

# LOW INCOME OVERSIGHT BOARD

Community-Based & Non-Profit Organization Engagement

Project Team Analysis & Recommendations

September 20, 2018

## ASSIGNMENT RECAP



**Low Income Oversight Board (LIOB) Goal:** Strengthen relationships and increase active participation from community-based and non-profit organizations that complement the LIOB's mission, vision and guiding principles.



**CBO Engagement Project Team** was created to conduct a situational analysis, survey LIOB members and targeted organizations, and make recommendations to the LIOB for implementation.

# ORGANIZATION DISTINCTION

Non-Profit Organization / 501(c)(3)	A corporation or association that conducts business for the benefits of the general public without shareholders and without a profit motive. Also known for their 'public charities' and 'public benefits'.
Community Based Organization	Public or private nonprofit groups that work at a local level to improve life for residents. Focus is to address issues of inequality, inequity, and societal disadvantages within a community (geographic and/or demographic terms).
501(c) Designation	IRS tax exempt designation. There are 29 types of organizations that are tax-exempt under IRS Section 501(c), including public and private foundations, chambers of commerce and other business leagues, and state-chartered credit unions.

# ACTIVITY DISTINCTION

## ***Promotion***



Communication used to inform or persuade target audiences of the relative merits of a product, service, brand or issue. The aim of promotion is to increase awareness, create interest and drive participation.



## ***Engagement***

Process by which an organization involves people who may be affected by the decisions it makes or can influence the implementation of its decisions.

# SITUATIONAL ANALYSIS



## Target Audience Reach

- Service list & LIOB website are primary methods of communication
- Approximately 16 out of 165 identified as members of target organizations



## Meeting Format & Design

- Locations determined by LIOB up to 1 year in advance – rotates by region
- Agenda developed by LIOB members
- Agenda published a minimum of 10 days before meeting
- Quarterly meetings with 15 minutes designated for public comment

# LIOB MEMBER INTERVIEWS



## Overview of Methodology

## Findings

- Increased attendance would be nice, but engagement is more important than a full room



- Target organizations can give firsthand information about their community
- Hungry for participation & meaningful dialogue with target organizations that align with LIOB scope and relevant regulatory topics



- Very open to changing the meeting format to encourage more dialogue and higher level of engagement

# LIOB MEMBER INTERVIEWS



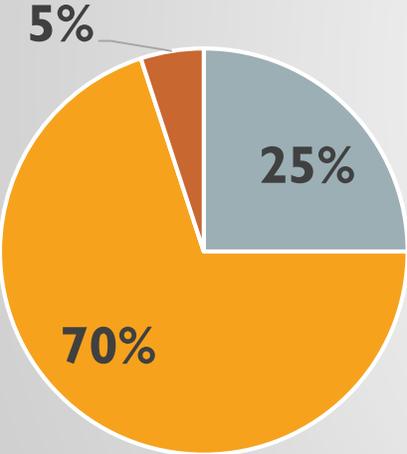
## Success Looks Like

- Increased participation & engagement from target organizations
- Hearing directly from target organizations at meetings through substantive presentations with dedicated time on agenda
- Dialogue leads to impactful change – builds on best practices, leverage resources, etc
- Actions taken by LIOB, CPUC and IOUs to have meaningful impact to address topics brought by target organizations
- LIOB embraces, prioritizes and owns this effort, using discussion items on the agenda as strategic thinking sessions



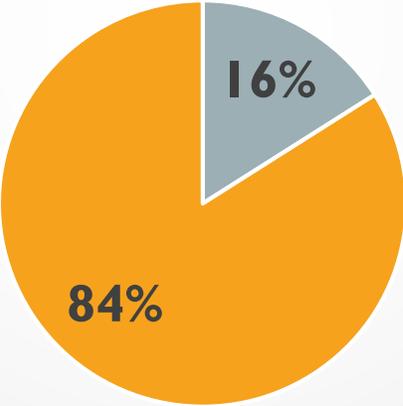
# TARGET ORGANIZATION SURVEYS

Are you Familiar with LIOB?



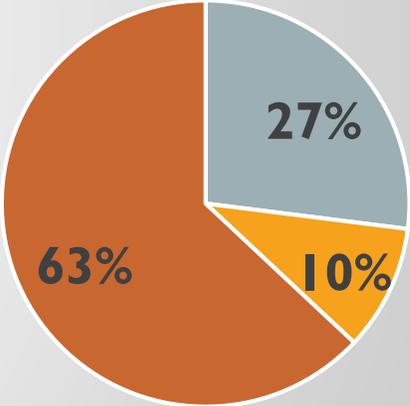
yes no unsure

Have you Participated in an LIOB Meeting?



yes no

Would You Attend Again?



yes no maybe

# TARGET ORGANIZATIONS SURVEYS

“I was invited”

“I wanted to meet  
the Board”

“I can’t remember”

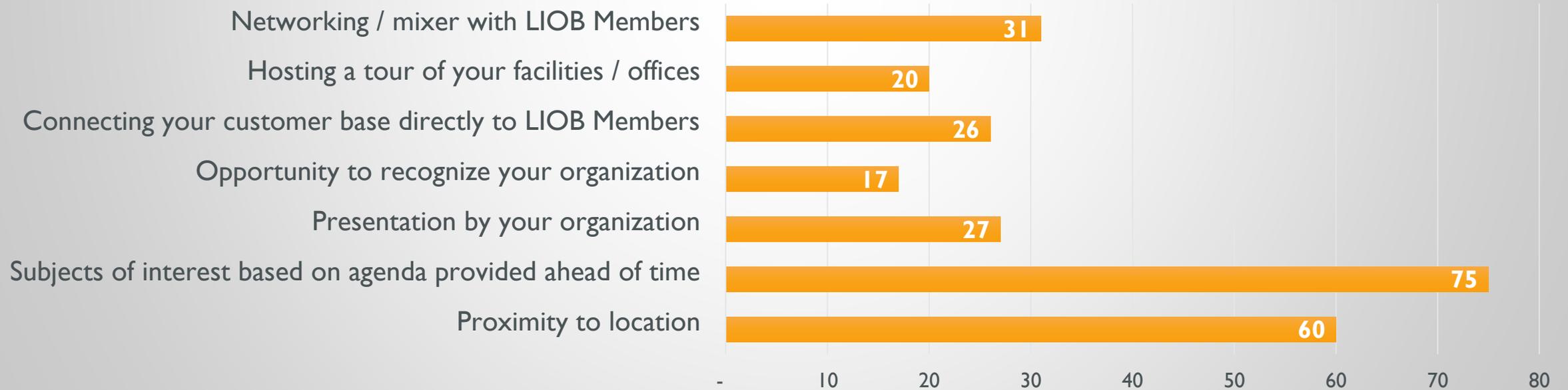
## Why Did You Attend?

“I gave a  
presentation”

“It’s easier to hear”

# TARGET ORGANIZATION SURVEYS

What Would Encourage You to Attend? (85 responses to this question)



# TARGET ORGANIZATION SURVEYS

What Topics Would You Want to Hear About at LIOB?



- Solutions based on collaboration, partnering, leveraging resources to provide better service, outreach, etc.



- More accessible and digestible regulatory updates and information and a better understanding of LIOB scope & priorities

- Ways to protect and service their client base through advocacy on topics like affordability, protection from scams



- \*More information on Customer Assistance programs in addition to broader info on energy efficiency and renewables

# TARGET ORGANIZATION SURVEYS

## What Are the Biggest Obstacles to Participation?



- Relevance
- Awareness
- Location



## How Much Time Is Needed to Attend/Present?

- Ranged from 2 weeks to 2 months
- Most common answer was 1 month

**LOW INCOME OVERSIGHT BOARD  
ENGAGEMENT  
RECOMMENDATIONS**

# TWO PRONGED APPROACH

## ***Promotion***



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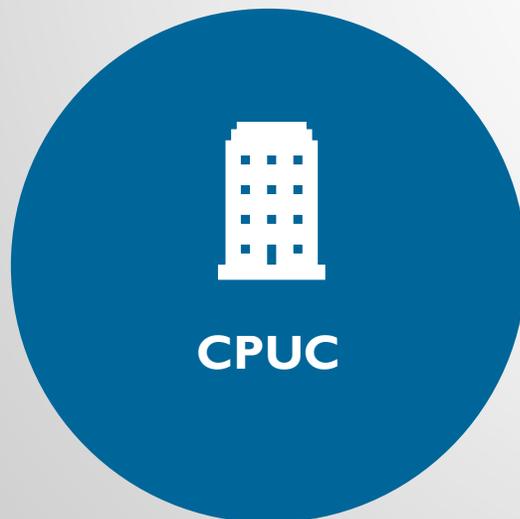
## ***Engagement***

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# TWO PRONGED APPROACH

## ***Promote LIOB & Leverage Existing Connections***

- Increase awareness, create interest, and drive participation
- Recommend partner organizations to LIOB based on topic, area of interest, etc.



# TWO PRONGED APPROACH

## *Engage with Target Organizations*

- Invest in building meaningful connections with target organizations who can educate, inform and create positive impact on LIOB focus areas



## RECOMMENDATIONS - LOGISTICS & COMMUNICATIONS



Distribute/post agenda 1 month in advance



Add discussion items on agenda in addition to public comment



Educate and set expectations regarding the LIOB's Mission, Vision and Scope

Leverage likeminded organizations to spread the word - CPUC Outreach, Utilities, CSD, CEC, TURN, etc



## RECOMMENDATIONS - LOGISTICS & COMMUNICATIONS



Create Constant Contact to build list of target organizations on LIOB website

Use Constant Contact list to send meeting information, reminders & requests for input



Solicit input for next quarter meeting topics and discussion items two weeks prior to LIOB meetings

Add standing agenda item at each LIOB meeting to discuss input and determine agenda items for next meeting. Discuss suggested speakers, etc.



Encourage participation with target organizations that can directly contribute to the meeting agenda



# RECOMMENDATIONS – ENGAGEMENT



Educate and set expectations regarding the LIOB's Mission, Vision and Scope

Organize meetings to support targeted organization engagement



Dedicate time at each meeting to discuss target organization input, solicit feedback during the meeting and ask for recommendations for future meeting topics/agenda items



# RECOMMENDATIONS – ENGAGEMENT

## Drive Engagement



- Build relationships with targeted organizations
- Provide clear expectations on their role in meeting
- Follow up to evaluate impact
- Communicate results



# RECOMMENDATIONS – LIOB TOOLKIT



## Develop Customizable Templates

- Introduction to the LIOB & meeting invitation
- Request for meeting topic suggestions
- Request for meeting feedback
- Invitation to target organization to participate in a presentation/discussion item
- Thank you and follow up to target organizations who played a role in meeting

# Q&A AND DISCUSSION



Feedback



Next Steps for LIOB to Operationalize

THANK YOU FROM THE PROJECT TEAM!



Utilities

**Naila Ahmed, Pacific Gas & Electric**

**Daisie Cristobal Sanchez, SoCalGas**

**Louis Lopez, Southern California Edison**

**Brandi Turner, San Diego Gas & Electric**



CPUC

**Zaida Amaya**

**Rian Troth**