

RCPWG

Monterey Bay Area
Regional Climate Project Working Group



Recommendations for Advancing Equitable RCPWG Decision-making for Climate Investments



May 2024

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Summary

The Monterey Bay Area Regional Climate Project Working Group (RCPWG) was a concept that emerged from the ground up in 2021 and 2022 in response to the need to coordinate on historic funding opportunities for work on climate change that could be regionally impactful. The RCPWG first focused on establishing interim governance quickly and adopted an interim charter in February 2023 (see appendix) to allow the group to quickly begin pursuing significant funding for the region. Following adoption of the charter, RCPWG members elected a Chair and Vice-Chair as the leadership team. With funding from the Urban Sustainability Directors Network (USDN), RCPWG members are engaging environmental justice (EJ) groups and community-based organizations (CBO) to help define their roles and relationships with respect to the RCPWG's project development and decision-making processes.

This document is a summary of the leading best practices identified by RCPWG members and advisors, elected officials, and CBOs and EJ groups developed during a series of workshops. The recommended practices are focused on RCPWG operations and decision-making, and recommendations for equity engagement design during grant proposal process and post-awarded grants.

Project Overview

RCPWG membership is currently composed of staff from Monterey, Santa Cruz and San Benito Counties, and the Cities of Santa Cruz and Watsonville, as well as the advisors Ecology Action and the Association of Monterey Bay Area Governments (AMBAG). The RCPWG aims to expand membership in 2024 to include staff from more jurisdictions in the Monterey Bay Area, as well as environmental justice (EJ) groups and community-based organizations (CBOs).

Though CBOs and EJ groups were involved in the formation stages of the RCPWG, they were not originally included in the charter. The startup pace of the RCPWG precluded fully building out governance and the RCPWG wanted to be intentional about building equity across workstreams. Through the financial support of the Urban Sustainability Directors Network (USDN), RCPWG members are now engaging CBOs and EJ groups, including members of the Monterey Bay Area Climate Justice Collaborative (MBCJC), to help define their roles and relationships with respect to the RCPWG's project development and decision-making processes. By adhering to a bottom-up approach in defining these roles, the RCPWG will develop more inclusive and competitive grant proposals, which in turn leads to more resources for equitable climate work in the region.

The RCPWG held three workshops between February and May 2024 with members of the MBCJC and other community-based organizations, elected officials, and city/county staff. During the workshops, participants brainstormed successes and challenges in other collaboratives and working groups for which they have participated. This document summarizes the key themes and specific recommendations identified through the workshops around equitable engagement and decision-making.

Through the feedback from the three workshops, the RCPWG prepared guidance around equitable engagement and decision-making. The intended outcomes of this project, through these three workshops, were to:

1. secure commitments for ongoing funding of the RCPWG's work, including compensation for EJ group participation,
2. continue to build trust and relationships with EJ groups, and
3. cultivate elected and executive champions.

These three outcomes of the workshops and meetings with the Boards of Supervisors and City Councils will enable the RCPWG's ability to compete and secure funding to more effectively and equitably implement climate projects. The outputs of this project are focused on the operation and implementation efforts of the RCPWG as a group. However, individual jurisdictions may look to adopt similar practices for their own climate response based on the recommendations of this project.

Recommendations for Embedding CBOs into the Operations and Decision-making Processes of RCPWG

This document is intended to capture practices and policies for the RCPWG to consider adopting to enable CBO participation in the discussions that are focused on identifying and securing equitable climate funding to implement climate action and adaptation plans in the Monterey Bay Area region. These recommended practices are based on the input shared by CBOs and EJ groups during the workshops.

Recommendations are focused on the following:

1. **Operations of the RCPWG:** This includes recommendations related to RCPWG , activities, convenings, and decision-making.
2. **Decision-making structure of the RCPWG:** This includes recommendations related to embedding CBOs into the decision-making governance structure.

3. **Recommendations for equity engagement post-awarded grants:** This includes recommendations for equity engagement as part of the implementation of funded grant activities.

While one major output of the limited three month USDN grant timeline is to share outcomes of the project with the five jurisdictional elected bodies, the recommendations only pertain to the RCPWG decision-making practices, and not to individual city or county practices.

Recommendations for RCPWG Operations

The recommendations for RCPWG operations can be grouped into three key thematic areas:

1. Continue to strengthen relationships and partner with CBOs;
2. Foster Accessible and Inclusive Communications; and
3. Support Accessible and Inclusive Meetings

Continue to Strengthen Relationships and Partner with CBOs

In the RCPWG, it is important to enable conditions for CBOs and EJ groups to be active collaborators. This involves enlisting them as trusted voices representing community needs and compensating them for their time and local expertise. CBOs and public agency/local jurisdiction staff should collaboratively develop a co-designed approach to outreach and community engagement. Having CBOs involved in co-designing community engagement strategies encourages relational-centered and bottom-up approaches that are more likely to result in initiatives and programs that are responsive to the unique needs and priorities of each community.

Below are specific recommended actions/action items CBOs from workshop participants for the RCWPG to consider adopting, related to RCPWG operations:

1. **Encourage participation from a diversity participation:** Workshop participants encouraged a diverse range of voices to inform RCPWG discussions so organizations representing diverse community groups see themselves represented.
 - o Workshop participants identified the following community types: youth voices and students, the science community, women, indigenous communities, LGBTQ+, people with disabilities, ethnic and racial minorities, faith-based minorities, immigrant populations, low-income or economically disadvantaged communities, rural communities, non-native English speakers, and older adults.

2. Compensate CBOs and participating individuals from community groups:

Enable participation of CBOs and community members by compensating them for their time with stipends and/or food.

- Participants identified compensation seen as a form of recognition for expertise, promoting equity, and encouraging involvement.
- Suggestions for future meetings include further exploring factors behind low uptake, and offering opt-in/opt-out options.
- Participants also suggested that RCPWG may want to consider using a sliding scale approach. Compensation for participating in a 90-minute meeting can vary for participants based on cost of living, levels of expertise required, and resources available (for example, if a participant is already being compensated through their organization or agency, they may not require an additional stipend).
- The suggested compensation amounts ranged from \$75 to \$200 per participant, with the most common recommendation being \$100 for a 90 minute meeting.
- When determining the compensation amount, participants noted that the RCPWG should also consider the additional time requested to be spent on pre-meeting and follow-up assignments. This may warrant stipends rather than hourly rates to account for the preparation and post-meeting activities (e.g., reviewing materials).

3. Partner with CBOs to implement RCPWG activities. CBO participants have indicated their interest primarily in working with RCPWG members in the following RCPWG activities:

- Participate in RCPWG calls to advise on RCPWG grant strategy (what grants to pursue).
- Co-develop SOW and/or roles of CBOs in grant applications.
- Partner to be community outreach liaisons by supporting RCPWG members as equity and outreach consultants as part of planning efforts, and conduct outreach, disseminate information, and advise on, or refine, messaging of communications. See recommendations on post award activities.

Foster Accessible and Inclusive Communications

Effective communication strategies help to facilitate understanding, collaboration, and engagement among stakeholders, fostering a culture of transparency and trust. Clear messaging is critical for ensuring information is conveyed accurately and comprehensively, enabling informed decision-making and meaningful participation from all stakeholders involved. These practices aim to enhance community engagement and ensure that the initiatives are accessible and understandable to all.

Below are concrete recommendations from invited participants on practices and policies for the RCWPG to consider adopting, related to RCPWG operations.

1. **Establish shared community agreements:** Review shared community agreements at the start of each convening and allow space to adjust.
 - Participants developed community agreements through this process. See Appendix for the community agreements established during the workshops.
 - One example of a community agreement added by participants is to **avoid using highly technical language or jargon**. This means providing clear, non-technical communication in presentations and meeting materials to ensure everyone understands. Participants also recommended avoiding using acronyms.
2. **Recognize different cultural work ethics:** Avoid imposing a specific cultural work ethic that over-prioritizes efficiency and productivity, acknowledging that grassroots solutions require thoughtful deliberation and investment in relationship building, which requires time that does not always conform to grant deadlines.
3. **Offer different modes for feedback:** Different modes of feedback can encourage participation from a wider range of participants. These include verbal approaches such as open sharing and raised hands, as well as nonverbal options like Jamboard, polling, and email.
 - Participants emphasized the importance of providing multiple opportunities for feedback, such as initial and final reads, and others highlighted the efficiency of polling for quick consensus that also maintains anonymity.

Support Accessible and Inclusive Meetings

The consideration of leading practices for inclusive participation for meetings can promote diversity of perspectives, create a welcoming atmosphere, and ensure equitable opportunities for meaningful engagement, ultimately enriching the outcomes and effectiveness of the meeting. Additionally, it is important for meeting organizers to thoughtfully structure meetings to maximize participants' time and contributions. For example, optimizing meeting logistics can streamline processes, minimize disruptions, and enhance overall engagement.

The following recommendations highlight various leading practices for conducting inclusive, collaborative, and effective meetings. These are recommendations from invited participants for the RCPWG to consider adopting.

Meeting structure

- 1. Concise and focused meetings:** Keep meetings concise and focused to respect participants' time.
 - Workshop participants indicated a preference for concise and focused meetings lasting between 60 to 90 minutes, while ensuring sufficient time for participant feedback and discussion. The duration may vary based on factors such as the frequency of meetings and the importance of the topics being discussed; however, the goal is to strike a balance between efficiency and adequate time for reflection and discussion.
- 2. Include relevant breaks:** Incorporate breaks into longer meetings to accommodate the needs of participants and to maintain engagement.
 - Participants suggested that breaks should typically be in meetings lasting between 90 minutes and 2 hours, or longer, with some advocating for breaks at the halfway point for meetings exceeding an hour in duration. Factors such as whether the meeting is conducted in person or virtually may influence the decision to include breaks.
- 3. Facilitate breakout sessions:** Especially for longer meetings, participants recommended including more breakout sessions for deeper discussions and engagement in smaller groups.
 - Participants discussed the value in having CBOs meet separately in a breakout session before reporting back to the broader RCPWG. This approach can be conducive to more focused engagement and learning across county lines for CBOs involved in climate initiatives. Participants also emphasized the importance of ensuring clarity regarding the purpose and the boundaries of influence participants have in meetings.

Meeting logistics

- 4. Distribute meeting materials ahead of time:** If possible, provide materials to participants to have sufficient time to review in advance of the meetings. With regards to lead time for receiving materials, workshop participants identified the following guidance.
 - Provide 1-2 weeks of time to review materials, depending on the length of review time required, and the complexity of materials (for example, a grant proposal may require more review than a summary report). Shorter documents (5 pages or less) may require at least one week of review; longer documents will require more review time.
 - Reminders, especially the day before, are helpful for preparation.
 - Participants may wish to coordinate with their team members or board members for feedback, which may require more review time.
- 5. Accommodate schedules:** Identify the best day and time that is appropriate

for all participants. For future scheduling, workshop participants were asked to provide insight on their availability.

- If possible, future RCPWG meetings will be scheduled to avoid scheduling conflicts with existing board meetings, department meetings, and other regular events within participant organizations.
 - Participants also recommended using web-based scheduling tools, such as Doodle polls or When2Meet.

6. Use engaging tools in presentations: Utilize engaging and interactive tools, such as Mentimeter and Jamboard, to make presentations more engaging and personal.

Inclusive participation

- 7. Conduct accessibility checks:** At the start of each meeting, conduct an accessibility check to identify and address potential barriers to successful participation.
- 8. Encourage participants to share pronouns:** This creates a more comfortable and safe space for all participants to share their preferred pronouns.
- 9. Relational-centered co-design process:** Emphasize a co-design process that values relationships and collaboration, and fosters open discussion.
- 10. Regularly conduct feedback:** Regularly solicit feedback to identify and address barriers to participation.
- 11. Conduct pre-grant outreach and education:** Conduct ongoing outreach, educational sessions, sharing, experiential learning sessions, and planning sessions before grants are announced.

Farallon Strategies' Additional Recommendations

As the consultant team facilitating this process on behalf of the RCPWG, Farallon Strategies has identified additional recommendations based on the team's experience integrating CBOs into collaborative governance decision-making processes.

These considerations are for the RCPWG to consider for RCPWG operations, in addition to the recommendations above.

- Clearly **articulate how input from CBOs will be used**, and the extent of their role in decision-making, at every step in the process.
- On at least an annual basis through discussion, **collect feedback and monitor progress** on how well recommendations are being implemented.
- Identify or create opportunities for **local government staff to learn about CBO initiatives/priorities**.

- **Support capacity building of CBOs** by connecting them to resources and technical assistance to grow/enhance their ability to deliver programming, and participate in advisory capacity for initiatives, like the RCPWG.

Recommendations for Equity Engagement Design During Grant Proposal Process and Post-awarded Grants

Several of the practices and policies recommended by workshop participants to implement (or avoid) pertain to the development of the grant opportunities, or to the implementation of the funded grant activities. These practices and policies apply more to broader community and public engagement and outreach as part of the implementation of RCPWG, and other affiliated grant funding. These include leading practices for co-developing and implementing climate response strategies in the Monterey Bay Area Region. It is important to capture these suggestions from workshop participants to consider for the administration of grants in their communities.

- In support of public engagement initiatives related to grants once secured, CBOs can:
 - Facilitate and/or provide space for workshops/town halls for community members;
 - Address language and cultural barriers in communications to community members;
 - Structure conversations and solicit feedback from their own organizations and community members;
 - Build relationships and capacity within the community; and
 - Facilitate fun and cultural activities.
- On a grant by grant basis, ensure that implementation procurement protocols for each specific grant do not preclude participation in scoping the proposal. If a grant does preclude participation, organizations may be asked to recuse themselves from the scoping process.
- Produce documents that meet state accessibility requirements (e.g., for braille readers, etc.).
- For in-person meetings, provide childcare for parents or guardians to enable participation for those who need it.
- Facilitate listening sessions and sharing circles to make sure everyone has the opportunity to speak and give input, and allow for co-creation time.
- Emphasize co-design process for climate strategies / measures.
- Pair climate solutions with the most needed community resources, i.e. affordable housing.
- Lift marginalized voices, including women, by putting them first on the agenda and providing eliciting prompts.

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- Offer translation services to reduce language barriers and encourage participation from diverse linguistic backgrounds (e.g., English, Spanish, and Indigenous languages, etc.).
- Reduce language barriers by providing literacy-reviewed material for community members.
- Distribute materials in various formats for communication (e.g., send more than mailers).
- Avoid meetings during working hours.
- Meet people where they are for community and in-person events: Make information accessible to the public by canvassing or going out to meet the public in community locations, such as farmers markets and parks. Work with CBOs to identify events and locations that draw crowds to set up tabling materials for in-person events.
- Continue projects even when grant funding ends.
- Provide technical assistance pre- and post- presentations or concepts where technical elements are included. Identify focus areas for feedback in areas that residents/CBOs can respond.
- Adopt a bottom-up approach to needs assessments, involving all stakeholders in the planning process when grants are identified.
- For engagement specified in grant programs, RCPWG members can invest in their relationships with CBO partners and community members by hosting in-person meetings when possible, or attending CBO meetings/events.

Appendix

Appendix A: RCPWG Acronyms

- CAP: Climate Action Plan
- CBO: Community-Based Organization
- CERF: Community Economic Resilience Fund
- CJC: Climate Justice Collaborative
- EJ: Environmental Justice
- MBACJC: Monterey Bay Area Climate Justice Collaborative
- RCPWG: Monterey Bay Area Regional Climate Project Working Group
- RFP: Request for Proposal
- TCC: Transformative Climate Communities
- USDN: Urban Sustainability Directors Network

Appendix B: RCPWG Interim Charter

The interim RCPWG charter was developed through discussions with the Monterey Bay Area Regional Climate Project Working Group (RCPWG) in 2023.

The Challenge and Opportunity

Climate change is a priority issue for organizations across the Monterey Bay Area Region. A focused and organized approach to accessing historic State and federal funding and resources is required to bring the region together to collectively achieve equitable and resilient outcomes. Access to large scale transformative grant opportunities has the potential to accelerate implementation of climate change mitigation and adaptation projects and programs across the three-county region. The Monterey Bay Area Regional Climate Project Working Group (RCPWG) was formed to regionally work together to access more funding to address climate change.

RCPWG Mission

The mission of the Regional Climate Project Working Group (RCPWG) is to collaborate among groups and organizations in the Monterey Bay Area region, including Santa Cruz, San Benito, and Monterey Counties, to develop, prioritize, secure funding for, and effectively and equitably advocate for and implement regionally beneficial climate mitigation and adaptation projects and programs.

Membership

RCPWG membership are dues-paying city/county governments. Regional agencies, nonprofit 501(c)3 organizations, or tribal organizations/ governments members may serve as advisors and attend RCPWG meetings upon consent of the RCPWG.

RCPWG members make decisions with respect to what grants the RCPWG pursues, appropriate advisors, subcommittee formation, as well as decisions related to the future membership/leadership of the RCPWG as it evolves.

The RCPWG may decide to change the composition of the RCPWG to a different structure or to add representation from other organization types once established.

Leadership

The RCPWG is led by a Chair and Vice Chair. The term of the Chair and Vice Chair will be one year. Until officer elections took place, the RCPWG Managing Consultant (Farallon Strategies) led the scheduling of meetings, will set agendas, and facilitate RCPWG meetings. The scheduling of meetings, agenda development, and facilitation of RCPWG meetings are closely coordinated between Farallon Strategies and the Chair and Vice-Chair. The Chair and Vice Chair approve work plans and invoices for the consultants, are the final decision maker on any agendas, and have the signatory authority on behalf of the RCPWG.

Decision-Making

The RCPWG will make decisions with respect to what grants the RCPWG pursues, subcommittee formation, as well as the future membership, leadership, and dues structure of the RCPWG as it evolves. Decisions will be made by consent, meaning the absence of objections, which supports accelerated decision-making.

Dues and Stipends

The RCPWG provides members with access to an established network of regional partners, grant identification and writing assistance, and grant dollars awarded for each grant secured. Each RCPWG member pays dues to be able to participate in voting. Dues will be periodically updated and maintained in an online location and format where all members will have access to the document. The Community Foundation for Santa Cruz County (CFSCC) is the fiscal sponsor for RCPWG.

Sub-Committees

Sub-committees of the RCPWG will be established to support the mission of the RCPWG with respect to specific focus areas (e.g. building electrification, transportation, etc.). Sub-committees will have the primary focus of identifying, developing, and if awarded, implementing grants. Each subcommittee must have a

minimum of three participating RCPWG members, and one member who is willing to serve as a working group liaison.

The Sub-committee Liaison is responsible for creating agendas, facilitating sub-committee meetings, advancing the subcommittee toward its agreed upon purpose, reporting back to the RCPWG (verbally or in writing) on the progress and decisions of the subcommittee. The RCPWG has the ability to initiate or sunset a sub-committee through standard voting procedures.

Meetings

Members of the RCPWG are expected to attend and participate in regular RCPWG meetings. The RCPWG meet virtually every six weeks for up to two hours.

Sub-committee meeting frequency will be determined by Sub-committee Liaisons based on input from subcommittee members. Meetings will be run using a consent model with quorum being 3/5ths of members being present.

Appendix C: RCPWG Activities

Members of the RCPWG benefit from learning about grant opportunities, jointly developing competitive grant proposals, and accessing an established network of partners that can lead the development of grants and implementation of projects that address climate change in the region.

The RCPWG Strategy Team meetings are conducted to discuss RCPWG administration and upcoming grant opportunities. Additionally, RCPWG leadership (currently a Chair and Vice-Chair) meet with the Consulting Team, as needed, to discuss consultant contract obligations, plan for upcoming meetings, and the status of securing new and existing grant opportunities.

The primary activities of RCPWG members include:

- Share knowledge of grant opportunities and project updates across jurisdictions,
- Design roles in grant proposals,
- Scope projects for grant proposals,
- Participate in grant funded roles and projects,
- Evaluate grant proposal preparation and project execution process,
- Attend one call every six weeks, or as-needed, to discuss RCPWG operations and grant opportunities,
- Hire and manage consultants,
- Collectively decide which grants to pursue and how to pursue them, and

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- Support ongoing discussions of governance for RCPWG and equity considerations.

As described in the charter, the RCPWG members use consent-based decision making with respect to:

- What grants the RCPWG pursues,
- Which advisors to invite to participate in discussions (including regional agencies, nonprofit 501(c)3 organizations, or tribal organizations/governments),
- Subcommittee formation,
- Membership and Leadership, and
- Dues structure.

Appendix D: Workshop Materials

Workshop Participants

Invited Participants	Organization	Workshop #1	Workshop #2	Workshop #3
Tatiana Brennan	Santa Cruz County	X	X	X
Elissa Benson	Santa Cruz County			
Dave Reid	Santa Cruz County			
David Carlson	County of Santa Cruz	X	X	X
Sierra Ryan	County of Santa Cruz	X	X	
Justin Cummings	Board of Supervisors Chair (Santa Cruz County)	X	X	
Cora Panturad	Monterey County	X	X	X
Supervisor Luis Alejo	Monterey County	X		X
Javier Gomez	Policy Analyst for Supervisor Luis Alejo (Monterey County)	X		
Courtney Lindberg	City of Watsonville	X	X	
Jackie McCloud	City of Watsonville	X	X	X
Tiffany Wise-West	City of Santa Cruz	X	X	X
Mayor Fred Keeley	Mayor of Santa Cruz			
Member Martine Watkins	City of Santa Cruz	X		
Celina Stotler	San Benito County	X		X
Arielle Godspeed	San Benito County	X	X	X

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Invited Participants	Organization	Workshop #1	Workshop #2	Workshop #3
Steve Loupe	San Benito County		X	
Abraham Prado	San Benito County			
Supervisor Kollin Kosmicki	San Benito County	X	X	
Observers				
Donovan Arteaga	City of Salinas	X	X	X
Erika Senyk	City of Capitola	X	X	X
Carmen Gil	City of Gonzales			
Jessica Olmedo-Albor	City of Gonzales	X	X	
Amaury Berteaud	AMBAG, RCPWG Advisory Member	X	X	X
Kirsten Liske	Ecology Action, Grant administrator and RCPWG Advisory Member	X	X	X
Community-Based Organizations				
Eloy Ortiz	Regeneración	X	X	X
Maria Elena Manzo	Mujeres en Acción	X	X	X
Leslie Austin	Let's Green CA / Romero Institute	X	X	X
Elaine Johnson	NAACP Santa Cruz Chapter (and Dir, Housing Matters)	X	X	X
Rene Casas	Youth for All	X	X	X
Alex Lopez	Center for Community Advocacy	X	X	
Tyler Scheid	Black Leaders and Allies Collaborative	X	X	X
Karina Moreno	MILPA	X	X	
Maria Cadenas	Ventures	X	X	X
Brando Sencion	Ventures	X	X	
Agustin Angel	Leaders4EARTH			X

Workshop 1

The practices below are transcribed from the Jamboards used in Workshop 1. To help the RCPWG members prioritize near term adoption of practices for equitable CBO engagement in the RCPWG, workshop participants added a “+1” to practices they wanted to emphasize. The number of +1s that people added are denoted in parenthesis next to the best practice or policy.

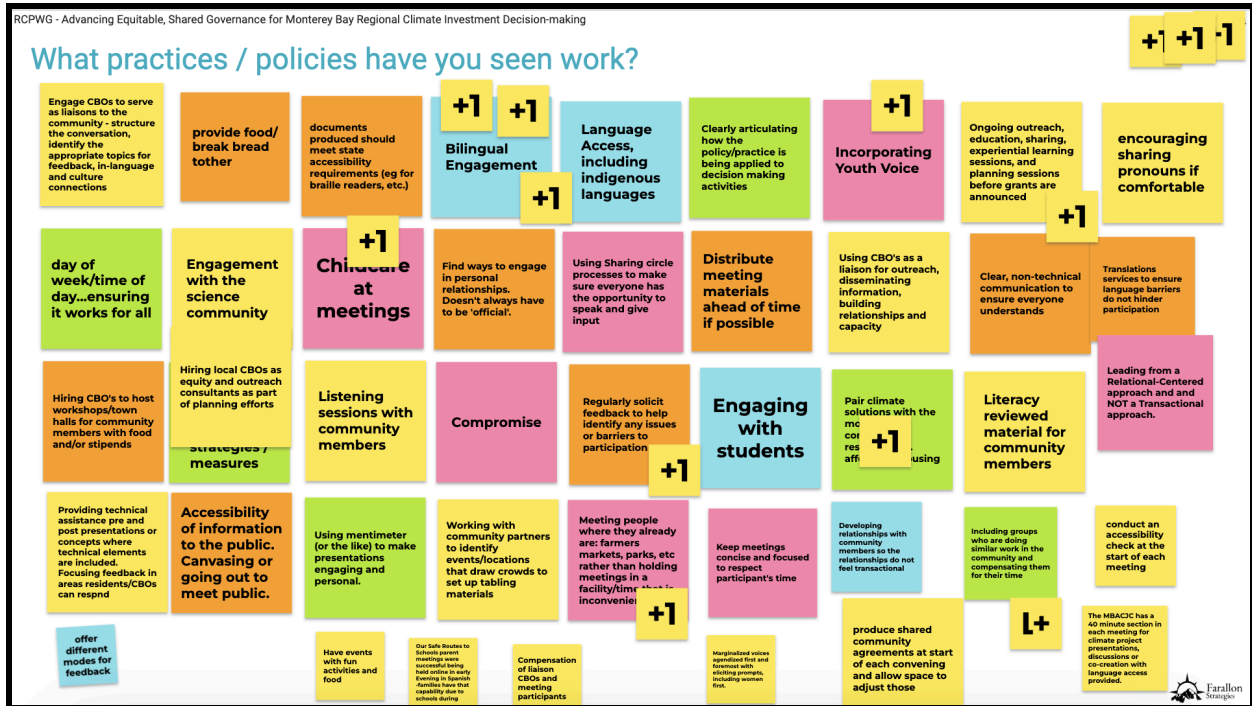
What practices and policies have you seen worked?

- Bilingual Engagement (+3)
- Childcare at meetings (+1)
- Incorporating youth voice (+1)
- Ongoing research, education, sharing, experiential learning sessions, and planning sessions before grants are administered (+1)
- Regularly solicit feedback to help identify any issues or barriers to participation (+1)
- Pair climate solutions with the most needed community resources, i.e. affordable housing (+1)
- Including groups who are doing similar work in the community and compensating them for their time (+1)
- Meeting people where they already are: farmers markets, parks, etc rather than holding meetings in a facility/time that is inconvenient (+1)
- Engage CBOs to serve as liaisons to the community - structure the conversation, identify the appropriate topics for feedback, in-language and culture connections
- provide food/ break bread together
- documents produced should meet state accessibility requirements (eg for braille readers, etc.)
- Language Access, including indigenous languages
- Clearly articulating how the policy/practice is being applied to decision-making activities
- encouraging sharing pronouns if comfortable
- day of week/time of day...ensuring it works for all
- Engagement with the science community
- Hiring local CBOs as equity and outreach consultants as part of planning efforts
- Find ways to engage in personal relationships. Doesn't always have to be 'official'.
- Using Sharing circle processes to make sure everyone has the opportunity to speak and give input
- Distribute meeting materials ahead of time if possible
- Using CBO's as a liaison for outreach, disseminating information, building relationships and capacity
- Clear, non-technical communication to ensure everyone understands
- Translations services to ensure language barriers do not hinder participation
- Leading from a Relational-Centered approach and NOT a Transactional approach.
- Hiring CBO's to host workshops/town halls for community members with food and/or stipends

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- Emphasize Co-design process for climate strategies / measures
- Listening sessions with community members
- Compromise
- Engaging with students
- Literacy reviewed material for community members
- Providing technical assistance pre and post presentations or concepts where technical elements are included. Focusing feedback in areas residents/CBOs can respond
- Accessibility of information to the public. Canvassing or going out to meet the public.
- Using mentimeter (or the like) to make presentations engaging and personal.
- Working with community partners to identify events/locations that draw crowds to set up tabling materials
- Keep meetings concise and focused to respect participant's time
- Developing relationships with community members so the relationships do not feel transactional
- Including groups who are doing similar work in the community and compensating them for their time
- conduct an accessibility check at the start of each meeting
- offer different modes for feedback
- Have events with fun activities and food
- Our Safe Routes to Schools parent meetings were successful being held online in early Evening in Spanish -families have that capability due to schools during
- Compensation of liaison CBOs and meeting participants
- Marginalized voices agendized first and foremost with eliciting prompts, including women first.
- produce shared community agreements at start of each convening and allow space to adjust those
- The MBACJC has a 40 minute section in each meeting for climate project presentations, discussions or co-creation with language access provided.



What practices and policies should we avoid? Please include suggestions for improvement.

- English only presentations. Highly technical presentations (+1)
- Deciding for the community on what they need (+1)
- Presentations that emphasize education and listening only (+1)
- Don't start this work and then drop it if grant funding ends (+1)
- Postcard mailers as the only form of communication
- overly complicated policies and long processes that make it feel hard to take action
- Hosting meetings from 8-5. Consider after hour meetings so community members can attend.
- Assuming that the link between climate change or mitigation strategies/benefits are apparent to all stakeholders
- Avoid imposing a specific cultural work ethic (hard to do when you have a timeline)
- Avoid meetings during working hours
- Limiting community feedback to a specific scope (transportation electrification) when they may want to share about broader priority concerns,
- Avoid ignoring local potential (nurture local partnerships and address challenges that hinder their development)
- Avoid overly technical language and jargon

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RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making February 15, 2024

What practices / policies should we avoid? Please include suggestion for improvement.

English only presentations. Highly technical presentations +1	Postcard mailers as the only form of communication	evening/weekend meetings without childcare +1	overly complicated policies and long processes that make it feel hard to take action	Hosting meetings from 9-5. Consider after hour meetings so community members can attend.	Assuming that the link between climate change or mitigation strategies/benefits are apparent to all stakeholders	Avoid imposing a specific cultural work ethic (hard to do when you have a timeline)		
Deciding for the community on what they need +1	Avoid meetings during working hours +1	Limiting community feedback to a specific scope (transportation electrification) when they may want to share about broader priority concerns.	Don't start this work and then drop it if grant funding ends +1		Avoid ignoring local potential (future local partnerships and address challenges that hinder their development)			
Presentations that emphasize education and listening only +1								
	Avoid overly technical language and jargon							



Workshop 2

Community Agreements


RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making April 4, 2024

Drag and Drop (or copy/paste) +1 +1 +1 +1 +1 +1 +1

Prompt: Are there any questions or concerns about the current community agreements? Are there any that should be added/revised?

RCPWG Interim Community Agreements

	Participate in discussions effectively and respectfully	Notes will be taken for decisions and project-management support	Avoid using technical jargon and acronyms, when possible
+1 Step up, step back	Provide space for all to engage with an open mind	Broadly use the consent approach to decisions	If technical jargon is needed to be used, explain the jargon. Sometimes it is necessary to use technical terms to get a point across.
		Take care of yourself	please tell us if/when there are any terms that are jargony



San Benito County

RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making April 4, 2024

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Scheduling Meetings

What is considered the range of concise and focused meetings? (e.g., 60-90 minutes?)

Longer 90 min meeting with breaks. +1

60 minute preference for select attendance.

Important to have time to hear all parties and have time as a group to reflect and go deeper as well as build relationships.

What scheduling tools are best to identify the best meeting times? (e.g., via email, Doodle poll, When 2 Meet, Google poll, etc)

No preference.

What is the threshold for including breaks into agendas? (e.g., meetings over 90 minutes?)

Short break is welcome for a 90 minute meeting.

Are there general days / times to avoid with your organization? (e.g., existing board meetings, regular department meetings, regular events?)

Every other Tuesdays are Board of Supervisors days for County of San Benito.

Fridays should be avoided after 2pm

Mondays - County RMA staff afternoon booked staff meetings

RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making April 4, 2024

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Providing Feedback

Expectations/considerations for reviewing RCPWG materials

How much time do you usually need for review of substantial materials (i.e., more than 5 pages)? (material examples: grants, proposals, summary documents) (time commitment example: 1-2 weeks?)

Depends on type of material reviewing. Example grants and proposal could take longer with several review channels.

Depends on complexity of the content, expectations for advance preparation (e.g., answer questions), and the individual's schedule. 1-2 weeks should suffice.

How much lead time do you need? (e.g., 1 month warning in advance that the materials are coming?)

1-2 weeks with reminder the day before.

Bigger packet (15+ pages) with required activities = more time (2 weeks)

What is the preferred way to provide feedback to RCPWG during meetings? Please consider verbal (open sharing, raised hands) and nonverbal opportunities (other tools like Jamboard, polling, email).

Ex: Person of color facilitating

multi-approach is good to meet all needs.

Open share out with the larger group.

Have a first read, then second read to finalize/opportunity to deepen understanding of what is being said.

Circle speaking where space for all to provide feedback and share - OK to pass and if pass get a chance to reflect at the end,

For consideration:
 Would it be beneficial to meet with CBOs-only in a breakout and then report back to the broader RCPWG?

RCPWB breakouts preferred with County partners/CBOs

May provide CBO learning across county lines by connecting with other CBOs just starting to get involved in climate

RCPWG

Monterey Bay Area Regional Climate Project Working Group

RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making

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April 4, 2024

Clarifying Questions

Two of the recommendations during the last workshop mentioned "marginalized" communities. How can we best characterize (or define) communities you represent and/or CBOs participating within RCPWG context? (e.g., marginalized, historically under represented or under-served, social service CBOs, disadvantaged?)

If RCPWG is intended to encourage diverse participation and discussion, edit "including youth voices and students, the science community, and women" to include:

indigenous communities, LGBTQ+, people with disabilities, ethnic and racial minorities, faith-based minorities, immigrant populations

low-income or economically disadvantaged communities, rural communities, non-native English speakers, older adults (etc.)

So diverse organizations representing diverse marginalized community groups see themselves represented in the charter.

Definition: Frontline communities are those that experience the "first and worst" consequences of climate change.

Are there other words or phrases we should consider defining?



Santa Cruz County

RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making

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April 4, 2024

Compensation

How important is compensation for meetings/activities facilitated with an organization you? (We noticed requests for compensation...)

Compensation for expertise through lived experience, education, or relationships w/ community, should be compensated. And more equitably so than govt. agencies

If the person attending is a staff member for an organization that they are representing, then I think the organization should be compensated, not the individual.

+1

Existing funding is tied to existing deliverables. Expanding capacity (new deliverables) to seat at tables requires replacing other funded activity with additional staff.

It depends on how closely the work with RCPWG is tied to our mission, but in general compensation is very helpful

Consider provide the ability to opt-in or opt-out of compensation

Our agency policy is to prioritize compensating the agency

I would not expect my organization (government) to be compensated for attending these meetings, however work-products that come out of this may need funding

It may be better if organizations were provided funding for the individuals time spent on this effort to help offset costs.

If representing an agency, the agency should be paid. If representing as an individual (community member), individual compensation may be merited

+2

While planning for grants/activities we want to ideally provide sufficient funding, but we know it's not always the reality. If there are not enough funds to compensate all interested organizations as participants in the RCPWG, how should the RCPWG proceed? (Discuss, and include thoughts in stickies)

Potential option: Evenly distribute available funding across all interested participants, regardless of compensation amount

Potential option: Restrict number of CBO participation to match the funding available

Some organizations have multiple staff attending - maybe funds are only for 1 staff member and others can attend with their own funds?

+2

You can look at levels of engagement, consider sliding support based on org size (larger orgs may less than grass roots orgs)

Prioritize funding orgs/ reps that represent communities usually left out and whose voices need to be included

+1

For equitable access, I think CBO's should be prioritized for compensation (as opposed to govt agencies)

Some organizations may have their own internal and grant funding that they can use. Should ask organizations what the need is when developing the app.

What range of compensation is appropriate for participating in a 90-minute meeting?

We do \$200/90 min for community members where prep is involved. Remember staff compensation varies by role/agency. And our rate is one-off ; not projects

As an example: CoSC climate program offers \$100/90 minutes currently for E3 groups

\$100 for a 90 minute meeting seems reasonable

County of Santa Cruz offers \$75 stipend per meeting to public members of County Commissions. Meetings typically last 2 hours.

A meeting is not only the meeting time, but the prep and follow ups. For meetings of this level of engagement, stipend vs hourly rates make more sense.

+1

X

Are there other considerations to keep in mind related to compensation?

IF CBO have opportunity to include community members, participants should be compensated with cash options to include undocumented individuals

+1



RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making April 4, 2024

Scheduling Meetings

Drag and drop (or copy/paste):

What is considered the range of concise and focused meetings? (e.g., 60-90 minutes?)

- we heard from last meeting, folks wanted "concise and focused" meetings.
- 60-90min.**
- It depends on the frequency and amount of information shared. Prefer a 90 minute meeting if once a month. No more than 2 hours for any meeting
- 60 - 90 minutes generally, but it depends on the topic and how important it may be to take more time.
- 60 minutes**
- 60-90 but I would err on the side of 90 for scheduling because it is not unusual for meetings with this many participants to run over
- 90 min allows for folks to participate/ask questions and dig a bit deeper when a meeting is focused. 60 min sometimes feel too quick.

What scheduling tools are best to identify the best meeting times? (e.g., via email, Doodle poll, When 2 Meet, Google poll, etc)

- Not email** +1
- Doodle polls** +1
- Doodle Polls, When 2 meet are generally good platforms** +1
- They're all functionally equivalent to me** +1

What is the threshold for including breaks into agendas? (e.g., meetings over 90 minutes?)

- 60 min** +1
- 90 minutes**
- 2 hours**
- 50 mins**
- over 90 minutes, there should be a break**

Are there general days / times to avoid with your organization? (e.g., existing board meetings, regular department meetings, regular events?)

- every other tuesday = city council** +1
- Monday mornings, Wednesday and Friday evenings.**
- Second and fourth Thursday of each month (City Council); third Wednesday of each month (Commission Meeting)**
- Second and fourth Tuesday for BOS meetings**
- Tuesday mornings generally = Board of Supervisors meetings**
- Friday evenings and being mindful of city council and county board meeting times.**

Farallon Strategies

RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making April 4, 2024

Providing Feedback

Drag and drop (or copy/paste):

Expectations/considerations for reviewing RCPWG materials

How much time do you usually need for review of substantial materials (i.e., more than 5 pages)? (material examples: grants, proposals, summary documents) (time commitment example: 1-2 weeks?)

- 1 week. If more than 10 pages or work to be done then 2 weeks +1
- At least a week** +1
- 2 weeks. 1 week to read, another week to get comments and opinions from other coworkers and/or community members
- Usually a week, but more time - 2 weeks are appreciated** +1
- 5 pages = 3 days, 10+ pages = at least a week.**
- 1 week minimum, but depends on the number of pages.**

How much lead time do you need? (e.g., 1 month warning in advance that the materials are coming?)

- One month** +1
- 2 weeks of lead time** +1
- two weeks lead time minimum.**

What is the preferred way to provide feedback to RCPWG during meetings? Please consider verbal (open sharing, raised hands) and nonverbal opportunities (other tools like Jamboard, polling, email).

- Ex: Person of color facilitating**
- Chat, verbal, reactions (thumbs up), polling**
- Nonverbal opportunities are a good option.**
- Something similar to jamboard, taxting options, polls, etc.**
- (more for after meetings) but polls/surveys could be a good way for anonymous feedback**
- I like polling because you can get consensus. Jamboard suggestions just represent one person. Some verbal discussion is helpful but often only a few people speak.** +1
- Verbal... I'm not a fan of jam board for discussions, but if it is to capture feedback on questions, I can see its utility.**

For consideration:
Going forward in future mtgs after this workshop is done... Would it be beneficial to meet with CBOs-only in a breakout and then report back to the broader RCPWG?

- Community members, if they do make it to the table, may need time to find support/fellowship.**
- Yes, but so would having a staff member who could clarify limits and boundaries of requests.**
- I think yes. This could offer a different dynamic that could be helpful for some.** +1
- Maybe? It depends on how they feel their input/engagement is being involved/used.**

Farallon Strategies

Clarifying Questions

Two of the recommendations during the last workshop mentioned "marginalized" communities. How can we best characterize (or define) communities you represent and/or CBOs participating within RCPWG context? (e.g., marginalized, historically under represented or under-served, social service CBOs, disadvantaged?)

language in grant writing is different than the day to day language we use with our communities (echo the RFP then correct it)

use an asset frame that doesn't victimize /dehumanize folks

I describe many of the communities as underinvested or underserved

Communities that have been historically excluded from the decision making process.

lower-socioeconomic communities

Immigrants, women, working class families of color

disenfranchised

minority communities

Historically underfunded

communities impacted by historical discriminatory policies (POC, BIPOC, undocumented, etc)

ask, "is this the appropriate term?"

Climate vulnerable communities (may include remote communities, elderly communities, homeless communities, low-income)

+1

do not place the burden on EJ/CBOs; before you speak, check your lens.

Community organizations

Definition: Frontline communities are those that experience the "first and worst" consequences of climate change.

Are there other words or phrases we should consider defining?

We use rural working class families

RFP = Request for Proposal, but that might not click for everyone that does not work with grants. Application makes more sense.

AAA thank you ;)

I don't have a concrete example, but maybe we can develop a term that directly correlates racist policy to current disproportionately vulnerable communities.



Are there other recommendations to add to the document?

Accountability on use of equity lens in preparation of grant proposals and implementation of grant funds

Check the major sources of grant funding for any governance structure requirements of the grant(s)

housing for health policy board is a good example of governance structures

Other comments or questions about the recommendations document or RCPWG in general?

Please feel free to leave questions, comments, and suggestions on this page that may arise during the meeting. We will also ask you to complete a short survey at the end of the meeting if you want to use that forum.

Our org serves all three counties, I appreciate the breakouts by county, but wondering if we have space to serve in a cross county way.

<<absolutely, pls let us know who you are and we can have you come in/out of each county breakout if you like



Monterey County

RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making April 4, 2024

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Compensation

How important is compensation for participating in RCPWG meetings/activities when you are already affiliated with an organization that is compensating you? (We noticed there is low uptake of requests for compensation in this grant project)

Important to use funding for youth and workforce development

Sows that input is valued. Funding to organizations may be cleaner so funding can be distributed

It is important to have group comp. resources are needed because CBOs are stretched. Compensation is important, but double dipping should be watched out for.

+1 +1 +1 +1

While planning for grants/activities we want to ideally provide sufficient funding, but we know it's not always the reality. If there are not enough funds to compensate all interested organizations as participants in the RCPWG, how should the RCPWG proceed? (Discuss, and include thoughts in stickies)

Potential option: Evenly distribute available funding across all interested participants, regardless of compensation amount

Process for choosing limited CBOs? Demographic and community representation? Difficulty: local govns have a tough time selections. Keep it simple. Be transparent

Potential option: Restrict number of CBO participation to match the funding available

Be upfront with funding limitations. Want to allow as many as possible. Option to pro rate based on participation.

Negative: reduces potential for participation. Orgs should be able to opt in.

Pre assess entire groups capacity and needs. Allow for subcommittee to evaluate where funding should go.

Grant writing is a significant challenge due to upfront costs and efforts, but needs to be taken seriously

Form pods or sub committees for participation on specific activities to consolidate feedback from many orgs. Comp pod leaders.

What range of compensation is appropriate for participating in a 90-minute meeting?

Valuing the CBOs as consultants, connect it to paid consultants. Connect to govvie staff time as well. Keep in mind pre-read and follow up time for compensation.

Are there other considerations to keep in mind related to compensation?

Ask how much position within org should be compensated.

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RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making April 4, 2024

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Scheduling Meetings

What is considered the range of concise and focused meetings? (e.g., 60-90 minutes?)

Depends on what needs to be accomplished. Upper limit is 45-90 minutes. 90 minutes is really a lot.

What scheduling tools are best to identify the best meeting times? (e.g., via email, Doodle poll, When 2 Meet, Google poll, etc)

Doesn't matter. But have a clear deadline for responses

What is the threshold for including breaks into agendas? (e.g., meetings over 90 minutes?)

If more than an hour, take half way break.

If in person or virtual can affect this

Are there general days / times to avoid with your organization? (e.g., existing board meetings, regular department meetings, regular events?)

CCA has Monday morning check ins

Mujeres has weekly staff meetings in the morning

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Providing Feedback

Expectations/considerations for reviewing RCPWG materials

How much time do you usually need for review of substantial materials (i.e., more than 5 pages)? (material examples: grants, proposals, summary documents) (time commitment example: 1-2 weeks?)

Two weeks is plenty. 5 pages 1 week is ok. Coordinating with team members and Board is necessary, so two weeks is good.

How much lead time do you need? (e.g., 1 month warning in advance that the materials are coming?)

Reminders and warnings are helpful. If it goes out in a specific day,

What is the preferred way to provide feedback to RCPWG during meetings? Please consider verbal (open sharing, raised hands) and nonverbal opportunities (other tools like Jamboard, polling, email).

Ex: Person of color facilitating

Polls are quick and easy.

For consideration:
Would it be beneficial to meet with CBOs-only in a breakout and then report back to the broader RCPWG?

Farallon Strategies

RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making April 4, 2024

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Clarifying Questions

Two of the recommendations during the last workshop mentioned "marginalized" communities. How can we best characterize (or define) communities you represent and/or CBOs participating within RCPWG context? (e.g., marginalized, historically under represented or under-served, social service CBOs, disadvantaged?)

Under resourced- by calling communities marginalized, reinforces disparities.

Underserved, same logic

J40 definition?

Be clear on potentially ambiguous terms like undr served

Definition: Frontline communities are those that experience the "first and worst" consequences of climate change.

Are there other words or phrases we should consider defining?

Farallon Strategies

Workshop 3

Breakout Room for CBOs participating in USDN Workshops

RCPWG - Advancing Equitable, Shared Governance for Monterey Bay Regional Climate Investment Decision-making May 6, 2024

Potential Governance Modifications

RCPWG
Monterey Bay Area
Regional Climate Project Working Group

Option 1: CBOs participate as RCPWG advisors

CBOs participate as RCPWG Advisors, as outlined in the current charter

1. Based on funding available, there may be a **maximum number of CBOs that can be compensated to attend RCPWG advisory meetings.**
 - a. There will not be a maximum number of CBOs welcome to attend the meetings.
2. **CBOs advise on RCPWG activities**, based on needs of their community, in an ad-hoc advisory capacity.
3. **CBOs are eligible to serve as funded outreach partners** (contracted in grants to conduct community engagement), but are not expected to serve in this capacity.
4. **CBOs may sit on and advise RCPWG subcommittees or grant-specific work groups.**
 - a. (Subcommittees meet infrequently, on an as-needed basis, on specific grant opportunities. For example, in 2022-2023, there were two subcommittees formed to discuss current grant opportunities: the transportation and building electrification subcommittees).

RCPWG
Monterey Bay Area
Regional Climate Project Working Group

Option 2: CBOs nominate/elect a representative

CBOs nominate/elect a representative to serve as an advisory RCPWG member

1. **One representative CBO member serves as RCPWG Advisor, and attends RCPWG meetings on behalf of CJC members/other CBOs:**
 - a. CBOs can nominate a representative, or CBOs could rotate through as an advisor to RCPWG;
 - b. CBOs could leverage the CJC (or another working group) to discuss RCPWG activities as a group, separately from the RCPWG;
 - c. Consolidated recommendations of the CBOs would be brought into RCPWG consideration via their representative.
2. **CBO representative would sign commitment letter** indicating their commitment to advising the RCPWG as a nominated/elected representative of the CBOs, including a commitment to:
 - a. RCPWG meeting attendance and engaging in discussions as outlined in (1) above; and
 - b. Following ground rules/community commitments formed through the process.
3. **CBO representative is eligible to make proposals and discuss proposals**, but is not eligible to vote.
4. **Other CBO individuals/organizations could serve on other subcommittees or grant-specific work groups**, pending funding availability.

Qs and Concerns

Op1 gives opportunity to be part of larger strategy in the region and work with other orgs

How many advisors would we want? one rep for each subcommittee?

Potential conflicts in competitive funding

Could move forward with Op 1, and reevaluate for an Op 2 with potential funding coming through

Potential Option 3 - Use #2, but keep meetings open to everyone when there is interest

CBOs could be on an email list and drop in when interested, focused on grants

Both - what CBOs, populations/values should be joining? CBOs may be in equity but not necessarily climate (CJC helps narrow down). Be clear about which CBOs

Would there be a dedicated RCPWG member to support the CBOs? (helpful if multiple reps, moving parts)

Funded for participation? what is the infrastructure in place for the representative? e.g., funding available for attending mtgs + reporting back?

What does building capacity look like? the representative would build capacity/support RCPWG members. See value in rotating representatives, but how does compensation look

Risk in #2, since future unknown about CJC as a different group

How do we move forward with limited funding, while getting representation from different orgs/regions?

If input/guidance of CBOs, would need to be paid for their time/coordination/assessment

How do we select the rep?

Could be one CBO representative per county?

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