

Environmental and Social Justice Engagement Action Plan



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Background

The California Energy Commission (CEC) and California Public Utilities Commission (CPUC) clearly articulated their commitment to energy equity in the 2019 Integrated Energy Policy Report (IEPR),¹ which dedicates a chapter to advancing energy equity. Content in the IEPR focuses on SB 350 implementation and does not include recommendations for building code development. However, the commitment that CEC and CPUC work collaboratively to ensure Environmental and Social Justice (ESJ)¹ communities do not disproportionately bear the burden of achieving climate and energy goals is relevant to building codes development. The CPUC's Environmental and Social Justice Action Plan² provides a roadmap to engage ESJ communities in CPUC's decision making and address energy inequities across California. The CPUC has not directed the Statewide CASE Team to pursue any specific activities related to energy equity for Codes and Standards (C&S), but the Statewide CASE Team is interested in proactively aligning with CPUC's ESJ goals.

The Statewide CASE Team has, with the assistance of Common Spark Consulting and Strategic Actions for a Just Economy (SAJE), compiled a strategy to engage and build trust and relationships with ESJ stakeholders. While this strategy is additive to the current Public Engagement Plan (PEP), the overarching objective is for this document to serve as a bridge to equitable

Environmental and Social Justice (ESJ) Communities

The California Public Utilities Commission (CPUC) defines ESJ communities as 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).

Source: <https://www.cpuc.ca.gov/news-and-updates/newsroom/environmental-and-social-justice-action-plan>

¹ The Statewide CASE Team is in the process of reviewing and developing terminology related to this topic. Currently under consideration is the term energy equity and environmental justice (EEEJ). Over time, vocabulary and definitions evolve as cultural and societal awareness shifts, including the priorities and requests of affected communities. This document will continue to be updated with the most applicable terms as they change.

² <https://www.cpuc.ca.gov/CPUCNewsDetail.aspx?id=6442461331>

engagement and facilitation, and eventually be integrated throughout the Statewide CASE Team’s engagement strategy. This document presents actions the Statewide CASE Team will take to begin developing relationships and pursuing long-term collaborative partnerships with ESJ stakeholders during the 2025 Title 24, Part 6 code cycle.

The Statewide CASE Team will be responsible for implementing the specific actions identified in the following sections. Some of the tasks already in process or planned for the 2025 cycle are shown in the table below:

Hired an ESJ Engagement Manager who joined at Statewide CASE Team in May 2022
Began a database of ESJ organizations
Drafted an Energy Codes PowerPoint presentation template for community-based organizations (CBOs) ³
Began creating training materials and resources
Dedicated a title24stakeholders website section to ESJ information
Began developing and maintaining stakeholder relationships

This ESJ stakeholder engagement effort provides a framework for CBO involvement. The framework will provide information for CBOs to decide if and how they can be involved further, with what measures, and to what extent.

Please provide feedback or questions to info@title24stakeholders.com.

³ DEFINITION OF COMMUNITY-BASED ORGANIZATIONS Decision 15-07-007, issued on July 23, 2015, defines a Community-Based Organization (CBO) as a “small, nongovernmental, California nonprofit corporation which itself directly serves individuals and families and which offers services to anyone who needs it without charge or at a minimal fee. The organization must offer services within a local geographic area in California and have a governing body drawn largely from the community it serves. Source: <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M216/K500/216500366.PDF>

Actions for the 2025 Energy Code Update Cycle

1. Dedicate Internal Leadership on ESJ Engagement

The Statewide CASE Team appointed a single, dedicated position, ESJ Engagement Manager⁴, to manage the ESJ engagement strategy for the 2025 code cycle. This person has prior experience working with ESJ communities and demonstrated cultural competency.

The ESJ Engagement Manager will lead, advise, and manage all aspects of ESJ Engagement as outlined in this Action Plan. The ESJ Engagement Manager started in May 2022, however several tasks, specifically parts of Task 2 and Task 4 below, were previously underway by the Coordination Team.

Outcome:

A dedicated point person for ESJ Engagement

2. Assess Impacts and Stakeholder Landscape

To fully address the equity and accessibility implications of the codes and standards engagement strategy, an assessment on the codes and standards impact to ESJ communities is needed. The ESJ Engagement Manager will lead this research by identifying priority communities and stakeholders (and the criteria behind those priorities), scoping research around the impacts likely to intersect with these communities and assessing the level of risk to each stakeholder. Specifically, this task will include the following actionable items:

2.1 Identify and Define Stakeholders

- Identify CBOs, nonprofits, and other organizations that work with the aforementioned ESJ communities. Especially consider membership-based organizations
- Define what criteria makes the previously identified groups “stakeholders”
- Define what power each of these stakeholders *may* have to **influence** the codes process
- Define how ESJ stakeholders could engage in the building codes update process, what are the objectives/outcomes for stakeholder engagement, and how much power will stakeholders have in the codes process — that is, will their time/effort result in change?

⁴ Title can be revised as needed. This role reports to the Coordination Team but support the entire Statewide CASE Team.

Outcome:

- Defined ESJ Stakeholder Criteria
- Robust ESJ Stakeholder database
- List of possible influences these stakeholders might have
- List of possible actions these stakeholders could take

2.2 Identify Potential Impacts On Each Stakeholder⁵

- Conduct research of possible unintended consequences of the code and code changes, engagement with the process, etc. (in-house or contracted out)
 - Conduct literature review of relevant sources to accompany/complement engagement research. Focus on how electrification and decarbonization specifically may impact ESJ communities.
- Develop a key findings report, slide deck, or material to incorporate into the workshop presentation to ESJ community members, CBOs that serve ESJ communities and other relevant stakeholders or decision makers (workshop developed in Task 5)

Outcome:

- Outreach materials including questionnaires and survey instruments
- Materials for ESJ webpage (webpage created in Task 4) such as:
 - Report on literature review
 - Key findings report
 - Presentation of findings
 - Created CBO questionnaires and surveys
 - Outreach materials, talking points for CBOs serving ESJ communities

3. Initial Outreach to ESJ Community-Based Organizations

The ESJ Engagement Manager will lead an effort to reach out to and develop relationships with ESJ community stakeholders and organizations, specifically starting with CBOs, as they are most directly involved with and trusted by community members in their respective communities. The ESJ Engagement Manager will leverage existing networks (e.g., existing utility CBO networks/relationships, the California Healthy Housing, and the California Environmental Justice Alliance) as a starting point to contact CBOs with an existing interest in low-income communities, the environment, tenant impacts, affordable housing, or building codes. The ESJ Manager will schedule and host one on one meetings to learn about CBOs, how they are organized and what

⁵ Oral history and direct feedback from stakeholders will be collected to understand impacts from a first-person perspective once the engagement model has been established (Task 5).

their priorities are, and to provide information so these CBOs can determine if and how Title 24 might be an issue of interest or concern for their advocacy.

Using materials and knowledge base developed in Task 2, work with stakeholders to identify, scope, and design further needed research.

Deliverables:

- Outreach to CBOs
- Realtime Documentation (RTD) and engagement notes
- Report on survey(s)
- Monthly report on outreach

4. Co-Develop Community Engagement Strategies

We expect our outreach to be directed to CBO's that meet the criteria as determined in Section 2.1 as well as the following criteria:

- is interested,
- is motivated,
- has the capacity to engage with the Statewide CASE Team,
- and requests or recommends direct engagement with community members

The Statewide CASE Team will work with the identified CBOs, co-develop⁶ a strategy, and plan for engaging community members. The Statewide CASE Team will provide honorarium for all CBO participants and intellectual property (meaning, not just their time), determined by the ESJ Engagement Manager and engaged CBOs. In support of such a relationship, the Statewide CASE Team might consider:

- The formation of an advisory committee for CBOs to work together with the Statewide CASE Team on direct engagement with community members. The advisory committee members will be compensated for their time and leadership and serve as the approving body for any direct engagement strategies in their communities.
- A contract(s) for CBO outreach on behalf of the Statewide CASE Team, allowing the CBO to determine the best ways to reach its community members, and being compensated for those direct engagement activities. Many CBOs are well-versed in educational presentations, ongoing direct engagement with community members, translating technical terms to relevant day-to-day issues, running focus

⁶ Co-develop means brainstorming, developing, and refining ideas together, and making decisions collaboratively to ensure an engagement plan fits the needs of community members. Co-development enables the partnered CBOs to share ownership and decision-making with the Statewide CASE Team. This process will likely require the Statewide CASE Team to depart from its typical engagement activities and spend more resources than usual for a specific segment of stakeholders or community members.

groups, and conducting surveys across audiences with diverse technical capabilities.

4.1 Co-Develop Content and Materials

The Statewide CASE Team and the ESJ Engagement Manager will offer support for and be available to CBOs in the co-development process, including content in the form of curriculum, presentations, or other materials to reach the communities the CBOs serve. CBO staff will know best how to communicate information to their members. The curriculum will be developed in collaboration with CBOs whether as lead developers or consultants (the specific role will be established through the contract development). The material will seek to incorporate information directly from stakeholders about how they do or don't experience power to influence.

The curriculum, presentations, or other materials will build awareness in ESJ communities on what the building codes and Title 24 are, as well as summarize outcomes identified as unintended consequences thus far for the participating audience. The latter subject will provide context of the building codes to the specified audience and will help the audience determine the prioritization of Title 24 engagement. Engagement will be tailored to each unique CBO (e.g., affordable housing developers and tenants' rights group would not be given the same presentation), and content will adopt the following practices:

- Provide general educational material about energy codes for context setting. One example will be structured as an "Energy and Codes 101", an introductory presentation template to the CASE team for CBO outreach and engagement. This presentation helps to set the foundation of the codes and standards process as well as answer any questions the community may have. Upon delivery of the presentation, Common Spark noted that each community needs differ, and while this may be one version of this presentation, local CBOs should be consulted to modify and adapt the presentation as needed to align to community priorities.
- Provide necessary background information or context, including political context, policy processes, and stakeholder input processes.
- Explain the likely or potential unintended consequences and benefits identified through research or discussions.
- Be simple, jargon-free, and not overly technical
- Use real life examples that are relevant, relatable, and timely
- Combine the use of images and text for multiple mechanisms for comprehension
- Demonstrate and narrate multiple scenarios
- Be available in multiple languages, as needed
- Be interactive
- Develop a public facing version of the PEP for title24stakeholders.com

If or when desired by the stakeholders, support and resources will be provided to engage in codes and standards advocacy. The type, scope, and nature of such resources will be co-determined with partnered CBOs.

Outcome:

Resources for title24stakeholders.com in multiple languages, such as

- Create a webpage for CBOs containing resources such as:
 - Public facing PEP
 - Various Energy Codes 101 presentation slides, webinar recordings, etc.
 - Infographic(s)

5. Engage ESJ Communities and Members

Outreach to ESJ communities may be challenging for multiple reasons. Collaboration with CBOs can help increase effectiveness of outreach. Keep in mind the limitations of certain audiences:

Communication and technical accessibility

- Low-income stakeholders can be difficult to contact without an existing communication framework or set of contacts, thus working with CBOs with existing relationships will be key.
- Due to housing and employment precarity, this population is highly mobile, relies on mobile phones for communication more than computers or landlines or snail mail, and may also have limited digital literacy.
- Some stakeholders may have Limited English Proficiency (LEP) and may read at, or below, a fifth-grade reading level and many may prefer to communicate in languages other than English.

Capacity in terms of time and resources

- Some community members may have limited time around work and family obligations to devote to learning a new issue. Low-income community members often have shift schedules around the clock and family members may be working overtime or for two jobs.
- Community members with families with young children may not have access to childcare or the resources for it to attend a meeting or presentation.
- To increase participation, access, and community involvement, consider offering compensation in the form of money or Visa gift cards. While local gift cards help serve local businesses, consider gift cards that can be used for a diverse set of needs. CBOs could also accept direct donations.
- When hosting in-person events or conversations in the community, host it at a place recognized as a community hub that community members would be

familiar with and trust. This could be at a neighborhood recreation center or at a CBO office. Even virtual events hosted locally could feel closer and more familiar than a virtual event hosted from further away.

- In addition, consider offering food, childcare reimbursement, and transportation reimbursements, or transit passes or rideshare vouchers upfront rather than in the form of reimbursement for stakeholders to fully participate and have access to in-person meetings.

Trust

- Members of ESJ Communities may have experienced prior outreach from public policy or government related initiatives that resulted in harm to themselves, their communities, or community members and may not trust getting involved in another process. Note: While these groups or individuals may not participate initially, they will likely observe or hear from others how it goes elsewhere, which may determine future participation.
- Personalized invitations, such as a direct phone call from a CBO staff person, can provide a more successful way to engage a community member than email or social media campaigns, because some community members cannot be reached through digital channels. Moreover, CBOs will have a better understanding of which of their community members would be able or willing to attend.
- Creating a social media and email campaign toolkit for CBOs to use for their direct outreach can be productive.

Additional Considerations about Engagement Approaches

Engagement should be flexible on format and accessibility to provide the most relevant and appropriate experience for participants and feedback for the Statewide CASE Team. Leadership and support from CBO staff will increase success of a given event. In particular, the following processes and considerations can increase engagement:

Recommended formats are listed below. Note that personalized, smaller events should be prioritized over larger webinar-style presentations and that receiving meaningful feedback will be dependent on how information is conveyed to community members.

- One-on-one phone calls/in-person conversations or semi-structured interviews
- Small in-person focus groups (5-10 people)
- Semi-structured interviews
- Larger Presentation + Survey (25-50 people)
- Host events in the primary language of the participants rather than through interpretation
- Host local events in-person rather than virtually to take into consideration the digital literacy of participants and their access to digital platforms and technology.
- Maintain COVID-19 protocols for all in-person events
- Develop strategies, not only for ADA but Access and Functional Needs (AFN) solutions

Outcome:

Schedule and deliver co-developed webinars/workshops (created in Task 4) and in-person engagement meetings with CBOs

6. Continually Evaluate and Build Upon ESJ Engagement

The Statewide CASE Team will officially release a report, slide deck, or material that highlights the engagement of ESJ communities throughout the stakeholder process and code cycle. Details would include:

- Synthesized information highlighting quantitative and qualitative findings of engagement participation, including but not limited to number of CBOs reached, percentage of CBOs engaged and contracted, languages supported, number of ESJ meetings or events held, CBO satisfaction with engagement, other qualitative metrics of successful engagement as determined collaboratively with CBOs prior to hosting events.
- Steps taken to invest in, and enhance ESJ engagement, outreach, and prioritization in the codes and standards stakeholder engagement process.
- A section highlighting research conducted on any identified unintended consequences of updates to Title 24, Part 6. This section will reflect research conducted in the field through interviews and ethnographic approaches as well as through data analysis. The section will inform both the public, the CEC, and the Statewide CASE team, of associated risks historically seen with Title 24, Part 6 updates, as well as models anticipating potential consequences.
- Additional learnings and recommendations for the future code cycle(s).

The report, slide deck, or material will be publicly published for decision makers, stakeholders, and the public to reflect on the engagement of and considerations for ESJ communities. The report would include the research, integration of ESJ engagement strategies, and other outreach completed from the prior code cycle. Such a timeline allows the process to provide continual feedback and input to benefit the process.

All materials and reports will be drafted for Statewide CASE Team utility's review before finalizing.

Outcome:

Survey instruments for evaluating all engagement activities including but not limited to:

- The evaluation of the title24stakeholders.com CBO webpage
- 3rd party evaluations or other means for CBOs to evaluate the Statewide CASE Team efforts anonymously
- Monthly reports on evaluation survey results
- Annual reports.