Codes and Standards Enhancement (CASE) Initiative

2025 California Energy Code

Public Engagement Plan

This report was prepared by the California Statewide Codes and Standards Enhancement (CASE) Program that is funded, in part, by California utility customers under the auspices of the California Public Utilities Commission.

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Executive Summary

This Public Engagement Plan (PEP) details how the Statewide Utility Codes and Standards Enhancement (CASE) Team will engage with stakeholders throughout the 2025 code cycle to facilitate the identification of challenges early and to arrive at code change proposals that are ready for adoption. The Statewide CASE Team aims to engage stakeholders representing everyone affected by building codes and ensure processes exist to verify a variety of stakeholder engagement metrics, ensure equitable stakeholder representation, continuously analyze gaps, and iterate to improve outreach processes.

This PEP provides all individuals who will be representing the Statewide CASE Team with guidance and expectations for interacting with stakeholders and how to appropriately document those interactions to successfully engage with stakeholders during the 2025 code cycle.

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

1. Introduction

1.1 Review of the Statewide Utility Codes & Standards Team's Role in Building Code Advocacy

The CASE initiative presents recommendations to support the CEC's efforts to update the California Energy Code (Title 24, Part 6) and the energy efficiency provisions in the California Green Building Standards (Title 24, Part 11, or CALGreen) to include new requirements or to upgrade existing requirements for various technologies. Three California Investor-Owned Utilities – Pacific Gas and Electric Company, San Diego Gas and Electric, and Southern California Edison – and Los Angeles Department of Water and Power and Sacramento Municipal Utility District sponsor activities for the 2025 code cycle. **The program goal is to prepare and submit proposals that will result in cost-effective enhancements to improve energy efficiency and energy performance in California buildings**. The CEC evaluates these proposals as well as others submitted by other stakeholders and may revise or reject proposals. The Statewide CASE Team provides additional recommendations and supports to the CEC following the proposal submission, and throughout the code cycle.

1.2 Team Member Terminology

The Statewide CASE Team has a number of groups and subgroups, so it is important to be aligned on team terminology. See below in **Error! Reference source not found.**1 for terminology used in this document, as well as other written and verbal communications.

Table 1: Team Member Terminology

Term	Abbreviation	Definition
Statewide Utility Codes & Standards Program	N/A	The Statewide Utility Codes & Standards Program, referring to all involved parties
Statewide Codes & Standards Utilities	Utilities or Utility Team	The utilities involved in the Codes & Standards Program
Statewide Utility Codes & Standards Team	Statewide CASE Team	Utility Codes & Standards Staff and consultants
Statewide Utility Codes & Standards Lead(s)	Utility Lead(s)	Primary points of contact for each utility for the Title 24 process
Statewide Utility Codes & Standards Measure Lead(s)	Utility Measure Lead(s)	Points of contact for each utility for each CASE Measure
Code & Standards Enhancement Author(s)	CASE Author(s)	Author(s) of each CASE Report

Statewide Utility Codes & Standards Coordination Team	CT	Manages coordination of overall program and subcontractors

1.3 Objectives of Public Engagement Plan

Collaborating with stakeholders, further identified in Section 1.5, who might be impacted by proposed changes to the building code, is a critical aspect of the Statewide CASE Team's efforts to develop and refine code change proposals. Public stakeholders provide data to support analyses that are included in CASE Reports, provide valuable feedback on draft analyses, and help identify and address challenges to adoption (e.g., cost effectiveness, market barriers, technical barriers, compliance and enforcement challenges, or potential impacts on human health or the environment). If proposals that the Statewide CASE Team submits to the CEC for consideration are generally supported by all or most stakeholders, then the CEC staff do not have to commit as many staff resources to research public concerns, resolve conflicting claims, or develop compromise proposals before code changes can be adopted. Reducing the CEC resources required for each code change proposal can ultimately lead to more changes being adopted during each code cycle and California making more progress towards long-term energy goals. The Statewide CASE Team aims to engage stakeholders representing everyone affected by building codes and ensure processes exist to verify a variety of stakeholder engagement metrics, ensure equitable stakeholder representation, continuously analyze gaps, and iterate to improve outreach processes. Working collaboratively with stakeholders is critical for the development of proposals that have widespread support.

This PEP details how the Statewide CASE Team engages with stakeholders throughout the code cycle to facilitate the identification of challenges early. It also provides guidance on how to interact with stakeholders in ways that build collaborative and productive professional relationships with the public. This document also begins to detail how to document interactions with stakeholders to document advocacy activities during the 2025 code cycle.

The specific objectives of this PEP are to provide documentation of the Statewide CASE Team's:

1. Strategies and processes to engage stakeholders throughout the 2025 code cycle to encourage productive collaboration
2. Standardized approach to data collection to result in high quality and unbiased data
3. Guidance to all individuals who will be representing the Statewide CASE Team on how to engage with external stakeholders to establish an inclusive, accessible, and accommodating culture for receiving input

4. Protocols for documenting engagement with stakeholders
5. Metrics, both quantitative and qualitative, to assess the success of public engagement in the 2025 code cycle.

This plan addresses how stakeholders can participate in each stage of the code cycle including, but not limited to:

1. Measure identification and prioritization
2. Data collection to support Statewide CASE Team analyses
3. Public utility-sponsored stakeholder meetings
4. Direct communication with CASE Authors throughout code cycle
5. Draft code language review
6. Draft CASE Report review
7. Public workshops hosted by the CEC
8. Reviews of CEC documents including: draft code language, staff reports, notice of proposed rulemaking, initial statement of reason, compliance manuals, Alternative Calculation Method (ACM) Reference Manuals, and compliance software
9. Submitting written comments to the CEC
10. Working directly with CEC staff

The Statewide CASE Team will be using the following methods to communicate with stakeholders, with more details outlined in the sections below:

1. Measure-specific project materials released for public review
2. Statewide CASE Team's website: title24stakeholders.com
3. Email marketing campaigns sent to listserv
4. Individual emails from CASE Authors to stakeholders
5. Public stakeholder meetings (in person or via phone)
6. Individual meetings (in person or via phone)
7. Surveys and focus groups
8. Social media

1.4 Stakeholder Engagement Tracker/Process

A stakeholder engagement tracking process will be used to optimize coordination and enable documentation of stakeholder correspondence so that the Statewide CASE

Team can readily know which stakeholders have been and need to be reached. Information will be collected on who was engaged, which representations, and what, if any representations were over or underrepresented. Here is the draft list of characteristics that will be logged following communications with individual stakeholders, including but not limited to:

- Name
- Date
- Organization
- Stakeholder category
- Proposed measure(s) in question
- Level of support/position for the proposed measure in question (ranked as 1-5, strongly opposed – strongly in favor, and Unknown)
- Last date of contact
- Methods of contact (i.e., which 'Platform' was being used to engage the stakeholder); and
- Resource notes (i.e., text entry regarding resources available for Statewide CASE Team, resources needed to participate/engage such as funding or information)
- Next steps

1.5 Stakeholders Included in PEP

This PEP addresses how the Statewide CASE Team will engage with all public stakeholders that might be impacted by a proposed code change. The Statewide CASE Team will identify all groups and individuals that should be included in outreach activities for each CASE measure. The following are types of stakeholder groups that will be included in outreach activities, but we expect additional stakeholders or stakeholder groups will be identified as the Statewide CASE Team develops measure-specific plans and CASE Reports:

- Acceptance Test Technicians (ATTs)
- Architects
- Academic institutions
- Builders and remodelers
- Building officials
- Building owners
- Building occupants
    - Owners
    - Tenants
- Building operators

- Contractors (general contractors, installation contractors (mechanical, lighting, plumbing, etc.), local and/or regional groups)
- Compliance software vendors
- Community-based organizations
- Designers (mechanical, lighting, plumbing, etc.)
- Developers (representing a variety of geographic locations throughout the state)
    - Affordable Housing Developers
    - Market Rate Developers
- Energy and environmental consultants who are not members of the Statewide CASE Team
- Environmental advocates
- Home Energy Rating System (HERS) Raters
- Housing advocates
- Industry associations
- Lobbyists
- Local governments
- Manufacturers
- National laboratories
- Regional energy efficiency alliances (e.g., BayRen, Northwest Energy Efficiency Alliance, Southwest Energy Efficiency Project)
- Social justice community organizations/representatives, see Section 1.7below
    - Cal Enviro Screen communities
- Compliance consultants
- Trade associations
- Union representatives
- Utilities outside of California

This plan intentionally does not address how the Statewide CASE Team will engage with the groups identified in the list below. The strategy to address these groups will be addressed separately.

- State agencies, including but not limited to:
    - California Energy Commission (CEC)
        - Building Standards Office (BSO)
        - Compliance Standards Office (SCO)
    - California Public Utilities Commission (CPUC)
    - California Building Standards Commission (BSC)
    - California Department of Housing and Community Development (HCD)
    - Department of Health Care Access and Information (HCAI)
    - California Office of the State Fire Marshal
    - California Air Resources Board

- Members of the Utility Staff who work outside of the Statewide Utility Codes and Standards Team.

If you have recommendations for stakeholders that should be included in this list please reach out to info@title24stakeholders.com.

1.6 Key Stakeholders

Key Stakeholders are defined as specific individuals, organizations, or companies that will most likely have feedback on multiple measures or high priority measures or will require a coordinated effort to manage that engagement from the Coordination Team. These are developed by looking at active stakeholders in previous code cycles as well as stakeholders who might be new to the code process. Key Stakeholders can be adjusted throughout a code cycle depending on the level of activity. All Key Stakeholders will have a designated lead(s)[1] from the Coordination Team who is responsible for managing relationships and communications between the stakeholder and the Statewide CASE Team. Key Stakeholders could be in support of, or opposed to, our measures and all feedback is valuable.

Starting with the 2025 cycle, Key Stakeholders will be categorized into three groups:

Group 1: Existing Stakeholders

Group 1 is made up of stakeholders who have been involved in the code process in past cycles and have history of engagement. These stakeholders might be interested in multiple measures and could benefit from the Coordination Team's support across multiple measures and teams.

Group 2: New Stakeholders

Group 2 is made up of stakeholders who may be new to the code change process, as individuals or as in a new organization, and have expressed interest. These stakeholders may have submitted a new measure idea for the first time or reached out separately. Depending on the number of new stakeholders, attention might be given to stakeholders with an interest in more contentious measure topics.

Group 3: Prospective Stakeholders

Group 3 is made up of stakeholders who have been flagged as needing to be engaged but have not historically been or there are little or no existing relationships, such as architects, building officials and trade organizations.

[1] Will be assigned when measures are approved

1.7 Environmental and Social Justice in Code Development

For the 2025 Title 24 code cycle and beyond, the Statewide CASE Team seeks to prioritize environmental and social justice (ESJ)[2] in the code development process by improving engagement with ESJ communities throughout the code development cycle to better capture benefits for these communities and avoid unintended consequences of code changes. Table 2 highlights tasks and responsible party:

Table 2: ESJ Tasks and Support

Task	Responsible	
	Coordination Team	**CASE Authors**
Cultivating new relationships with ESJ organizations and communities	Lead for establishing new relationships	If CASE Authors identify new ESJ organizations or communities required for engagement, Coordination Team should be flagged to support and lead introductions.
Strengthening and maintaining existing relationships with ESJ organizations and communities	Lead for maintaining existing relationships	If CASE Authors have existing relationships, can continue but flag/coordinate with Coordination Team.
Tailoring our approach to engagement with ESJ stakeholders	Lead responsible for: Determining how, when, who to initiate outreach (ex: direct outreach campaigns vs hosting webinars) Communicate approach to CASE Authors as needed	Work with Coordination Team to provide feedback on engagement approach
Integrate the input and feedback from ESJ stakeholders into CASE Reports and/or presentations	Coordination Team and ESJ Team communicate approach to CASE Authors as needed and review CASE reports and presentations as needed.	CASE Authors integrate input into CASE Reports and/or presentations

1.8 ESJ Action Plan

To move the previously mentioned objectives forward, the Coordination Team worked with Common Spark Consulting, Inc to develop an ESJ Action Plan. The ESJ Action Plan presents a strategy to engage and build trust and relationships with ESJ stakeholders. The overarching objective is to serve as a bridge to equitable engagement and facilitation, and eventually be integrated throughout the Statewide CASE Team's engagement strategy.

[2] 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.

The 2025 Title 24 Coordination Team will be responsible for implementing the specific actions identified in the Action Plan. The long-term vision is to establish strong, productive relationships with ESJ organizations that are actively participating in the code development process such that it is continually improved to provide benefits to ESJ communities. Supplementary processes will complement the 2025 code cycle process to determine how to better engage the code-development cycle with the priorities of ESJ organizations.

The Coordination Team will work with ESJ organizations to understand ESJ communities' priorities related to the built environment and how to engage these communities to support measure development in the code development process. See also ESJ Action Plan for more on how ESJ input and considerations will be valued.

2. Communications Protocol

2.1 Objectives

The purpose of the Communications Protocol is to guide CASE Authors in delivering clear and consistent messaging to all parties external to the Statewide CASE Team including various groups within each utility's Codes and Standards Team, the CEC, and all other stakeholders. Stakeholders include any person or entity that can impact or be affected by the outcome of the 2025 codes cycle, such as manufacturers, design firms, industry associations, building officials, professional associations, small businesses individual professionals, tenants, ESJ communities and non-profits (see complete list in Section 1.5).

Each CASE Author's role is integral to the successful adoption of the proposed standards. Not only are they conducting the analyses and drafting the CASE Report, but they are also usually a stakeholder's main point of contact with the Statewide CASE Team. They are often the first person that speaks to a stakeholder about the proposed code change. This means that they can set the stage for a successful collaborative effort throughout the code development process. It is critical that the message they deliver is clear and the information they provide about the code development process is consistent with the message other CASE Authors are providing during their outreach efforts. To effectively and appropriately reach out to stakeholders, the Coordination Team has developed this Communications Protocol.

2.2 Voice and Tone Guidelines for Stakeholder Engagement

How we convey information is often just as critical as the information itself. To effectively build lasting relationships and communicate with stakeholders, outreach messaging will depend on the audience and forum for communication. All messaging, regardless of the audience, should generally adhere to the tonal adjectives below:

- Welcoming
- Succinct
- Factual
- Relevant
- Interactive
- Collaborative
- Informative
- Accountable
- Transparent

2.3 Documentation Requirements

For CASE Authors, all correspondence (e.g., emails, call/meeting notes etc.) must be documented and collected for evaluation purposes. This evaluation, assessing years of advocacy, will impact the future of the Statewide Utility Codes and Standards Program and is a critical component to the code effort.

2.4 Introductions as Representing the Statewide Utility Codes & Standards Team

CASE Authors are responsible for introducing themselves as part of the Statewide CASE Team and explain our role and the greater Title 24, Part 6 code process.

2.5 Use of Statewide Utility Codes & Standards Team Program Branding

Documents that are sent to stakeholders external to the Statewide Utility Codes & Standards Team must use the approved Statewide Utility Codes & Standards Team branding. This includes all agendas and notes for meetings with stakeholders, memos, survey documents, etc.. Using the Statewide Utility Codes & Standards Program branding in documents that are distributed to external stakeholders is critical because it conveys that the work is being coordinated. The Coordination Team oversees all correspondence including:

- Meeting agendas
- Meeting notes (both draft and revised based on stakeholder feedback and confirmation. Using nomenclature "stakeholder reviewed and approved" to indicate that the notes were accurately captured)
- Meeting PowerPoint presentations
- Comment letters
- Memos
- CASE Reports

2.6 Collecting and Handling Sensitive or Confidential Information

The Statewide Utility Codes and Standards Program may receive or collect stakeholder information that is considered sensitive by the owner. We protect any and all information as requested by the stakeholder.

3. Meeting Guidelines and Best Practices

This section establishes guidelines so the Statewide CASE Team can host productive meetings throughout the 2025 code cycle. These guidelines are relevant to all non-public meetings including, but not limited to meetings:

- Among members of the Statewide CASE Team,
- Between the Statewide CASE Team and the CEC, and
- With public stakeholders.

These guidelines do not apply to utility-sponsored stakeholder meetings, which are open to the public.

3.1 Best Practices for All Meetings

Preparation (prior to meeting):

1. To limit the number of meetings, only hold meetings when they are necessary (ex: ask individuals teams if something can resolve just as well via email or if a meeting is necessary or would support greater understanding);
2. Only invite individuals that are crucial for meeting discussions and outcomes. Include team members as optional if possible (remember to Cc according to guidelines;
3. The meeting host should develop and distribute the agenda with conference line and screen sharing (if applicable) to all meeting participants in advance of the meeting – best practice is at least 24 hours in advance;
    a. Meeting host should either attach agenda to calendar invite or update calendar invite with agenda, plus include a link if available on SharePoint.
4. In development of the agenda, the meeting host should:
    a. Include the meeting objective(s), with items that are action oriented;
    b. Assign host/facilitator, timekeeper and note taker (different individuals where possible);
    c. Allocate appropriate time and assign leads for each item. If not possible in advance; these assignments can be determined at the start of the meeting; and
    d. Include at least five minutes at the beginning for roll call and to review the agenda and at least five minutes at the end to review notes, next steps and action items.

5. Meeting host should open the conference call line and screen sharing site at least five minutes before the meeting starts. Meeting hosts should ensure that materials are ready for screen share and/or screen is clear of non-meeting related materials that can be distracting.

Implementation (during meeting):

1. All meeting participants should arrive in the meeting on time whenever possible; at meeting commencement, the host/facilitator should review the whole agenda, ask participants for an additions or modifications, and assign roles, if applicable
2. All meeting participants should be aware of the time allocation for each agenda topic and aim to help the meeting stay on time, with timekeeper supporting
3. Host/facilitator should guide each topic lead towards identifying agreements and action items by the end of each topic's allocated time
4. If you arrive to a meeting late after rollcall has been completed, announce your attendance at a reasonable break or otherwise inform the meeting host that you have joined the meeting
5. At the end of the meeting, host/facilitator shall review next steps and action items

Follow up:

1. Meeting host will collect meeting notes from note taker and distribute them to all meeting participants after the meeting.

3.2 Specific Guidance for Agendas and Notes for Statewide CASE Team Meetings

Many individuals will be hosting meetings on behalf of the Statewide CASE Team throughout the code cycle. Although many individuals will be hosting, the goal is for all meetings to maintain a level of continuity and professionalism. Among several benefits, this will help meeting participants know what to expect when meeting with the Statewide CASE Team.

Apart from following the best practices detailed in Section 2, the Statewide CASE Team will use standardized templates for meeting agendas and notes for meetings and follow the schedules suggested for distributing notes and agendas.

3.3 Objectives of Email Protocol

Individualized emails serve multiple purposes for stakeholder engagement, including following up on the listserv notifications to confirm receipt of when the platform shows the email has been unopened, confirmation of planned meeting attendance for key stakeholders, obtaining feedback and working through issues regarding the code change proposals. Email is also an excellent way to track stakeholder engagement, but not the only metric used to analyze engagement.

3.4 Measuring Success of Email Outreach

The Statewide Utility Codes & Standards Team will use title24stakeholders.com metrics to evaluate the success of this PEP throughout the code cycle. In addition to communicating information from the website, it is also important to communicate outside information (i.e., CEC announcements) to drive people to the website as well. Integrated analytics will be crucial to easily identify which pieces of the public outreach campaign are successful, although campaign success will not be determined solely through this metric. Metrics that will be collected and monitored on a monthly basis include:

- Documents released for public review on time
- Quantity and quality of feedback (i.e., Does feedback reflect an open accessible process with informed stakeholders?)
- Documents meet quality expectations
- Browsers used to access the website
- Devices used to access the website (i.e., smartphone vs computer)
- Total visitors to the website
- Total new visitors to the website (and when)
- Means of site entry
- Search terms for site entry
- Top page visits
- General geographic location of visitors
- Combined analytics (i.e., Listserv communications that translate into page views, etc.)

Metrics will be cross analyzed to identify stakeholder engagement and website engagement to further evaluate the outreach potential and success of the website. Gaps identified through this cross-analysis will help inform the public outreach campaign efforts.

4. Measure-Specific Project Milestones

4.1 Objectives

Throughout the code cycle, the Statewide CASE Team will release documents for public review. There will be an announcement when documents are released containing a short of each document. These formal documents convey detailed information about code change proposals and support analyses and solicit feedback from stakeholders. Giving stakeholders an opportunity to provide feedback multiple times throughout the code development cycle can help strengthen and garner support for proposals, particularly if CASE Authors receive feedback and are willing to work collaboratively with commenters to reach common ground and incorporate that feedback directly. The formal documentation also creates a clear record of the feedback and when it was provided to the Statewide CASE Team. Feedback should be as documented verbatim, in the words of the stakeholder providing the feedback. Stakeholders should be encouraged to be specific and provide solutions and language suggestions when appropriate. Included in this record is a note of how each feedback was incorporated, or if not, why it was not incorporated. This creates a clear record so that stakeholders and the Statewide CASE Team have a transparent way to communicate with one another and each can learn from the other about how the process is working or not.

Documents that will be released for public review include, but may not be limited to:

- Draft CASE Reports
- Final CASE Reports
- Draft code language (released multiple times throughout code cycle)
- Presentations from utility-sponsored stakeholder meetings
- Agendas and notes from utility-sponsored stakeholder meetings
- Docketed comments (might not apply to all measures).

Please see Figure 1 for a chart view of the CEC and Statewide CASE Team's milestones for the 2025 code cycle.

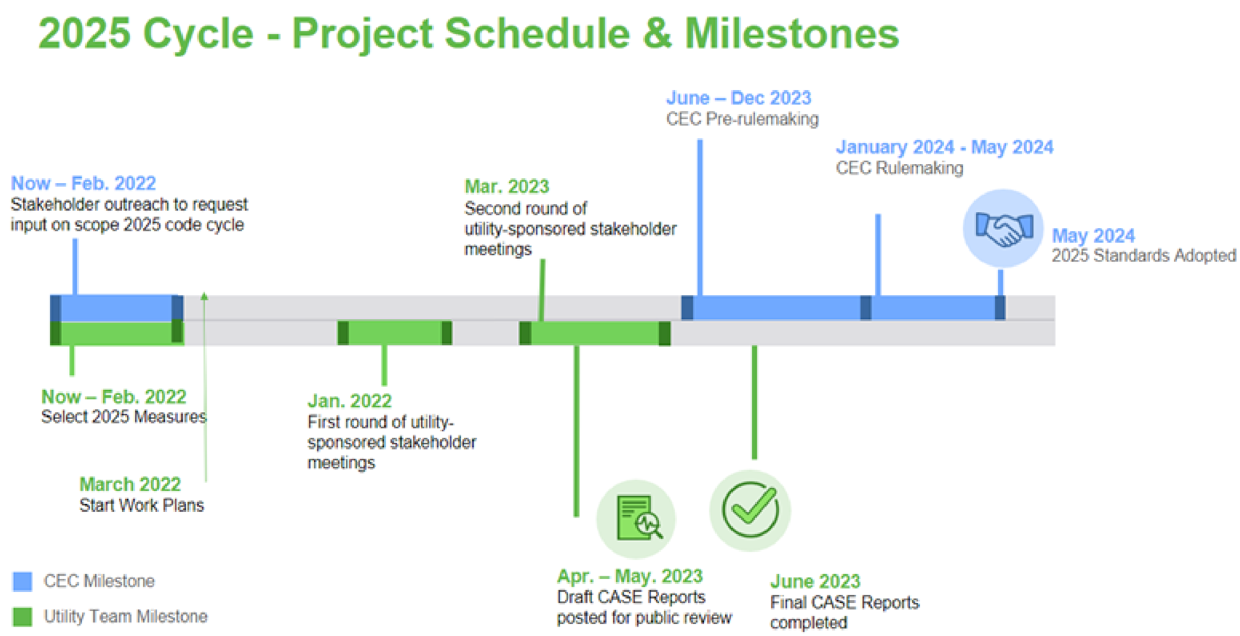

Figure 1: 2025 Cycle Project Schedule and Milestones

5. Utility-sponsored Stakeholder Meetings

5.1 Objectives

Utility-sponsored stakeholder meetings provide an opportunity for anybody who is interested to learn about the code development process, the Statewide CASE Team's role in the advocacy effort with the CEC, provide transparency, and the specific code change proposals that the Statewide CASE Team is pursuing for the 2025 code cycle. The Statewide CASE Team will be asking for feedback on proposed code changes, draft code language, draft assumptions and results for analyses that will be presented in CASE Reports, data to support assumptions, thoughts on compliance and enforcement, thoughts on technical and market feasibly, and general considerations for each code change proposal. The goal of stakeholder meetings is to solicit input on proposals early enough so when submitting Draft and Final CASE Reports to the CEC, the proposals and the supporting analyses are vetted and have as few outstanding issues as possible. The aim for meetings is to be interactive, collaborative and accessible.

5.2 Implementation

It is anticipated that two rounds of utility-sponsored stakeholder meetings will be held with supplemental meetings to support increased public engagement from prioritized organizations. Some of the key elements of a successful meeting include:

- Work with Utility Leads and CEC staff to develop an introduction presentation that describes the Statewide CASE Team's role in the code development process and the CEC's roles and responsibilities in the process.
- Work with Utility Leads and CEC Staff to develop templates for measure-specific presentations.
- Hold calls with the CEC Staff in advance of public meetings to discuss proposals and address the CEC's questions and concerns in advance of presenting publicly.
- Establish meeting groups such that CASE measures relevant to similar audiences are discussed in the same meeting for example: nonresidential lighting measures may be relevant to multifamily and single family concerned audiences.
- Ask Utility Leads, CEC Staff, and CASE Authors for input on meeting invitees at least eight weeks in advance of meeting.

- Develop a calendar of industry events that are occurring around the same time of stakeholder meetings and plan meetings for times when stakeholders can attend.
- Provide stakeholders with sufficient notice of meetings
- Provide meeting materials to stakeholders at least one week in advance of the meeting via email and website
- Send an email with meeting notes to all stakeholders within two weeks of the meeting, inviting any corrections to the record.

For the 2025 code cycle, all utility-sponsored stakeholder meetings will be web-based events. The Coordination Team will provide a tutorial for using the webinar platform in all event reminder emails and on website announcement/event page. The first round, will be held in January 2023 and might consist of five or six meetings. The second, likely smaller round, will be help in the spring of 2023.

5.3 Measuring Success

The Statewide CASE Team will measure success in the following ways:

- Key Stakeholders attended the meeting.
- Information was presented clearly and concisely.
- The Statewide CASE Team provided stakeholders with multiple opportunities to provide feedback before, during, and after the meeting (e.g., verbal comments, chatting comments, providing input via email or phone conversations with CASE Authors, participation in polls).
- The Statewide CASE Team reports on how previously provided feedback was or was not incorporated and why. (Can be during the meetings, or in a documented report-out as follow-up).
- Meeting materials were made available at least a week in advance of meetings.
- Meeting notes were made available within two weeks of each meeting.

6. Individualized Meetings

6.1 Objectives

Individualized meetings are important for relationship building with stakeholders and working through issues regarding the code change proposals.

6.2 Implementation Strategy

When speaking with stakeholders over the phone or in person, please remember that we are representing the Statewide Utility Codes & Standards Team. It should be clear to the stakeholder that we are working on behalf of the Statewide Utility Codes & Standards Team.

For documentation, for each phone call and phone meeting it is important that we take the following documentation steps:

- Send an initial email requesting and/or scheduling a meeting. and notify the stakeholder that the conversation will be documented, and stakeholders will be provided an opportunity to confirm the contents of the conversation.
- Send a follow-up email thanking the stakeholder for his/her time and **document the key points** of the conversation in the body of the email: topics covered/purpose of the call, major developments, emerging action items. These details are critical for RTD and should allow any person to understand clearly the purpose and result of a meeting conversation. The follow-up email should allow stakeholders to confirm for accuracy.
- Take and share detailed call notes with the Coordination Team via email for additional clarity when needed.
- Copy the Project Coordination Lead when sending the invitation email and the follow-up email; and
- Save the email documentation in a safe place for future reference and inclusion in regular RTD reporting.

6.3 Measuring Success

The Statewide CASE Team will measure success in the following ways:

- The appropriate stakeholders were invited to the stakeholder meeting.
- Key stakeholders attended the meeting.
- Information was presented clearly and concisely.

- Provide stakeholders with multiple opportunities to provide feedback before, during, and after the meeting (e.g., verbal comments, chatting comments, providing input via email or phone conversations with CASE Authors, participation in polls).

7. Statewide Utility Codes & Standards Team's Advocacy Website

7.1 Objectives

The website is an important tool to enable communication with those interested in the code changes. The Statewide CASE Team will post information about upcoming events and code change proposals. The website also provides a means for stakeholders to communicate with the Statewide CASE Team by submitting measure ideas for the current or future cycles as well as general questions or feedback. Below are the goals for operating title24stakeholders.com successfully:

- Provide useful information to target audiences including information about public stakeholder meetings, code change proposals, and the code development process.
- Encourage and maintain audience engagement.
- Design focused engagement efforts informed by website analytics and gaps identified.
- Cross-promote other utility-sponsored websites (i.e., EnergyCodeAce.com and LocalEnergyCodes.com).
- Direct stakeholders to the CEC's website as appropriate.
- Develop and maintain a public record of advocacy activities that will be maintained over time.

7.2 Implementation Strategy

The Coordination Team will maintain the website and populate with content provided by members of the Statewide CASE Team, including CASE Authors.

The website has an associated email address, info@title24stakeholders.com. The Coordination Team monitors this email address and responds to inquiries, including website content update requests, within two business days. Any measure specific emails received in that inbox are forwarded to the applicable CASE Author(s), the appropriate Utility Lead(s), and the appropriate Project Coordination Lead.

7.3 Measuring Success

The Statewide Utility Codes & Standards Team will use title24stakeholders.com metrics to evaluate the success of this PEP throughout the 2025 code cycle. In addition to communicating information from the website, it is also important to communicate outside information (i.e., CEC announcements) to drive people to the website as well.

Integrated analytics will be crucial to easily identify which pieces of the public outreach campaign are successful, although campaign success will not be determined solely through this metric. Metrics that will be collected and monitored on a monthly basis include:

- Documents released for public review on time
- Quantity and quality of feedback (i.e., Does feedback reflect an open accessible process with informed stakeholders?)
- Documents meet quality expectations
- Browsers used to access the website
- Devices used to access the website (i.e., smartphone vs computer)
- Total visitors to the website
- Total new visitors to the website (and when)
- Means of site entry
- Search terms for site entry
- Top page visits
- General geographic location of visitors
- Combined analytics (i.e., Listserv communications that translate into page views, etc.)

Metrics will be cross analyzed to identify stakeholder engagement and website engagement to further evaluate the outreach potential and success of the website. Gaps identified through this cross-analysis will help inform the public outreach campaign efforts.

7.4 Website Accessibility

To ensure a safe, comprehensive, and legible website experience, the stakeholder website will meet Web Content Accessibility Guidelines (WCAG) 2 Web Accessibility Standards. These standards set in place basic legibility criteria, screen-reader compatibility, captioning, color cohesion, proper referencing, among many other baseline practices. By meeting these standards, the Statewide CASE Team can ensure that the website is not a barrier for entry to stakeholders with a stable internet connection. In addition, the website will provide tutorials and informative documentation on how to use/interact with the code cycle for transparency and ease of use.

8. Surveys

8.1 Objectives

The Coordination Team will utilize surveys to gather information on how we can engage stakeholders more effectively during the 2025 code cycle at beginning, the middle and end of the code cycle with the same or similar questions to gauge progress over time. Survey questions will address stakeholder awareness and engagement; barriers to more engagement; solicit general input on engaging with the Codes and Standards (C&S) program; and measure ideas. Stakeholder engagement surveys were implemented in the 2022 code cycle, so 2025 results can also be compared to previous code cycles.

Since the surveys aim to explore issues around engagement and awareness with the C&S program, bias is likely to occur where those who respond are more likely to be interested in and already engaged with the program, with a lower response from those who are less engaged. Providing incentives and other efforts to boost the response rate (such as sending a notification to stakeholders of the survey) will reduce the likely bias and the overall survey results would be more reflective of the target population of stakeholders. Incentives are typically $10 gift cards to Amazon or $10 donations to Habitat for Humanity available to anyone who completes and returns a survey.

The Statewide CASE Team will also deploy surveys to collect targeted information about specific code change proposals.   In the 2025 code cycle, the need for surveys will be identified by CASE Authors assessed on a measure-specific basis. Measure specific surveys are sent to people who either have knowledge of a topic or who might be impacted by the proposed measure.

8.2 Implementation Strategy

The Coordination Team will work with an outside consultant, Utility Leads, and CASE Authors to design and execute surveys. Every effort will be made to coordinate surveys so that each stakeholder does not receive multiple surveys from multiple CASE Authors.

8.3 Measuring Success

The specific metrics for success will be determined through the survey design. For the stakeholder engagement surveys, administering the survey with consistent questions at the beginning, middle and end of the code cycle will illuminate improvements over time.

8.4 Accessibility

To ensure a safe, comprehensive, and legible survey experience, best practices[3] for the distribution and design of the survey will be adopted. This includes the following criteria:

- Text styling and size are subject to WCAC 2 Guidelines
- Media use and styling are subject to WCAC 2 Guidelines
- Question structure will be concise for enhanced comprehension
- Surveys will be available in multiple languages.
- Surveys will be made available in print upon request. The request instructions will be provided with the announcement and distribution of the online survey. Printed surveys may also be requested in multiple languages.
- Printed surveys will follow baseline print accessibility guidelines.

[3] Best practice is to use plain language: https://www.plainlanguage.gov/guidelines/

9. Email Campaign Outreach

9.1 Objectives

The Statewide CASE Team will use email marketing campaigns to communicate targeted messages to stakeholders at specific times throughout the code cycle and to maintain ongoing communication with stakeholders, so they are aware of progress made throughout the code cycle.

Digital engagement through marketing or direct email correspondence will be saved and clearly documented throughout the code cycle.

9.2 Implementation Strategy

9.2.1 Evaluating and Improving Email Campaign Visibility[4]

Techniques to improve success of email campaigns will be employed. The Coordination Team staff will:

1. Work to update and revise the stakeholder list at the beginning and throughout the code cycle, segmenting the lists into universal and topic-specific areas.
2. Run a one-time, soft-bounce campaign with the existing listserv. This will update the contact list to purge email addresses that cannot receive campaign notifications (bounced emails).
3. Build and send 'reactivation email' mini-campaigns. This will help purge email addresses that are able to receive email, but do not actively engage with the email components (i.e., the email goes unopened).
4. Email mini-campaigns to ask recipients to share the email with colleagues.
5. Send emails with subject line that are clear and consistent with the content of the email–no tricks, clickbait, or ambiguity about what the email actually contains.
6. Use email analytic metrics to determine success beyond delivery rate.
7. Optimize for mobile devices.
8. Conduct A/ B tests to assess strategies, evaluate metrics and make adjustments.

[4] Source of action items: Marketo, "The 8 Biggest Mistakes Email Marketers Make & How to Avoid Them"

9.3 Listserv Platform

Constant Contact is used as the listserv/marketing email platform and is managed by the Coordination Team to sign up new stakeholders. The list is opt-in, and we invite people to add themselves but we can directly add people as requested.

9.4 Measuring Success

Throughout the 2025 code cycle, the Coordination Team will measure analytics of campaign emails, consisting of the following metrics.

- Number of opens
- Click-through rate
- Unsubscribe rate
- Opens by device and location
- Spam score

This will allow data to be collected pertaining to how many emails reach a user's inbox, as opposed to their spam folder, to get a clearer picture of actual outreach achieved.

10. Social Media

10.1 Social Media Background & Objectives

Combining face-to-face outreach with digital efforts can potentially shift minimally contacted or not-yet contacted groups into engaged participants who provide feedback during the Title 24 code cycle, in particular environmental and social justice advocacy groups. Social media channels facilitate engagement in real-time and provide an easy way for stakeholders to quickly obtain and share key information.

10.2 Measuring Success

Metrics allow us to quantify the success of this plan. Tracking and measuring the number of individuals who read, click, and otherwise engage with Title 24 content, enables measurement of the breadth and depth of the impact of our digital strategy:

- Impressions garnered on social media over time, recorded monthly
- Followers and interactions on Twitter during milestones and code review announcements
- Content engagement by key influencers in our topic area
- Link clicks
- Likes
- Comments
- Saves (if measurable)
- Shares
- Number of retweets on Twitter
- Sharing and tagging another use
- Geographic engagement