700.00	\$3,400.00
Participation in one (1) Working Group (Assume 6 Working Group meetings per year)	Hours per event	\$/hr	Total \$/event	Total \$/Process
Working Group Meeting Attendance	4	\$150.00	\$600.00	
Working Group Meeting Preparation	2	\$150.00	\$300.00	
Working Group Meeting Follow-Up	2	\$150.00	\$300.00	
Working Group Meeting Homework	2	\$150.00	\$300.00	
Additional costs, e.g. Per Diem	N/A		\$200.00	

		Subtotal	\$1,700.00	\$10,200.00
Ad-Hoc Workshops (Assume 1 workshops per WG process)	Hours per event	\$/hr		Total \$/Process
Stakeholder Workshops	4	\$150.00	\$600.00	
Additional costs, e.g. Per Diem	N/A		\$200.00	
		Subtotal	\$800.00	\$800.00
Cost per Pilot Recipient per WG Process				\$15,800
Estimated budget for a single 6-meeting WG process per compensation Pilot Recipient				
Budget can change depending on how many Pilot Recipients to be able to be supported				
	Number of Pilot Recipients	5	10	15
	<i>Total Annual Compensation to Pilot Recipients</i>	\$ 79,000	\$ 158,000	\$ 237,000
Program Budget	15% for admin	\$ 13,035	\$ 27,882	\$ 41,824
	Annual Total	\$ 86,900	\$ 185,882	\$ 278,824
High-Cost Scenario	High Annual Total	\$ 99,935	\$ 204,471	\$ 306,706
Low-Cost Scenario	Low Annual Total	\$ 78,210	\$ 167,294	\$ 250,941

Appendix C: Application Sample

The following sample is associated with C.2.1 Application Recommendation #1.

Sample application for the Compensation Pilot.

This application is for the Compensation Pilot specifically for prospective members of the JEDI-focused Working Group of the California Energy Efficiency Coordinating Committee (CAEECC). The Compensation Pilot is a funding mechanism to welcome burdened individuals or organizations and alleviate the barrier of ‘participation without compensation’. The intent, principles, and eligibility criteria of Compensation Pilot are located in the Application Appendix. The Compensation Pilot (and JEDI-focused WG) will adhere to the CAEECC Ground Rules and Meeting Norms (see Appendix).

The deadline to apply for the Compensation Pilot is rolling, pending available funds. Applications will be reviewed in the order they are submitted and granted compensation until funding is maxed out. Interviews *may* be requested with compensation applicants. Please fill out the following application form.

** Connotes a required field below.*

*Would you like to apply for the Compensation Pilot? [Yes/No](#)

Contact Information

*Primary Contact Name (First and Last); Primary Contact Pronouns; Primary Contact Email; Primary Contact Phone

Proxy Contact Name (First and Last); Proxy Contact Pronouns; Proxy Contact Email; Proxy Contact Phone

*Will you be representing: [Yourself/Organization](#)

**If responded ‘An Organization’ above, required | Name of Organization:*

What mission and values does your participation represent (as an individual or organization)? _____

*Please describe what perspective(s), representation(s), or community/ies with which you identify.

Compensation Pilot Eligibility

*Would participating in the WG create a financial hardship for you or your organization? [Yes/No](#)

* Please explain why you would not be able to participate in the JEDI-focused WG without financial compensation. _____

CAEECC Policies and Interest

*Do you agree to abide by the Ground Rules and Meeting Norms for CAEECC and CAEECC working groups?¹¹ [Yes/No](#)

Describe specific prior experience (if any) working collaboratively in other stakeholder processes. _____

⁵ See JEDI-focused WG Scope of Work Appendix

*Are you committed to make meaningful contributions to this working group by participating in the pre-work, meeting attendance and active engagement, and meeting follow-up or homework?¹² [Yes/No](#)

¹¹ See JEDI-focused WG Scope of Work Appendix

¹² Meaningful contributions include: participation in meetings, participation in interactive meeting elements, completion of homework/pre-work.

Appendix D: Compensation TF Prospective Applicant Contact List

Organizations

Asian Pacific Partners for Empowerment, Advocacy and Leadership (APPEAL)	Bay Area Regional Health Inequities Initiative (BARHII)	California Energy Alliance
Abrazar, Inc.	Be Smooth, Inc.	California Environmental Justice Alliance
Access Reproductive Justice	Bell Gardens Chamber of Commerce	California Green Business Network
African American Chamber of Commerce	Berkeley Food Institute	California Food and Farming Network
Albie Aware Breast Cancer Foundation	Black Chamber of Commerce of Inland Empire	California Health Collaborative
Alcohol Justice	Black Leadership Council	California Healthy Nail Salon Collaborative
Alhambra Chamber of Commerce	Black Women for Wellness Action Project	California Immigrant Policy Center
Alliance for a Better Community	Blue Shield of California	California Latinas for Reproductive Justice
AltaMed Health Services	Brea Chamber of Commerce	California Latino Business Institute
American Council for EE Economy (ACEEE)	BreastfeedLA	California Pan-Ethnic Health Network
American Heart Association	CA4Health	California Primary Care Association
Antelope Valley Hispanic Chamber of Commerce	California Access Coalition	California Reinvestment Coalition
API Equality-LA	California Asian American Professional Society	California School Nurses Organization
APLA Health	California Association of Nonprofits (CalNonprofits)	California School-Based Health Alliance
APTP SAC	California Black Chamber of Commerce	California State University Channel Islands, Department of Health Science
Asian Business Association Inland Empire	California Black Health Network	California Urban Partnership
Asian Resources, Inc.	California Black Women's Collective	CaliforniaHealth+ Advocates
Asian Youth Center	California Black Women's Health Project	Californians for Safety and Justice
Association of California Community and Energy Services (ACCES)	California Chronic Care	
BANJ Health Center Inc.	California Clean Energy Association	
Bay Area Central American Chamber of Commerce	California Department of Community Services & Development	

Camara de Comercio Agrupación de Comerciantes del Norte de California	Collaborative in San Diego County	East Oakland Building Healthy Communities Initiative
Camarillo Chamber of Commerce	Colton Chamber of Commerce	Ecology Center
Capitol City Black Nurses Association	Comerciantes Unidos Stockton	Elk Grove Chamber of Commerce
Central California Hispanic Chamber of Commerce	Comité Cívico Del Valle	Empowering Pacific Islander Communities (EPIC)
Central California LGBTQIA+/2S Collaborative	Common Threads	Empowerment Association
Central Valley Asian American Chamber of Commerce	Communities for a Better Environment	End Hep C SF
Central Valley Hispanic Chamber of Commerce	Communities United	Environmental Justice Air Quality Coalition
Central Valley Immigrant Integration Collaborative (CVIIC)	Community Action Partnership of San Luis Obispo	Esperanza Community Housing Corporation
Central Valley Pacific Islander Alliance	Community Alliance with Family Farmers (CAFF)	Essential Access Health
Centro Binacional para el Desarrollo Indígena Oaxaqueño	Community Clinic Association of Los Angeles County	Face to Face, Ending HIV in Sonoma County
Centro Del Inmigrante	Community Health Councils	Faith in the Valley
Ceres Community Project	Community Health Partnership, Inc.	First 5 Alameda County
Cerritos Chamber of Commerce	Cooperation Humboldt	Fresno Barrios Unidos
ChangeLab Solutions	COR Community Development Corporation	Fresno Community Health
Changing Tides Family Services	CPUC Listservs	Improvement Partnership (FCHIP)
Children's Cause Orange County	CRLA Foundation	Fresno Interdenominational
Children's Defense Fund-California	Cultiva La Salud	Refugee Ministries (FIRM)
Christie's Place	Detour Empowers FANCY Teen Girls	Fresno Metro Black Chamber of Commerce
Chula Vista Elementary School District	Dignity Health	Gilroy Chamber of Commerce
Clean Up Green Up	Diversity Business Forum of SABAN	Gods' Grace Outreach Ministries, International
Climate Justice Alliance	DOCS4POC	Grassroots Global Justice
CleanEnergy States Alliance (CESA)	Don't Waste LA	Greater Coachella Valley Chamber of Commerce
	Dovetail Learning, Inc.	Greater Corona Hispanic Chamber of Commerce
	East Los Angeles Chamber of Commerce	

Greater Sacramento Vietnamese American Chamber of Commerce	Impact Southern California	Liver Coalition of San Diego
Greater Riverside Hispanic Chamber of Commerce	Inland Empire Immigrant Youth Collective	Local Clean Energy Alliance
Green LA Coalition	Inland Empire Regional Chamber of Commerce	Local Government Sustainable Energy Coalition
Guatemalan American Chamber of Commerce	Institute for Public Strategies	Loma Linda University School of Public Health
Health Access California	International Foundation for Autoimmune & Autoinflammatory Arthritis (AiArthritis)	Los Angeles Christian Health Centers
Healthy African American Families	Jakara Movement	Los Angeles County Department of Public Health
Healthy Hearts Institute	Justice in Aging	Los Angeles Latino Chamber of Commerce
HEART of Davis	JW Healthcare Insights	Los Angeles Metropolitan Churches
Helpline Youth Counseling	Kern County Hispanic Chamber of Commerce	Mark Horton LLC
Hemophilia Council of California	KIXE PBS	Maternal and Child Health Access
Hispanic Chamber of Commerce of Contra Costa County	Korean Community Center of the East Bay	Mental Health Advocacy Services
Hispanic Chamber of Commerce of Marin County	Korean Community Services	Mental Health America of Los Angeles
Hispanic Chamber of Commerce of Northern California	Latin American Caribbean Chamber of Commerce	Merced County Department of Public Health
Hispanic Chambers of Commerce of San Francisco	Latin Business Association	Merced County Hispanic Chamber of Commerce
Hispanic Chamber of Commerce of Silicon Valley	Latin Business Foundation of Silicon Valley	Merced County Indian Chamber of Commerce
Hispanic Chamber of Commerce of Sonoma County	Latin Chamber of Commerce Las Vegas	Mi Familia Vota
Hmong Cultural Center	Latino Coalition for a Healthy California	Mid-City Community Advocacy Network
Human Impact Partners (HIP)	Latino Tax Professionals	Miracles and Dreams Foundation
Humanidad Therapy & Education Services	LC Disability Consulting	Mixteco Indigena Community Organizing Project (MICOP)
Huntington Beach Chamber of Commerce	Leah's Pantry	Modesto Chamber of Commerce
I Am Love	Let's Kick ASS AIDS Survivor Syndrome	
	LifeLong Medical Care	
	Little Manila Rising	

Multi-Ethnic Collaborative of Community Agencies	Nutrition and Fitness Collaborative of the Central Coast (NFCCC)	Public Health Strategies
Multicultural Health Foundation		Racial and Ethnic Mental Health
Mulvaney's B&L	Oakland African American Chamber of Commerce	Disparities Coalition
Napa County Hispanic Chamber of Commerce	Oakland Climate Action Coalition	Reach Out
NARAL Pro-Choice California	Oakland Latino Chamber of Commerce	Regional Asthma Management and Prevention
National Asian American Coalition	Oceanside Chamber of Commerce	Regional Pacific Islander Taskforce - Bay Area
National Diversity Coalition	Ontrack Program Resources	Ripon Chamber of Commerce
National Harm Reduction Coalition	Ontario Hispanic Chamber of Commerce	River Oak Center for Children
National Health Law Program	Open Door Community Health Centers	Riverside County Black Chamber
National Hispanic Business Women Association	Orange County Hispanic Chamber of Commerce	Roberts Family Development Center
National Union of Health Care Workers	Orange County Hispanic Youth Chamber of Commerce	Roots Community Health Center
NextGen California	Oxnard Chamber of Commerce	Roots of Change
Nicaraguan American Chamber of Commerce Northern California	Pacific Asian Counseling Services	Rural County Representatives of California
NICOS Chinese Health Coalition	Painted Brain	RYSE
NLBWA - Inland Empire	Partners in Care Foundation	Sacramento Black Chamber of Commerce
NLBWA - Los Angeles	Pesticide Action Network	Sacramento Hispanic Chamber of Commerce
NLBWA - San Diego	Physicians for a Healthy California	Sacramento Maternal, Child and Adolescent Health Advisory Board
North Coast Clinics Network	Planned Parenthood Affiliates of California	Salud Para La Gente
North State Hispanic Chamber of Commerce	Pomona Chamber of Commerce	San Diego County Hispanic Chamber of Commerce
Northern California Center for Well-Being	PRC	San Francisco AIDS Foundation
Northern California Peruvian Chamber of Commerce	Prevention Institute	San Francisco African American Chamber of Commerce
Nourish California	Public Health Advocates	San Francisco Filipino American Chamber of Commerce
	Public Health Institute	

San Francisco Senior and Disability Action	St. James Infirmary	United Way Bay Area
San Juan Capistrano Chamber of Commerce	Street Level Health Project	United Ways of California
San Joaquin County Hispanic Chamber of Commerce	Substratum Systems LLC	United Women of East Africa Support Team
San Mateo Hispanic Chamber of Commerce	Tarzana Treatment Centers Inc.	University of California Berkeley School of Public Health
Sanctuary of Hope	Temecula Valley Chamber of Commerce	U.S. Green Chamber of Commerce
Santa Ana Chamber of Commerce	Thai Community Development Center	US Latino American Chamber of Commerce
Scripps Health	The Central Valley Urban Institute	US-Mexico Chamber of Commerce
Second Baptist Church	The Children's Partnership	Urban Strategies Council
Seeds of Hope	The Coalition of Orange County Community Health Centers	Ventura Chamber of Commerce
SEIU2015	The Fresno Center	Veritable Vegetable
Sepsis Alliance	The G.R.E.E.N Foundation	Village Movement California
Silicon Valley Black Chamber of Commerce	The Health Trust	WALKSacramento
SISTAHFRIENDS Women's Counseling Services	The Índigo Project	Watsonville Law Center
Slavic American Chamber of Commerce	The Latino Coalition Against COVID-19	Wellspring Women's Center
Solano Hispanic Chamber of Commerce	The Los Angeles Trust for Children's Health	Western Center on Law and Poverty
South Bay Community Services	The Unity Council	Wholesome Wave
South Gate Chamber of Commerce	The Urban Collaborative Project	Wintu Education and Cultural Council
South Modesto Businesses United	Think Dignity (formerly Girls Think Tank)	Women Organized to Respond to Life-threatening Diseases (WORLD)
Southern California Hispanic Chamber of Commerce	Toberman Neighborhood Center	Worksite Wellness LA
Southside Coalition of Community Health Centers	Tracy Chamber of Commerce	YES Nature to Neighborhoods
SSG/Asian Pacific Islander Forward Movement	Transformational Health and Wellness	Youth Forward
SSG/PALS for Health	Trinity Lutheran Church	Youth UpRising
	Tulare Kings Hispanic Chamber of Commerce	<u>Individuals</u>
	United Parents and Students	Aaron Thompson, Los Angeles

Abby Jaramillo, San Francisco	Anna Steiner, San Francisco	Camille Anacabe, San Francisco
Adele Amodeo, Albany	Anne-Lise Francois, Berkeley	Candace Campbell, Valley Glen
Adriana Botic, Denver	Annie Pennell, Richmond	Carla Cassani, Menlo Park
Adriana Ramos-Yamamoto, MPH	Ariadne Villegas, Merced	Carla Compton, Placerville
Adrienne Markworth, La Jolla	Ariana Thompson-Lastad, PhD	Carla Davis, Corte Madera
Alexandra Libro, Los Angeles	Arisa Palmer, Orange	Carla Rosin, Santa Barbara
Ali Goodyear, Pasadena	Arpine Shakhbandaryan, Glendale	Carmen Rosales Solorzano, Glendora
Alison Negrin, Alamo	Art Hanson, Lansing	Carolina Goodman
Alison Wohlgemuth, Brentwood	Astrid Campos, Glendale	Charlie Nelson, Shasta Lake City
Allison Coleman	Baolia Xiong, Fresno	Charlie Shearer, Bakersfield
Alvaro Garza, Modesto	Barbara Rojas-Baez, Oakland	Cheri Langlois, Mendocino
Amaranta Marcelos, Sacramento	Barbara Towle, Greenbrae	Christi Ketchum
Amelyne Major	Bert Greenberg	Christianne Schurman
Amy Shuba, San Francisco	Beth Spitler, Sacramento	Christina Babst, West Hollywood
Anastasia Coutinho, Concord	Beth Thayer, Ventura	Christina Stephenitch
Andrea Chirino, Downey	Beth Wyatt, Santa Rosa	Christine Moss, Clovis
Andrea Dumas	Birgit Hermann, San Francisco	Cindy Young
Andrea LaCampagne, Guerneville	BobbieFlowers, New York	Clarissa Vivian, Fresno
Andrea Mackey, Sacramento	Bobby Dalton Roy, Sacramento	Claudia G. Corchado, Merced
Andrea Picones Castro, El Cerrito	Boris Ricks, Northridge	Constance Best, Boonville
Andrea Rayas, Maywood	Brenda Villanueva, Canoga Park	Corinna Tempelis, Berkeley
Andrew Deckert, MD, MPH	Brianna Holmes,	Craig McNamara, Winters
Andrew Feil, Fresno	Bridget McCann, Long Beach	Dana Stephens, Ojai
Andrew Naja-Riese, San Rafael	Brie Gelinis, Charlotte	Dana Walden, Vista
Angel Valdez, San Pablo	Brooke Frost, Fresno	Daniel Companetz, Oakland
Angela Gardner, Whittier	Bruce Mentzer, Healdsburg	Daniel S. Madrigal, MPH
Ann Finkelstein, Vallejo	Caitlin Esparza,	Daniel Wilkinson,
	Caitlin McGrath, Oakland	Danuta Filipowski, San Francisco
	Callia Hansen, Oakland	

David Shatkin, Occidental	Elizabeth Tumbas, Plymouth	Irene Hjelmervik, Riverside
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DeAngelo Mack, Sacramento	Ellie Gladstone, Alameda	Ivette Diaz-Quintero
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Deanna Lewis, Oakland	Emily Saeger, Saratoga	J. Miakoda Taylor, Berkeley
Debbie Tenenbaum, Berkeley	Emily Webb, Concord	Jacquolyn Duerr, Sacramento
Deborah McIntosh, Temecula	Erin Herman, Oakland	James Nolan
Deborah Yashar, Grass Valley	Erin Manalo-Pedro	Janedra Sykes, El Cajon
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Diana Cole, Oceanside	Gail Caswell, San Francisco	Janine Moniot
Doris Meier, San Francisco	Gail Kennedy	Javier Melendez, Oakland
Dorrine Marshall, Irvine	Gail Roberts, Tecate	Jean Kaplan, Willits
Dr. Donielle Prince, MS.Ed., Ph.D.	Gary Peterson, Pacific Grove	Jeffrey Ring, Glendale
Dr. John F. Simmons, Jr.	Genevieve LeBlanc, Salinas	Jenny Kattlove, Claremont
Dr. Mha Atma S. Khalsa, Los Angeles	Genoveva Islas, Fresno	Jeremy Baril, Santa Rosa
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Dudley Campbell, Valley Glen	Gladwyn d'Souza, Belmont	Jessamine Anderson
Edith Ogella	Glenda Corning, Corte Madera	Jessica Hirsch, Santa Monica
Edye Kuyper	Greg Ostroff, Belvedere	Jessie Liu, Berkeley
Eileen Donnelly, Santa Cruz	Hannah Peters, Oakland	Joanne Gamble, Gualala
El Pe, Talmage	Haoming Zhang	Joelle Signorelli, Elk
Elaine Benjamin, Alpine	Haydee Romero	John G. Bergen
Elena Pereira, Walnut Creek	Hazel Lambert, Moreno Valley	John Kotick, Los Angeles
Eli Tizcareno, North Hollywood	Heather Seto, Burlingame	Jolene Beiser, Los Angeles
Elizabeth Saft, Davis	Hieu Nguyen	Jon Anderholm, Cazadero
	Holly Scheider, Berkeley	Jonathan Bash, Martinez

Jonathan Lepule, Chula Vista	Keely Rider, San Francisco	Lisa Selby
Jonathan Weinstock,	Keith Baker	Lisette Muñoz, San Diego
Jose Torres Casillas, Sacramento	Kevin Norton	Lora Logan, San Diego
Joseph Perl, Oakland	Kiara Gonzalez, Richmond	Lori Johnson, Novato
Judy Rich, Los Angeles	Kimberly Gray, Los Angeles	Lorna Hardin, Chula Vista
Julia Lund, Sacramento	Krista Martinez-Trimlett, La Mesa	Lynn Silver, MD, Berkeley
Julian Venegas	Kristen S. Marchi, San Francisco	Lynna Harris, Oakland
Julie Freestone, Richmond	Kristina Gelardi	M. Virginia Leslie, Milpitas
Julie Good, Palo Alto	L. Lane	Mackare Jones
Julie Makrai, Morgan Hill	Laila Solaris, San Francisco	Maddie Ribble, Long Beach
Julie Maybe Lins	Larry Martin, Forestville	Marcie Parisi
Jullie Calkins	Laura Guzman, San Leandro	Mario Ortega, Anaheim
Kae Gifford, Sebastopol	Laura Kelly, Oakland	Marisha Zeffer, Oakland
Kaleia Wilkinson, Long Beach	Laura Ramirez, Oakland	Mark Bradley Cappetta
Karen Berger	Lauren Bouyea, Carmel Valley	Mark Reback, Los Angeles
Karen Metcalf,	Lauren Hill, Los Angeles	Mark Wyatt, Santa Rosa
Karen Ratzlaff, Santa Rosa	Lauren Linda, Laguna Woods	Mary Kate Morris, Berkeley
Kari Hamerschlag, Oakland	Lauren Murdock, Santa Barbara	Mary Nicholson, French Camp
Karina Saucedo	Leila Romero, Kelseyville	Mary Ott
Karissa Zingula, El Monte	Leslie Toy, Los Angeles	Mary Ponder, Sacramento
Karla Guerra, Oakland	Lily Dorn, Los Angeles	Mary-Beth Meyer, LCSW
Kat Wortham	Lilyane Glamben	Maryellen Redish, Palm Springs
Kate Cheyne	Linda Baggio, Visalia	Mason Taylor, Sacramento
Kate Sachnoff	Linda Guffin	Matthew Lange, Davis
Kate Walrath, Oakland	Linda Weiner	Matthew Page, Newbury Park
Kathy Les, Sacramento	Lindsey Wade, San Diego	Mayra Jimenez, San Rafael
Kawika Liu, West Covina	Lisa Chipkin, North San Juan	Mayra Satterlee
Kayla Williams, Elk Grove	Lisa Miller, Santa Rosa	Megan Key, Anaheim
Kayla Williams, Santa Clara	Lisa Segnitz, Santa Cruz	Michael Cahn, Santa Monica

Michael Dimock, Santa Rosa	Peter Kuhn, San Diego	Sonia Flowers, Richmond
Michael Scippa, Tiburon	Quetzalli Rocha, Oakland	Soundhari Balaguru, Lafayette
Michael Tomczyszyn, San Francisco	Rachel Wesen, Berkeley	Stacie Hiramoto, Sacramento
Michelle Freridge, San Gabriel	Rachelle Schulken, Folsom	Stacy Shwartz Olagundoye,
Michelle Maddex, Oakland	Rajesh Desai, Sebastopol	Steven Guilliams, San Francisco
Micki Besancon, Nevada City	Rajiv Narayan	Susan Campbell, Santa Rosa
Miriam Ada	Rena Kaminsky, Palo Alto	Susan Horne, Santa Barbara
Monika Lee, Sacramento	Rhonda Smith, Sacramento	Susan Lopez-Payan
Nai Kasick	Richard Theis, Sebastopol	Susan McCorry, Santa Monica
Nakia Woods, Richmond	Robert Nunez, Sacramento	Susan Porter, Pasadena
Nancy Hiestand, Davis	Robert Saunders, Sacramento	Susan Stuart, Santa Cruz
Nancy Schimmel, Berkeley	Roberta Stern, Oakland	Susie Hagemeister, Sebastopol
Navneet Virk, Los Angeles	Ronald Bogin, El Cerrito	Tamara Goldsmith, San Rafael
Nellie Thorngate, Santa Cruz	Rosa Flores, Sacramento	Terrie Green, Marin City
Nick Gaetano, Laguna Beach	Sabina Gonzalez, Fresno	Thomas Greenfield, Oakland
Nicole Lordi, Aptos	Sacramento	Toni Mayer, El Cerrito
Oscar Sandoval, Fresno	Salena Meade, Victorville	Toni Rango, Elk Grove
Paige Tengeluk	Samuel Durkin, Fairfield	Tracey Rattray, Oakland
Pam Letourneau, Rohnert Park	Sara Bernal, Woodland	Vanessa Spagnoli, Sacramento
Paola Ilescas, Vista	Sarah Carter, Newbury Park	Vasu Murti, Oakland
Pat Swan, San Francisco	Sarah Postma, Oakland	Verhan Henderson, Los Angeles
Patricia Alcocer, Salinas	Sarah Ross, Bayside	Veronica Shepard, San Francisco
Patricia Carlson	Sengrithey Pich, Brunswick	Vic Bostock, Altadena
Patricia Gutierrez, San Leandro	Serena Clayton, Oakland	Vikki Paulus, Long Beach
Patty Kestin, Los Angeles	Shani Buggs, PhD, MPH, Davis	Virginia Stewart-Carton,
Paula Shatkin, Occidental	Shannon Huddleston, Psy.D.	Warren M. Gold, MD
Pavitee Peumsang, Compton	Shannon Morgan, Newport Beach	Wendel Brunner, Berkeley
Peg Champion, Windsor	Shelly Collins, Davis	Wendy Krupnick, Santa Rosa
Peggy Rebol	Sherrill Futrell, Davis	Whitney Greswold, Richmond

Whitney Hall, Walnut Creek

Yanni Rho, MD, MPH, Concord

Zack Kaldveer, Oakland

Appendix E: Task Force Membership

CAEECC Members	Organization	Representative(s)
	3C-REN	Alejandra Tellez
	Association for Bay Area Governments	Jennifer Berg
	Code Cycle	Dan Suyeyasu
	Pacific Gas and Electric	Lucy Morris
	San Joaquin Valley Clean Energy Organizations	Kelsey Jones
	Southern California Edison	Christopher Malotte & Kellvin Anaya
	Small Business Utility Advocates	Ted Howard
	Southern California Regional Energy Network*	Lujuana Medina
Non-CAEECC Members	American Eco Services	Nicole Milner
	Silent Running LLC*	James Dodenhoff
Ex-Officio	California Public Utilities Commission (CPUC)*	Stephanie Green, Jesus Torres, & Nils Strindberg

** represents organizations that were a part of the predecessor Working Group, the CDEI Working Group.*

Initially, Annette Beital of Future Energy Enterprises, LLC was a member of the Task Force but due to unforeseen circumstances, stepped down after the first meeting.