

Community Economic Resilience Fund
Bay Area High Road Transition
Collaborative (BA-HRTC)
Planning Phase Plan
Submitted June 14, 2023

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Executive Summary

The BA-HRTC vision and guiding principles are the underlying approach to the organization, process, and proposals we are developing to accomplish the CERF Planning Phase goals. The Planning Phase Plan is a working document that will be revised as the Bay Area HRTC learns and develops new approaches to best meet the goals and vision of CERF. A copy of this plan will be shared on the Bay Area HRTC website.

Vision

To re-envision regional economic development planning, centered around the values of equity, high-road employment, sustainability and climate resilience, and shaped by workers and impacted community members themselves.

Guiding Principles

1. Climate Resilience Led by Frontline Communities and Workers
2. Lift Up Job Quality, Grow High-Road Jobs, Elevate Racial Equity and Worker Voice
3. Honor Local Without Losing the Power of the Region
4. Inclusive, Democratic, Grassroots Governance
5. Take Action Towards Transformational Change

With these principles at the forefront, the BA-HRTC—led by All-Home as the Regional Convener and Bay Area Good Jobs Partnership for Equity (BAGJPE) as the Fiscal Agent—has established a Governance Structure, which includes:

- A Steering Committee, composed of 21-members across essential planning sectors,
- A Research, Planning and Community Engagement Committee led by the UC Berkeley Labor Center, and
- (6) Sub-Regional Tables organized by geography.

BA-HRTC partnerships have continued to grow through email communication, stakeholder virtual convenings, and online interest forms. The BA-HRTC has begun developing processes for its outreach and engagement plans, focusing on engaging members directly; applying intentional strategies such as focus groups, surveys and educational materials; and building inclusive practices for participation. As our collective partnerships continue to grow we will apply new strategies and collaborations to continue building inclusive processes; particularly for growing the voices of CA Native American Tribes at all levels. The BA-HRTC has engaged with different groups but has not been successful in filling a Steering Committee seat with a tribal organization representative. Our efforts are ongoing, and we will continue collaborating with

the State and other groups to lift up this need. While plans are being developed, we understand that strategies outlined and tactics may evolve and change as we listen and learn from community members and identify groups that are missing from our current practices. The BA-HRTC recognizes that to successfully deliver on the goals of CERF to build an equitable, sustainable, and resilient economy across our diverse State, our collective work needs to acknowledge the challenges and tensions of today's economy. Strategies and solutions to reduce inequity, address the wage gap, and prevent experiences of homelessness due to job loss and high cost of living that we see today, need to be a part of larger structural strategies we're planning for the future. The CERF program set out to accomplish something new and challenging, and addressing this tension of tackling worker and community needs today while planning for longer term systemic change is a part of that challenge. This is an area the BA-HRTC has discussed and will continue to explore particularly through our outreach and community engagement. Meaningfully engaging with communities and meeting community members where they are will require a balance of providing shorter-term solutions while strategizing for the longer-term changes we need. We envision this requiring another level of collaboration with key stakeholders to change the way our communities, stakeholders, and systems interact with each other. While a challenge, the BA-HRTC is exploring ways current resources and partnerships can apply to some of the community needs today, while still engaging in the longer-term strategy planning.

As the BA-HRTC continues to refine its approach to community engagement, and other processes, we will incorporate methods that are transparent and inclusive of the realities many workers and communities are experiencing today.

BA-HRTC Regional Convener and Fiscal Agent

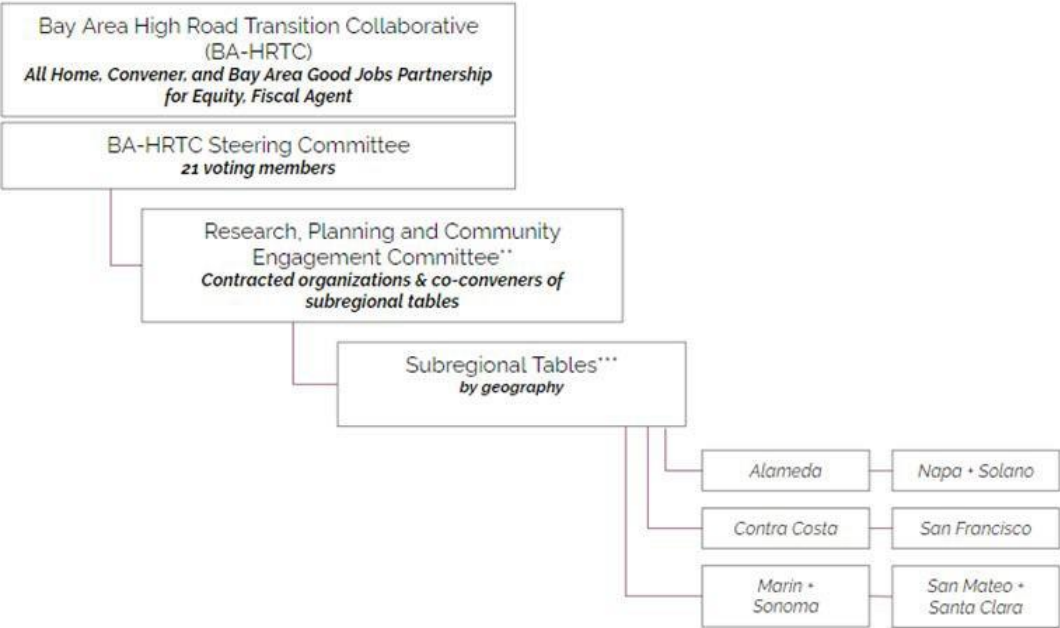
All Home is the Bay Area High Road Transition Collaborative (BA-HRTC) Regional Convener. All Home advances regional solutions that disrupt cycles of poverty and homelessness, redress racial disparities, and create more economic mobility opportunities for people with extremely low incomes. All Home convenes policymakers and community stakeholders supporting these objectives to align goals, initiatives, outcomes and measurements across jurisdictions. All Home is well suited to represent the CERF Region because of its track record of leading cross-sector planning efforts and its proven ability to center issues of equity and economic opportunity in policy and systems change work. All Home is known throughout the Bay Area and can leverage its previous work and reputation to build inclusive tables. As convener of BA-HRTC, All Home will provide staffing support to BA-HRTC and coordinate contracted research partners and facilitation, technical assistance, and other consulting support.

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The Bay Area Good Jobs Partnership for Equity (BAGJPE), an association of ten workforce development boards (WDBs) and regional workforce planning units across the nine-county Bay Area region, will be the Fiscal Agent for BA-HRTC, with the San Francisco Office of Economic and Workforce Development (SFOEWD) as the Fiscal Lead. BAGJPE – an association with one hundred percent of boundaries overlapping the Bay Area CERF region – includes Alameda County WDB, Sonoma County WDB, WDB of Contra Costa County, NOVAworks, Oakland WDB, Richmond WDB, WDB of Solano County, work2future, SFOEWD and Workforce Alliance of the North Bay (Marin and Sonoma). BAGJPE/SFOEWD will provide contract administration staffing and infrastructure to BA-HRTC.

Governance Structure

The BA- HRTC has developed and approved a governance structure that is representative and inclusive of stakeholders across the region. Our approach has included a few steps to develop the following structure and we are continuing to refine processes as we learn more about the needs of the communities.



Prior to formalizing the Governance Structure, an initial group of stakeholders convened by All Home led the process from October 2022 through March 2023 by:

- Developing a Proposal Development Working Group to work on the details of the application and proposal and begin coordination amongst many groups. The group consisted of representation from all CERF stakeholders listed in the State SFP.
- Holding recurring meetings to compose the BA-HRTC application. Meetings included:

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- Community and equity meetings to discuss values, principles and community engagement strategies.
- Subject matter expertise interviews with different sectors to discuss existing regional planning processes in place, geographic representation and equity in decision-making and community engagement plans.
- Public listening sessions for all interested stakeholders to learn about the CERF program and the BA-HRTC plans for submitting a proposal.

Based on these conversations, the Proposal Development Working Group agreed to put into practice our goals and approved in March 2023 a Governance Structure that includes a Steering Committee, a Research, Planning and Community Engagement Committee, and Sub-Regional Tables, all communicating with and rolling up to the overall BA-HRTC Regional Convener.

Summary of the Formalized BA-HRTC Governance Structure

While the Governance Structure includes many stakeholders, the BA-HRTC developed this structure because we are committed to developing an inclusive and equitable process. It's important to hold ourselves accountable to the communities we aim to serve and the best way to do that is to put into practice the guiding principles the BA-HRTC established. The BA-HRTC Governance Structure includes:

1. Creating an inclusive table that includes a 21-member Steering Committee reflective of the stakeholder groups listed in the SFP proposal. Doing so ensures that we have inclusive voices and communities represented in the planning phase.
2. Develop equity-driven roles and responsibilities for the Steering Committee starting with sector representation, a clear purpose of why the seat is needed, and the overall responsibilities the member will commit to.
3. Centering worker voices by developing Sub-Regional Tables that will represent the stakeholder groups outlined in the CERF SFP.
4. Maintaining equitable and inclusive practices at all levels by establishing a flat organizational structure, open communication channels that remove power dynamics, consistent feedback, opportunities for members to support and lead projects and working groups, and space in all meetings for discussion, disagreement, and collaboration.

BA-HRTC Communication Channels

While continuing to build a robust governance structure, the Bay Area HRTC has developed a few strategies to maintain accountability and create consistent communication to inform people of opportunities to get involved and gather feedback. Strategies thus far include:

- **Monthly stakeholder meetings:** Updates on ongoing work the HRTC is advancing such as progress on the Regional Plan Part 1, Sub-Regional Table development and any State updates along with timelines, deliverables and opportunities to get involved. This monthly meeting is also a space where the HRTC gathers feedback and ideas on items being discussed. For example, initial outreach to tribal communities began with asking stakeholders to share any groups, individuals or organizations we should engage with; community engagement frameworks were presented and questions, suggestions and new resources were solicited that are now being discussed by the community engagement working group, and the research Regional Plan Part 1 requirements were presented feedback, questions and resources were solicited which are now being more explicitly connected to other aspects of the planning phase.
- **Bay Area HRTC website:** The website is a main resource for interested stakeholders to sign up for emails, find information about the steering committee and sign up to become a partner of the Bay Area HRTC. The website is updated to share new information and opportunities to get involved.
- **Online interest form:** The Bay Area HRTC Signatory form is the primary method that individuals and organizations can sign up to either join a Sub-Regional Table and/or receive email updates from the Bay Area HRTC. These forms also allow for additional comments, questions and suggestions. Submissions are reviewed by the Regional Convener and outreach is conducted based on additional comments shared.
- **Sub-Regional Tables:** Sub-Regional Tables will be the primary location where more involvement, contributions and input are discussed and incorporated into the overall HRTC goals and direction.
- **Additional opportunities:** As the HRTC continues to expand and the Sub-Regional Tables engage with more local groups and community members, additional opportunities to get involved at different levels of the governance structure will emerge, such as joining-Steering Committee meetings as non-voting members or Research Planning and Community Engagement Committee. As opportunities arise, the HRTC Steering Committee would discuss and bring to the stakeholder meetings for feedback to ensure there is interest and that we have established clear roles and input for members to attend with a clear purpose and not solely for observing or listening. These opportunities will be communicated through virtual stakeholder meetings, Sub-Regional tables, email communication and additional communication as needed.

Going forward, the Steering Committee is continuing to collaborate with groups to fill the tribal organization vacancy on the Steering Committee and bring more voices of the CA Native Tribal

communities to the collaborative. Details on each of the committees in the Governance Structure are listed below.

BA - HRTC Steering Committee

1. 21-member Steering Committee. Each Steering Committee member may elect an alternate to serve with them in the cases that they are not able to attend. All alternates identified are added to all communications sent to the Steering Committee and calendar invitations. Members are invited to, not required to attend every meeting. In the case that both the member and alternate attend the meeting, alternates should observe only to create space and time to encourage all members to engage in the conversation. Only one person is able to vote when/if both member and alternate are present during the meeting.
2. Three Steering Committee members serve as Co-Chairs for the group, working closely with All Home, the Regional Convener.

BA-HRTC Steering Committee Bylaws

To encompass equity and inclusion in our Steering Committee, the BA-HRTC has developed the following accountability practices:

1. Establish and approve bylaws that outline a few key aspects to maintaining an inclusive structure. Some of these bylaws include: establishing meeting processes, quorum necessary for items requiring a vote, agenda setting, meeting frequency and facilitation, thorough decision-making process and defining working groups when needed.
2. Creating working groups of Steering Committee members. To engage and strengthen the team, working groups address discrete topics requiring more attention, such as bylaw development, budget planning, and resource modeling. This structure allows the group to dive deeper into specific areas of planning, allowing for more recommendations and hearing other perspectives that may not have been discussed. This has allowed the core group to leverage its capacity and build a more inclusive planning process. We intend to continue using this working group format to accomplish tasks.

BA-HRTC Meeting Cadence

To hold ourselves accountable in all our processes and create communication channels between all parties involved, the Steering Committee has approved this meeting cadence:

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1. Regional Convener and State representative: biweekly meetings to align on requirements and technical assistance.
2. Regional Convener, Fiscal Lead, and State representative: monthly meetings to align on requirements and technical assistance.
3. Regional Convener and Fiscal Lead: weekly meetings to review any financial needs, monthly reports, alignment with project goals, and general support.
4. Full Steering Committee: bi-weekly convenings to discuss, plan, and advance the Planning Phase Plan work.
5. Regional Convener and Steering Committee co-chairs: bi-weekly meetings.
6. Research Team, Regional Convener, and Fiscal Lead: monthly meetings to discuss, plan, and advance the Research Plan work.
7. Stakeholder convenings: monthly meetings with the full BA-HRTC and all interested parties in the Bay Area.

Meeting frequency has been balanced with recurring standing meetings between the Regional Convener, Fiscal Lead, Co-Chairs, State Representative and Research, Planning and Community Engagement Committee. Doing so has created open lines of communication and created opportunities for cross-collaboration between groups.

	Mon.	Tue.	Wed.	Thu.	Fri.
Week 1			Monthly Stakeholder meeting Fiscal Lead <>Regional Convener check in		
Week 2	Meeting with State	Co-chair meeting	Fiscal Lead <>Regional Convener check in		HRTC Steering Committee Meeting
Week 3			Monthly research team <> Regional Convener check in Fiscal Lead <>Regional Convener check in		
Week 4	Meeting with State	Co-chair meeting	Fiscal Lead <>Regional Convener check in		HRTC Steering Committee Meeting *Research team update

Decision-Making Process

In alignment with our principle of creating an Inclusive, democratic, grassroots governance process the BA-HRTC has approved a two-step process for decision-making. The Bay Area HRTC was intentional in creating a decision making process that allows the group to not only make a decision but also move forward together, a process that builds and strengthens the collaborative and a process that would create solutions for as many people as possible. It was

agreed that a two-step process would be best to capture input and final vote. The process includes:

Step one: Six-Scale Gradients of Agreement: The Gradients of Agreement Scale is a best practice tool used for decision-making in large group settings. We have applied the Gradients of Agreement tool to align with our needs and agreed on the scale of 1- 6. Each scale has its own description, allowing members to vote across a continuum. Using this tool, we are creating an inclusive and equitable process that allows everyone to share feedback on their response, represents all voices, and requires input so silence isn’t interpreted as ‘in agreement’. The purpose of using the Gradients of Agreement is to gather a general sense of alignment and allow further discussion and refinement of the topic being discussed. Final decisions are made via an ‘up or down.’ The scale for which members are voting on is as follows:

	Scale	Interpretation
1	Strongly Agree	I fully support this proposal
2	Agree with reservations	I am mostly satisfied and can support this proposal
3	Neutral	I will go along with the will of the group
4	Disagree	I have serious reservations
5	Strongly disagree	I object to this proposal
6	Abstain	I am not in a position to take a position on this proposal

The Six-Scale Gradients of Agreement will continue to be used during meetings where proposals are presented and discussed for a vote by the Steering Committee. This process allows the group to quickly gauge the concerns, support and importance of the proposal being voted on and build a solution based on these results.

As the planning phase continues and we prepare for projects to be proposed, the gradients of agreement scale may be adjusted to better reflect the needs and items requiring votes; the BA-HRTC Steering Committee has established a process, outlined in the bylaws, for any amendments necessary.

Step two: Up or Down Step 2 is an up-down vote in which all members share their final vote on the proposal being discussed. Final decisions are made via an “up or down” vote. A motion will be approved if it receives a simple majority of “yes” votes. Abstentions will not count toward the total number of votes when calculating a simple majority.

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As the Regional Convener and the Fiscal Agent are facilitating the process, only representatives of Steering Committee members are able to vote and each organization is allowed only 1 vote. The decision is not final until every member present at the meeting has registered their position.

Acknowledging the challenge of decision-making in a large group requires time and effort to revise our practices and approach while still maintaining a collaborative process. As the HRTC continues to build its governance structure and develop the Sub-Regional tables, the feedback channels between Sub-Regional table co-conveners, Steering Committee members and stakeholders leading up to the Regional Convener will allow for reflection, changes and revisions to the decision-making process.

Research, Planning and Community Engagement Committee

The Research, Planning and Community Engagement Committee is not yet fully established. As of now, the BA-HRTC has contracted with the UC Berkeley Labor Center to lead the Regional Plan Part 1. However, the BA-HRTC plans to develop this committee with the Sub-Regional Table co-conveners and will be developing this plan in Quarter 1.

Regional Plan Part 1

The BA-HRTC has started the Research, Planning and Community Engagement Committee contracting with the UC Berkeley Labor Center to lead the Phase 1 Regional Summary work. Currently, the full research team consists of:

Role	Group	Scope
Research Planning and Community Engagement	UC Berkeley Labor Center	Economy and labor market analysis
Research Planning and Community Engagement	Human Impact Partners	Public Health analysis
Research Planning and Community Engagement	Center for Law, Energy and the Environment, UC Berkeley Law	Climate and environmental impact
Research Planning and Community Engagement	Bay Area Council Economic Institute	Industry cluster analysis
Research Planning and Community Engagement	Chris Benner, Ph.D.	Stakeholder mapping
Research Planning and Community Engagement	Additional contracts and stakeholders as needed	Community input, feedback, partnership development with community members

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Understanding that this component of the planning phase is crucial to inform the roadmap in Part 2, the BA-HRTC will be strategic and intentional about how to include various stakeholders throughout the process. Our approach includes:

1. Monthly meetings between the regional convener and research team to support as needed and measure progress towards overall goal
2. Monthly presentation to the BA-HRTC Steering Committee to create space for feedback, accountability, and partnerships with new groups we may not be in alignment with yet
3. Monthly presentation to the BA-HRTC Stakeholder group to ensure clear communication and opportunities to participate are publicized.
4. The UC Berkeley Labor Center will meet with all BA-HRTC Steering Committee members to gather input, feedback and collaborate on necessary analysis or tasks
5. Hold small convenings of subject matter experts specific to a topic area for the research analysis
6. Once Sub-Regional Table Co-Conveners are established, the research team will meet with those individuals and identify additional groups and communities to engage with. The 12 Co-Conveners will also be a part of the Research, Planning, and Community Engagement Committee

The research team's collaboration with various players is in line with our guiding principles to “Lift Up Job Quality, Grow High-Road Jobs, Elevate Racial Equity and Worker Voice and Take Action Towards Transformational Change.” The regional summary will provide a foundation for how the region can best identify projects and opportunities to build a strong economy. Consistent communication with stakeholders and Steering Committee members allows for ongoing discussions after Part 1 is complete that advances the goals of the collaborative to establish and create a sustainable structure that continuously puts workers at the center. Updates will be shared with the HRTC members during stakeholder meetings and email communications.

The BA-HRTC will apply learnings and practices from Regional Plan Part 1 to the Regional Plan Part 2. This will include engaging stakeholders through individual and group discussions and leveraging the Sub-Regional Tables for community input.

Sub-Regional Tables

The final element of the BA-HRTC governance structure is the Sub-Regional Tables. The BA-HRTC is committed to honoring the local without losing the power of the region. The BA-HRTC has established the structure of the Sub-Regional Tables as it was one of the best methods to ensure community voice is included throughout the process and not solely one-time

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touchpoints. We arrived at this structure by establishing the geographic division of the region being intentional about size and regional scope of the work, as well as existing economic and workforce development planning structures and relationships (e.g., Metropolitan Statistical Areas, Metropolitan Divisions, Workforce Regional Planning Units, etc.). In doing so, the HRTC has approved the following process to creating the Sub-Regional Tables:

1. The BA-HRTC identified six subregions to build the local and community member involvement in the planning phase. These include: (1) Alameda, (2) Contra Costa, (3) Marin & Sonoma, (4) Napa & Solano, (5) San Francisco and (6) San Mateo & Santa Clara. The BA-HRTC aims to have the Sub-Regional Tables launched by the end of the first quarter.
2. Establish a general structure for each Sub-Regional Table applying equitable practices such as shared leadership, clear roles and responsibilities for co-conveners, and principles for inclusive representation from all groups. The BA-HRTC has approved the following Sub-Regional Table structure:

Role	Scope
Stakeholders and community members	Flexible membership to meet the needs of the subregion and to include different perspectives. Members join and contribute their expertise given their knowledge and experiences. Groups that cross multiple Sub-Regional Tables can choose which table to participate in. All stakeholder groups identified in the SFP will be invited to join the table and consistent outreach will be crucial.
Two Co-Conveners per table. (1) local Labor Council (1) Community Based Organization *addtl. Co-conveners as needed	To create a shared committee leadership, the BA-HRTC agreed upon two Co-Conveners for each subregion. Together, these groups will build a diverse table and lead the group in the planning phase. Co-Conveners will also sit on the Research, Planning, and Community Engagement table to create clear communication channels between all parties
One representative from a workforce development board	A representative from a BAGJPE workforce development board will be present at each table.
One to two HRTC Steering Committee members	To continue the feedback loop and accountability to our goals, Steering Committee members will sit at each Sub-Regional Table and offer guidance and support throughout the process.

3. Nominate and approve co-conveners for each Sub-Regional Table as follows:

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- The Steering Committee shall make initial nominations for co-conveners in each region, with preference for organizations who have been engaged in BA-HRTC. Acknowledging the time and scope to establish the tables and launch the groups in sufficient time to meaningfully engage at the subregional level and develop projects, all Steering Committee members will take the lead to nominate and meet with different groups in their region.
 - Governmental or quasi-governmental agencies may participate at Sub-Regional Tables, but are not eligible to be Co-Conveners.
 - Steering Committee members who are based in each subregion will take the lead in meeting with prospective CBO Co-Conveners and discussing the co-convenor role. The nomination process includes:
 - Steering Committee members reach out to various groups and organizations, sharing information about the Bay Area HRTC, Sub-Regional Tables and co-convenor roles.
 - A final nominee will be made based on: their ability to execute the roles and responsibilities of Sub-Regional co-conveners, to lead a coalition that centers equity and diversity and to execute on the HRTC's vision of deep and meaningful community engagement.
 - Central Labor Councils based in each sub-region shall either serve as labor Co-Convenor, or nominate a labor organization to serve.
 - If multiple eligible organizations are nominated, want to serve as Co-Convenor in a sub-region and are willing and able to commit to the role, those organizations should meet together with the labor Co-Convenor, and any interested Steering Committee members, to try to build consensus.
 - Nominated co-conveners are invited to complete an application outlining how they will collaboratively advance the goals and vision of the Bay Area HRTC.
 - The Regional Convenor will hold orientation sessions for nominated co-conveners to provide an overview of the role and answer questions nominees may have.
 - Completed applications are received and reviewed by the Regional Convenor, fiscal lead, co-chairs and Steering Committee members and meet with each nominee to review the application and ensure co-conveners are able to advance the goals of the Bay Area HRTC.
 - For regions with vacancies, the Steering Committee shall develop a streamlined application process for potential co-conveners.
 - Co-Conveners will be approved by the Steering Committee.
4. Establish Sub-Regional Table co-convenor role and responsibilities. As part of building a strong governance structure, the BA-HRTC reviewed and approved roles that co-conveners

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will play at the Sub-Regional Table. Doing so creates transparency, removes power dynamics and allows all members to intentionally participate in the Sub-Regional Table. Sub-Regional tables are asked to recruit members to the table that are reflective of the stakeholder groups listed in the CA CERF SFP. As tables get developed, co-conveners, with support of the Steering Committee members and BAGJPE members, will ensure that there is diversity across organizations, geography and stakeholders and apply practices for ongoing engagement from multiple groups.

- 5. Understanding that each Sub-Regional Table will have different processes and structure that reflect the needs of that sub-region, below is just an *example* of how Sub-Regional Table Co-Conveners may plan the sub-regional kickoff and interact with the Steering Committee throughout the process.

Objective	Role of BA-HRTC	Needs/Barriers	Timeline
Discuss roles and responsibilities b/w each Co-Convener	Provide guidance on outcome & deliverables		May 2023
Set meeting cadence and schedule for co-convener			May 2023
Develop plan and structure of Sub-Regional Table	Provide guidance		May 2023
Set date/time for first co-convener meeting	Support and be informed of meeting	Date needed asap for advance planning	May 2023
Draft 1pgr on Sub-Regional Table that can be used to invite members	Collaborate and include signatory form process		May 2023
Begin initial invitation and partnership development	Connect with Steer. Comm. contact, provide list of organizations already expressed interest	Brainstorm invite list based on sector and location	May 2023
Create budget for Sub-Regional Tables	Collaborate and support		June 2023
Sub-Regional Table kickoff meeting	Support and be informed of meeting		June 2023

Outreach and Engagement Plan

The BA-HRTC outreach and engagement plan vision and principles remain the same.

Vision

“Meaningful engagement” means engagement designed to build a durable and lasting structure for community planning – not just “box checking,” asking for “one off” input from the community or asking for input at the end of the process to get a sign off on the final plan. Part of this requires giving community members meaningful decision-making authority so that they are not passive participants, but rather active agents in shaping the vision for the future of their community and the region.

Principles

- Engage community members directly
- Be intentional about including marginalized communities and groups
- Meet community members where they are, physically and with respect to their knowledge about regional issues
- Address accessibility needs and design engagement to remove barriers to participation.

Outreach and Engagement Strategies, Models, and Activities

Goals	What would success look like	Potential methodologies	What we could potentially resource
1. Ensure we fulfill the vision of an equity-driven and inclusive process.	Disinvested workers are centered through the CERF process	Community and labor are taking leadership in the Sub-Regional Tables	Resourcing co-conveners from community and labor
2. To surface the needs of disinvested communities and ensure that CERF-funded projects meet those needs	1) CERF projects prioritize disinvested community needs, 2) Residents of disinvested communities who are hard-to-reach are participating in CERF-funded projects.	Co-Conveners work with CBOs within the subregion to do outreach to communities representative of the subregion, potentially through methods like surveys, deep canvassing, focus groups etc.	Work with community organizers / canvassers CBOs conduct targeted outreach to disinvested communities to best leverage resources.
3. Genuinely engage community members	Sub-Regional Tables center feedback from	Co-Conveners work with CBOs within the subregion to engage diverse	Fund participation stipends in focus

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and allow for the community to share in the decision-making process regarding what projects we move forward	disinvested communities representative of the region when recommending CERF projects	communities representative of the subregion, potentially through workshops, focus groups or other methods to seek input or generate proposals for workforce programs. Participants will be educated about the scope of CERF. There should be attempts to fill any gaps in representation.	groups as well as resources organizations to run focus groups / workshops
4. Surface, empower and build capacity for equity-driven leaders within our community so that new leaders can be generated.	New leaders from the community would be leading this process in future iterations of CERF	Build organizing capacity by hiring more organizers in CBOs to expand outreach in disinvested communities, and to train and develop new leaders in the community, and bring them into Sub-Regional Table meetings.	Resource CBOs in hiring more organizers to expand outreach and leadership development

To advance the four goals and steps listed above, the BA-HRTC has approved a community engagement approach that will be refined throughout the planning process:

1. As co-conveners get selected, they will be asked to submit an application outlining how they will ensure the vision and principles, goals and engagement will be accomplished at their Sub-Regional Table.
2. The BA-HRTC Community Engagement working group will continue to develop engagement strategies, some efforts have included:
 - o Further exploration of *Framework on Community-Driven Climate Resilience Planning*, a Framework by the Movement Strategy Center
 - o Reviewing the *IAP2: Advancing the practice of public participation*, framework and how it overlaps and contributes to some of the ideas the group has put forth
 - o Integrating aspects of the Community Health Worker model (Promotores model) into how we can advise and guide the Sub-Regional Tables to engage community members and also learn from existing CBOs engagement efforts
 - o The working group will also develop a model "to surface, empower and build capacity for equity-driven leaders..." determine how much can be funded by current CERF dollars, and create a budget that we could approach philanthropic partners with (assuming that it would require more than we currently have in our budget).

As the Bay Area HRTC continues its efforts to engage with tribal communities and establish partnerships with organizations that have existing relationships, this work will continue into the Sub-Regional tables. The Sub-Regional tables are asked to recruit members to the table that are

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reflective of the stakeholder groups listed in the CA CERF SFP, including representation from CA Native American Communities. Sub-Regional table leads will lift up any challenges they are encountering in establishing equitable representation and collaborate with the Regional Convener, Steering Committee and stakeholders to fill the gap. As the tables begin to take shape, we are still developing the processes by which monthly updates and progress is communicated. We are also still in the process of learning and understanding how to best work with and engage tribal communities. Based on any partnerships developed, the BA-HRTC will establish a strategy working with tribal communities for how we can lift up, collaborate with and support CA Native Communities.

Stakeholder Groups to Engage

Engaging different groups and community members to the CERF process is an ongoing commitment, and one we aim to push forward through all our interactions. We recognize this requires proactive and thoughtful outreach and engagement. The BA-HRTC has engaged with many groups and created an online interest form to gather more interest from the region. Based on interest form submission only, not individual peer-to-peer network or communications, the following types of groups have expressed interest and engagement in the BA-HRTC planning phase, and we will continue to grow the number of signatories in sectors that are not yet as involved.

<p>Stakeholders we have engaged with and will continue to grow in partnership with</p>	<ul style="list-style-type: none"> ● Grassroots and community-based organizations community organizers, and community member organizations ● Government agencies ● Environmental justice organizations ● Organizations working with disinvested communities ● Economic development agencies ● Education and training providers ● Labor organizations (in addition to co-convener roles) ● Representatives from larger counties including Alameda, San Francisco, San Mateo, Santa Clara and Contra Costa counties
<p>Grow the number of signatories to the HRTC in the following stakeholder groups.</p>	<ul style="list-style-type: none"> ● Philanthropic organizations ● Worker centers ● California Native American Tribes ● Employers, businesses, and business associations ● Representatives from smaller counties and cities including Napa, Marin, Sonoma, Solano

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Strategies to engage stakeholders not already present:

- As part of the data gathering and analysis process conducted during Phase One, the HRTC will use data to identify communities that are not benefiting from current economic development efforts and making a plan to engage with those specific communities.
- Leverage existing partnerships and organizations that work across many counties to build partnerships where representation is less active.
- Work closely with Sub-Regional Tables to learn which groups are missing and need to be involved and how to meaningfully engage with them.
- Develop relationships with community assets (e.g., individuals with community capital) to build trust and bring in communities who have been historically excluded, marginalized, or are otherwise distrustful of public process.
- Create or leverage existing community assets (e.g., communication channels, provider resources) to disseminate information which is accessible and current.
- Steering Committee members lead in identifying groups in their region.
- Develop clear processes for engagement and how to sign up for a Sub-Regional Table.

To ensure we are reaching a wide number of people, we will aim to have three levels of engagement:

Level	Scope	Strategies
High	Aim to engage 750 participants, in-depth and ongoing engagement in the process, through sharing, learning and planning for CERF. Participation will vary by Sub-Regional Table.	-Co-convenor leadership outreach -Communication strategies that include summary page, goals, how to get involved, why and what it means to participate -Dedicated individuals/groups at the Sub-Regional Table for consistent engagement
Medium	Aim to have at least 2,500 participants engaged in a lighter-touch engagement (one-time meeting attendance, survey response), also including being aware of and attending monthly stakeholder meetings and building collaborative partnerships	-Increase attendance during monthly stakeholder meetings -Offer presentations to groups for greater alignment and knowledge sharing -Improve website to include more resources, and ways to get involved
Low	Aim to have a least 10,000 participants that will be aware of the CERF process through membership briefings by stakeholder organizations, emailed updates, and social media	-Develop any online/social media presence to keep the region updated on process -Develop regular newsletter to distribute with all stakeholders

Removing Barriers to Participation

Approaches to be taken by the BA-HRTC remain the same as outlined in our application but will be adjusted based on new learnings, partnerships and developments

- Scheduling meetings at times when people are available (weekends, evenings)
- Providing Chromebooks and digital literacy training for virtual meetings
- Providing food and childcare at in-person meetings
- Providing compensation to individuals for attendance at meetings,
- Providing simultaneous translation and materials in relevant languages
- Providing accommodations for people with disabilities; including ensuring meetings are held in accessible locations
- Meeting in person and/or virtual within the constraints imposed by COVID
- Identifying existing meetings and processes and adding on to them, rather than creating BA-HRTC meetings; striving to meet community members "where they're at"
- Advertising through local, ethnic media outlets and on existing communication channels.

Creating a Durable Structure for Community Participation

The BA-HRTC strives to develop a foundation for changing the way in which we engage community members in economic development planning. This has not deviated from our application and our plans to maintain engagement post planning and implementation phase. Include:

- Creating online surveys that interested community members can complete (in multiple languages)
- Hosting community input and listening sessions throughout the region
- Drafting and distributing regular progress reports highlighting what the BA-HRTC has accomplished and next steps (via website, email, social media), including reporting out on the agreed upon planning metrics.

Collective Partnerships

Similar to the partnership agreement letter, the BA-HRTC has established an online form for groups and individuals interested in becoming a signatory to the BA-HRTC. The form asks individuals to commit to the goals and principles of the BA-HRTC which are to create a more inclusive, equitable, resilient, and competitive regional economy and agree to work in partnership with a wide range of regional stakeholders to achieve the goals proposed to the State by the BA-HRTC and vision of CERF within the Bay Area. To date, 70+ organizations are signatories, and BA-HRTC will continue to use this tool as a way to maintain communication and engagement with groups.

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Strategies to keep the HRTC growing and active in the planning phase:

- Regularly communicate with the larger group of signatories through our email updates and invitations to monthly stakeholder meetings
- Encourage partnerships to share the BA-HRTC work with their network
- Conduct presentations with different groups across the region and align groups with similar goals and objectives
- Apply inclusive practices by committing to making intentional connections between groups

Edits from Original Application

As the BA-HRTC learns, develops new partnerships and begins collaboration with many stakeholders, there are some minor changes made from the original application. Thus far, these include:

- Moving from designating two Steering Committee Co-Chairs to three given the size of the group and capacity of members to fully participate at all levels.
- Shifting from five proposed sub-regional groups to six groups to allow for more local planning while still meeting regional objectives.
- Clarifying the two Sub-Regional Table Co-Conveners are local Labor Councils and Community-Based Organizations, and ensuring representation of Fiscal Agent Workforce Development Board partners at each Sub-Regional Table. The two Co-conveners will have shared leadership of the Sub-Regional Tables.

Metrics of Success

Goal	How will we measure this
<p>Create a governance structure that is representative of and accountable to all stakeholders and disinvested communities.</p>	<ul style="list-style-type: none"> Steering Committee represents a variety of sectors and geographic regions, including disinvested communities and ensures continuous representation by assigning alternates for steering committee members in case members are not able to commit to all activities. Steering Committee Co-Chairs represent disinvested communities (e.g., Black, Indigenous and People of Color communities (BIPOC), immigrants, and workers) and lead work. Research, Planning, and Community Engagement Committee is responsive and accountable to regional stakeholders and upholds ethical practices in the creation and dissemination of research. Sub-Regional Tables established with clear representation from disinvested communities.
<p>Ensure that participation and decision making by disinvested communities is built</p>	<ul style="list-style-type: none"> Clear decision-making process at the Steering Committee, Sub-Regional Tables, and all levels. Clear communication channels established and accessible.
<p>Ensure that planning resources are allocated equitably across the subregions of the Bay Area.</p>	<ul style="list-style-type: none"> Budget line items reflect Sub-Regional Table needs, outreach, community engagement, removing barriers to participation, and creating space for ongoing participation. Sub-Regional Table Budget includes justification for more or less than the average allocation (e.g., \$100,000) for a Sub-Regional Table.
<p>Create multiple accessible opportunities for the general public to learn about and participate in the CERF process, including in-person and virtual events and surveys.</p>	<ul style="list-style-type: none"> Monthly stakeholder meetings that provide updates, space for feedback, and opportunities for collaboration. Create engagement plans for the post planning phase including focus groups, surveys, etc.
<p>BA-HRTC centers climate resilience, carbon emissions reduction, creation of quality high-road jobs, and expanding access to quality jobs.</p>	<ul style="list-style-type: none"> Ensure that investment recommendations coming out of the planning phase include measurable, actionable goals and strategies related to climate resilience, carbon emissions reduction, creation of quality high-road jobs and expanding access to quality jobs.
<p>Create opportunities for stakeholders to get engaged at the Sub-Regional level</p>	<ul style="list-style-type: none"> Each of the six Sub-Regional Tables will host at least 6-10 meetings for community members and stakeholders to attend and get involved in the process of developing project proposals. All meetings will be shared and advertised to increase participation. There will also be targeted outreach to engage more members and increase overall HRTC engagement to 100+ groups and individuals
<p>Propose economic development projects that are co-developed with communities</p>	<ul style="list-style-type: none"> Using the Regional Summary as a guide to identify certain economic development indicators, at least 3 pilot project proposals will be developed with potential regional impact that are aligned with the Bay Area HRTC goals.

Budget and Project Management Plan

Expense Item	Purpose	Total
Fiscal Agent Salaries and Fringe	Fiscal staff to administer grants, contracts, and provide technical assistance	357,666
Regional Convener	Support to Bay Area High Road Transition Collaborative to convene Steering Committee, Sub-Regional Tables, and project manage work.	1,212,400
Research	Consultants /TA for research planning	500,000
Data, Planning, Communications	Contracts with consultants / TA for comms. support includes: website development, web-based comms, software for gathering community input etc.	100,000
Community engagement	Subgrants for capacity building and co-convening, community outreach, translation, outreach materials, CBO capacity building, and framework on community-driven climate resilience planning.	2,465,000
Participant compensation	Includes stipends, food for in-person meetings, and childcare	304,934

ACTIVITY	SCOPE and DETAILS	TIMELINE					
		Q1	Q2	Q3	Q4	Q5	Q6
Project staffing and structure	Regional convener staff, fiscal lead staff, any additional convening consultants needed						
HRTC Governance Structure							
Steering Committee	Establish representative stakeholders from various sectors						
	Develop and approve bylaws for Steering Committee member participation						

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ACTIVITY	SCOPE and DETAILS	TIMELINE					
		Q1	Q2	Q3	Q4	Q5	Q6
Research Planning and Community Engagement Committee	Identify research team to lead Regional Summary Part 1 and establish full committee						
Sub-Regional Tables	Establish geographic groups and two co-conveners for each Sub-Regional Table						
	Identify processes, meeting cadence, structure for organization and seats to fill in each Sub-Regional Table (co-conveners and SC support)						
	Develop contracts for funding with all Sub-Regional Tables						
Outreach and Community Engagement							
Sub-Regional Tables	Brainstorm and identify stakeholders for each Sub-Regional Table						
	Develop any communication materials and outreach processes						
	Launch Sub-Regional Tables and maintain consistent outreach and engagement						
Stakeholder groups to engage	Apply targeted practices to engage with groups and sectors not already involved						
Monthly stakeholder meetings	Hold monthly meetings with updates, opportunities for collaboration and overall engagement						
Establish Steering Committee working group	Lead all processes to developing robust engagement plan, identify any frameworks and models						
Ongoing engagement through strategies	Removing barriers to participate, establishing support and capacity needs, surveys, focus groups etc. as needed						
Collective Partnership							
Circulate signatory form to a larger network	Increase the HRTC for engagement at a general, in depth and light touch engagement						
Create robust communications plan	Strategy for engagement during planning phase and post						

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Implement communication strategies	This includes any surveys, community meetings, regional meetings, quarterly newsletters etc.						
Regional Plan Part 1							
Establish contract with stakeholder to lead the regional summary part 1	Identify stakeholder, review proposed research plan and begin research plan						
Begin research and analysis	Research lead establish research team for all elements of the Part 1 plan						
Engage with stakeholders as needed	Meet with Steering Committee members, Sub-Regional Table co-conveners and additional stakeholders identified						
Data gathering and analysis							
Regional Plan Phase 1 due							
Regional Plan Part 2							
Engage with stakeholders as needed	Meet with Steering Committee members, Sub-Regional Table co-conveners and additional stakeholders identified						
Data gathering and analysis							
Regional Plan Phase 2 due							