



LOCAL GOVERNMENT  
**SUSTAINABLE**  
ENERGY COALITION

# 2021-2023 Strategic Plan

October 2021

# Introduction

**The Local Government Sustainable Energy Coalition (LGSEC)** is a statewide membership network representing local government interests related to clean energy and climate resilience at the state regulatory level. LGSEC was founded in 2007 to ensure local government needs and issues were considered and addressed in legislation and in regulatory proceedings. Deeply connect to their agency's and community's energy portfolio and resiliency initiatives, LGSEC members serve as administrators, designers, and lead implementers of a host of energy efficiency, demand response, building decarbonization, transportation electrification, and other energy management programs. As the only organization who represents local governments' energy and climate regulatory interests before the California Public Utilities Commission (CPUC), California Energy Commission (CEC), and California Air Resources Board (CARB), LGSEC is a critical partner to help jurisdictions navigate the complexity of the energy industry. *LGSEC is a coalition program of the Local Government Commission (LGC).*

LGSEC has four primary focus areas:

## Shape the Regulatory Agenda

Amplify the voice of local governments in regulatory proceedings and demonstrate the essential role that local agencies play in climate program implementation and administration.

## Connect Local Energy Leaders

Provide networking and learning opportunities for our members through a member-exclusive portal, quarterly workshops, webinars, and bi-weekly newsletters.

## Catalyze Innovation

Develop local government programs including Community Choice Aggregation, Local Government Partnerships, and Regional Energy Networks.

## Develop Long-term Strategies

Streamline collaboration on innovative policies and strategies to help California's local governments meet their energy and climate goals.





LGSEC is at an inflection point in its organizational growth with new opportunities and challenges influencing its future. Local governments, along with RENs and CCAs, are increasingly important players in the energy sector. However, jurisdictions are still looking for the right balance of serving constituents, meeting regulatory mandates, and fighting climate change. The new federal focus and funding on clean energy, the drive for electrification, more intense climate action planning, and more aggressive carbon neutrality goals are all important activities that make LGSEC's work essential. At the same time, LGSEC does not have as high of a profile as it could, with limited brand awareness, and is not yet a standard membership organization for jurisdictions.

This 2-year strategic plan is a concise, action-oriented tool to assist the Board of Directors, staff, and members to effectively manage and optimize the benefits of these changes. The plan focuses on five main themes to move the organization decisively forward:

- ▶ **1. Enhance its regulatory capabilities and effectiveness.**
- ▶ **2. Solidify the organization's capacity and ability to manage change.**
- ▶ **3. Build the membership to be more inclusive and comprehensive.**
- ▶ **4. Foster partnerships to expand its reach.**
- ▶ **5. Build stronger funding to support the organization's mission.**

In addition, LGSEC is dedicated to embracing and integrating equity into all of its work. In 2020, LGSEC adopted an equity statement and this Strategic Plan provides a means to clearly identify actions to move the equity commitment forward. As part of this process, LGSEC has defined what equity means for its work as reflected below.

## Equity Definition

For LGSEC, 'Equity' means intentionally and proactively supporting policy and local governments who are underserved and underrepresented, based on access and availability to energy information and resources, and regulatory engagement.

# Strategic Framework

## Mission

LGSEC advances local government leadership on clean energy and climate resilience through regulatory action, policies, and programs.

## Vision

LGSEC is recognized as the go-to resource to support and drive initiatives in energy resilience for local governments.

**Goal 1: Regulatory**  
Broaden and enhance the organization's regulatory presence.

**Objective:** Expand regulatory capacity and value to effectively advocate for a diverse range of local government needs by pursuing collaborative development of regulatory positions and filings, and establishing an inclusive policy platform.

**Goal 2: Organization**  
Improve organizational efficiency, capacity, and effectiveness.

**Objective:** Empower program staff to manage the organization by creating equitable processes and establishing clear roles and responsibilities between program staff, Board members, and regulatory consultant.

**Goal 3: Membership**  
Increase the number and engagement of LGSEC members.

**Objective:** Increase the value and strength of the organization's advocacy work by improving membership engagement, diversifying membership tiers, and targeting recruitment to fill representation gaps of hard-to-reach communities, tribal governments, community based organizations (CBOs), and environmental justice groups.

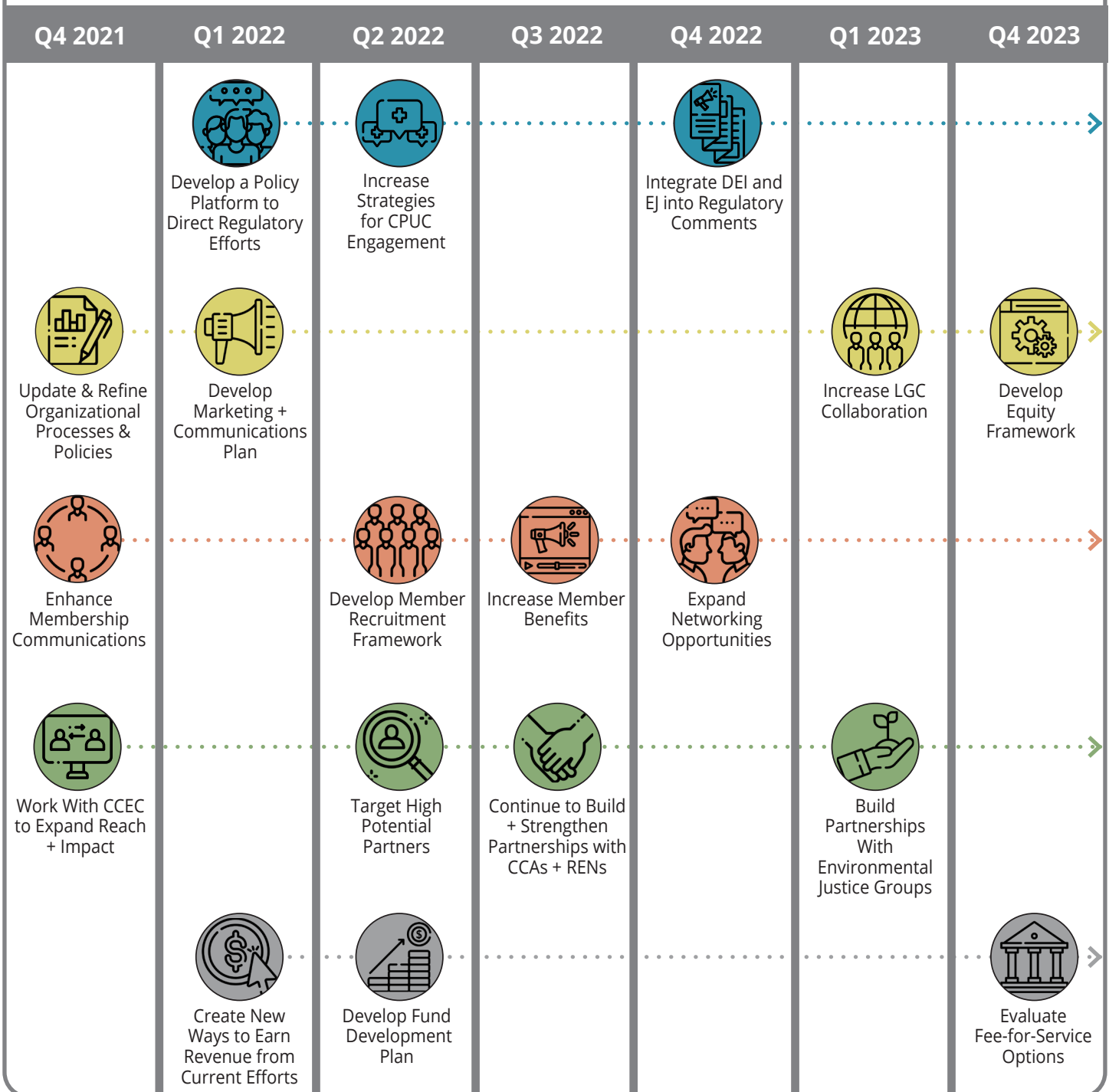
**Goal 4: Partnerships**  
Grow and foster partnerships with other local government membership groups.

**Objective:** Amplify local government voices and increase efficiencies by partnering with groups that have similar goals, such as CBOs, other membership organizations, and private sector stakeholders.

**Goal 5: Funding**  
Expand and diversify the organization's funding sources.

**Objective:** Diversify fundraising activities by streamlining membership recruitment processes and establishing alternative funding streams to build more staff and regulatory consultant time. Use capacity to increase regulatory presence and support the expansion of services to underrepresented membership categories.

# Milestones Chart



# Goal 1: Regulatory

**Broaden and enhance the organization's regulatory presence.**

## Objective

Expand regulatory capacity and value to effectively advocate for a diverse range of local government needs by pursuing collaborative development of regulatory positions and filings, and establishing an inclusive policy platform.

## Strategies

- 1.1 Develop a policy platform to inform and direct regulatory efforts and expected outcomes.**
  - 1.1.1 Create a working group comprised of Board members and LGSEC members to develop policy platform.
  - 1.1.2 Within 6 months, create and update an annual policy platform with the Board and members as a means to direct staff and consultant efforts.
  - 1.1.3 Utilize the policy platform as a communication and recruitment tool by sharing priorities online, in bi-weekly newsletters, and additional materials.
- 1.2 Increase LGSEC's CPUC engagement to identify strategies beyond filing formal regulatory comments.**
  - 1.2.1 Engage in strategies such as informal conversations or ex parte meetings.
  - 1.2.2 Leverage member's relationships and work with CPUC to expand engagement.
  - 1.2.3 Create complimentary internal tracking processes.
- 1.3 Integrate Diversity, Equity, and Inclusion (DEI) and Environmental Justice (EJ) concerns into regulatory comments.**
  - 1.3.1 Establish a process to get direct engagement and input from low-income and hard-to-reach communities, tribal governments, CBOs, and EJ groups to inform regulatory action.
  - 1.3.2 Initiating regular calls with respective CBOs and tribal stakeholders to gather feedback that contributes to regulatory action.

# Goal 2: Organization

**Improve organizational efficiency, capacity, and effectiveness.**

## Objective

Empower program staff to manage the organization by creating equitable processes and establishing clear roles and responsibilities between program staff, Board members, and regulatory consultant.

## Strategies

### 2.1 Update and refine organizational processes and policies.

- 2.1.1 Ensure that organizational policies, with the support of the Board, empower staff decision making and activities. This includes setting expectations and autonomy on aspects of budgeting, partnership development, and coordination with LGC.
- 2.1.2 Clarify expectations and accountabilities for Board member roles, responsibilities, and activities. By the 2022 Board recruitment cycle, update the Board Roles and Responsibilities document.
- 2.1.3 Establish policies and procedures for the regulatory consultant to enable and streamline regulatory actions.
- 2.1.4 Revisit the Regulatory Recommendations process on an annual basis to identify efficiencies for the regulatory consultant to engage in specific proceedings on an ongoing basis without numerous approvals.
- 2.1.5 Within 6 months, create a policy to enable fee collection, including online donations, paywalls, and other means to collect fees for service.
- 2.1.6 Update the Bylaws on an ongoing basis, with the goal to incorporate changes, new programs, and initiatives established through the Strategic Planning implementation process by the end of the Strategic Plan timeline.

### 2.2 Develop a simple and easy to use Marketing and Communications Plan to promote the work and accomplishments of LGSEC to internal and external partners, regulators, and beyond.

- 2.2.1 Expand website functionality to appropriately represent LGSEC's mission, resources, benefits, and members.
- 2.2.2 Develop communication tools such as talking points, social media posts, one pagers, powerpoints, etc. to help members promote LGSEC to their networks.



## Goal 2 Strategies Continued

2.2.3 Build social media presence on LinkedIn and Twitter to promote awareness with target audiences. This includes creating a LinkedIn page for LGSEC, asking Board members and members to update profiles with LGSEC affiliation, as well as to actively promote public events, webinars, and regulatory filings.

### 2.3 Develop an Equity Framework for LGSEC to guide ongoing and future work as well as to provide as a model for members, nonprofits, coalitions, and collaboratives.

2.3.1 In the calendar year 2022, incorporate in the 2023 budget to hire a DEI consultant to develop an equity framework for LGSEC. This would include tracking the budget throughout 2022 to start saving for this expense.

2.3.2 Provide program staff and Board members with DEI training resources.

2.3.3 Build LGSEC's staff and Board knowledge and understanding of tribal government and Indigenous history, perspectives, and challenges in order to create an environment where tribal governments feel comfortable advocating their needs to the CPUC through LGSEC.

2.3.4 Publish an update to the 2020 Equity Statement with actions taken, progress made, and additional equity work completed since its publication.

### 2.4 Continue to strengthen and enhance the relationship with LGC at the Board level and increase collaboration and connections to other LGC programs (ARCCA, CCEC).

2.4.1 Proactively engage LGC and CCEC leadership to explore a more formal relationship for coordination and collaboration, to reduce duplicative efforts and mitigate brand confusion.

2.4.2 Establish quarterly meetings for the LGSEC Board and LGC Leadership to coordinate and align efforts, identify funding needs, and connect to other LGC programs.





# Goal 3: Membership

**Increase the number and engagement of LGSEC members.**

## Objective

Increase the value and strength of the organization's advocacy work by improving membership engagement, diversifying membership tiers, and targeting recruitment to fill representation gaps of hard-to-reach communities, tribal governments, CBOs, and environmental justice groups.

## Strategies

- 3.1 As part of an overall Marketing and Communications Plan (Strategy 2.2), enhance and expand membership communications to more widely share the organization's value proposition and membership benefits.**
  - 3.1.1 Identify and employ a range of communication channels and messengers to reach potential new members. This includes co-branded messaging, channel partners, social media presence, and new stakeholders from the private sector, CBOs, and tribal governments.
  - 3.1.2 Within 3 months, create and maintain a GIS map where the organization's memberships are to target gaps and opportunities to leverage current members' support.
  - 3.1.3 Develop tailored messages and benefits for each target membership audience.
- 3.2 Create a Recruitment Framework to increase the number and types of membership (Local Government, Affiliates, etc) with a goal of increased diversity of members.**
  - 3.2.1 Develop a strategic approach to member recruitment that targets organizations based on reach and impact: 1. Council of Governments (COGs), 2. Counties, 3. Cities, 4. CBOs, and 5. Tribal Governments.
  - 3.2.2 Build on best practices (CASBO model) to explore and implement alternative fee and membership options in order to offer scholarship funds and trial memberships for CBOs, EJ groups, tribal representatives, and local governments who cannot afford full priced dues.
  - 3.2.3 Engage elected officials (e.g., professional associations composed of electeds – RCRC, et. al) into the LGSEC membership and/or explore opportunities for greater collaboration.
  - 3.2.4 Seek out Metropolitan Planning Organizations (MPOs) and larger regional agencies for membership to expand the reach of LGSEC.
  - 3.2.5 Within 12 months, leverage and expand participation in the Membership Reciprocity Discount program.
  - 3.2.6 Create a schedule and conduct introductory presentations for Collaboratives, MPOs, RENs, and CCAs.

## Goal 3 Strategies Continued

- 3.3 Expand member benefits with enhanced regulatory engagement and information sharing.**
  - 3.3.1 Identify communication tools to better support and build member capacity.
  - 3.3.2 Develop resources and training tools for building RENS, participating in the process, and energy efficiency proceedings.
  - 3.3.3 Provide ongoing support for the growth and expansion of RENS and CCAs (transportation and DERs) beyond CPUC energy efficiency funding.
  - 3.3.4 Recruit additional member participation to ensure a balanced representation of LGSEC membership in existing working groups.
- 3.4 Expand networking opportunities to share knowledge and expertise through initiatives such as mentoring, matchmaking, and member and affiliate roundtables.**



# Goal 4: Partnerships

**Grow and foster partnerships with other local government membership groups.**

## Objective

Amplify local government voices and increase efficiencies by partnering with groups that have similar goals, such as CBOs, other membership organizations, and private sector stakeholders.

## Strategies

- 4.1 Identify and target engagement with the highest potential partner organizations and private-sector companies to expand revenue and opportunities.**
  - 4.1.1 Establish a Channel Partner program to reach extended networks (i.e., USDN, RCRC, CCEC, ARCCA, CEJA, etc.).
  - 4.1.2 Establish a Business Partner program to recruit relevant private-sector companies to help diversify funding and increase revenue.
  - 4.1.3 Define at the Board level the organization's needs for specific partners and why those organizations would be interested or need to partner with LGSEC.
  - 4.1.4 Strengthen the role of the Board and other LGSEC members in identifying and connecting with potential partners.
- 4.2 Build partnerships with environmental justice groups/organizations and CBOs who can support and increase ability to serve low-income, underserved, underrepresented, and hard-to-reach communities.**
- 4.3 Continue to build and strengthen partnerships with CCAs and RENs.**
  - 4.3.1 Explore opportunities to support the development or enhancement of CPUC filings, programs, and offerings by CCAs and RENs.
  - 4.3.2 Work with RENs and CCAs to coordinate regulatory filings and comments to increase impact of local governments in equitable decarbonization.
- 4.4 Work with the California Climate & Energy Collaborative (CCEC) to coordinate, leverage, and partner on statewide activities to expand reach and impact.**
  - 4.4.1 Collaborate by co-hosting events, sharing resources, best practices research, newsletters, engaging with the Statewide Best Practices Coordinator, and/or leveraging other cost sharing opportunities.



# Goal 5: Funding

**Expand and diversify the organization's funding sources.**

## Objective

Diversify fundraising activities by streamlining membership recruitment processes and establishing alternative funding streams to build more staff and regulatory consultant time. Use capacity to increase regulatory presence and support the expansion of services to underrepresented membership categories.

## Strategies

- 5.1 Create a fund development plan to guide the expansion of sources of revenue and increase overall income to the organization.**
  - 5.1.1 Using this plan as a roadmap, establish a budget and time allocation for staff to pursue and develop funding opportunities and deploy the strategic plan goals.
  - 5.1.2 Pursue and secure new funding sources aligned with the organization's mission and goals.
  - 5.1.3 Evaluate the potential for crowdsourcing campaigns.
  - 5.1.4 Establish a fund development subcommittee of the Board and members to explore philanthropic relationships.
  - 5.1.5 Evaluate partnerships with stakeholders and members to perform outreach and engagement as subcontractors on various funding opportunities.
- 5.2 Create new ways to earn revenue from current efforts.**
  - 5.2.1 Explore the potential to solicit donations on the website, email communications, and on webinar registration pages.
  - 5.2.2 Explore creation of information paywall for documents, webinars, regulatory information, white papers, and tools for non-members seeking information on specific topics.
- 5.3 Evaluate potential for fee-for-service offerings to assist local governments in areas such as providing community engagement services, etc. and to build organizational qualifications.**

# LGSEC Organization

## Contact Information

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**LOCAL GOVERNMENT  
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ENERGY COALITION**

## Members

BayREN  
UCLA Institute of the Environment &  
Sustainability  
Center for Sustainable Energy  
City and County of San Francisco  
City of Berkeley  
City of Carpinteria  
City of Chula Vista  
City of Corona  
City of Goleta  
City of Santa Barbara  
City of Santa Monica  
City of West Hollywood  
Contra Costa County  
County of Marin  
County of Los Angeles  
County of San Luis Obispo  
County of San Mateo

County of Santa Barbara  
County of Santa Clara  
County of Sonoma  
County of Ventura  
Eureka City Schools  
High Sierra Energy Foundation  
MCE Community Choice Energy  
Regional Climate Protection Authority (RCPA)  
Redwood Coast Energy Authority  
San Gabriel Valley Council of Governments  
(SGVCOG)  
San Joaquin Valley Clean Energy  
Organization (SJVCEO)  
Sonoma Water  
South Bay Cities Council of Governments  
StopWaste  
The Energy Coalition  
Western Riverside Council of Governments

# Implementation Plan Details

The following implementation plan provides the specific details on the roles, costs, and timeframe for each element of the Strategic Plan. The Implementation Plan will be regularly updated and used to managed the process.

The cost of each strategy or tactic is given a price range, depending on who they are, if external consultants need to be hired, etc. The ranges are:

- \$ =** Integrated into program staff, regulatory staff, Board, and/or LGC Leadership's existing time commitment and workflow
- \$\$ =** Requires additional program staff time; purchase of a less than \$500
- \$\$\$ =** Requires additional regulatory staff or LGC Leadership time; purchase between \$500 - \$2000
- \$\$\$\$ =** Requires extensive additional time from staff, regulatory staff, Board, and/or LGC Leadership; purchase of over \$2000





## Implementation Plan | Goal 1: Regulatory

Strategies + Tactics	Cost	Lead	Support	Deadline	Metric of Success
<b>1.1 Develop a policy platform to inform and direct regulatory efforts and expected outcomes.</b>	\$\$	Board, Executive Director	Members	Q1 2022	# of Policies Created
1.1.1 Create a working group comprised of Board members and LGSEC members to develop policy platform.	\$	Board, Members	Staff	Q1 2022	Working Group Created
1.1.2 Within 6 months, create and update an annual policy platform with Board and members as a means to direct staff and consultant efforts.	\$\$	Board	Members	Q1 2022	# Policies Created
1.1.3 Utilize the policy platform as a communication and recruitment tool by sharing priorities online, in bi-weekly newsletters, and additional materials.	\$	Staff	Board, Members	Ongoing	# Materials Created
<b>1.2 Increase LGSEC's CPUC engagement to identify strategies beyond filing formal regulatory comments.</b>	\$	Board		Q2 2022	# of meetings with CPUC
1.2.1 Engage in strategies such as informal conversations or ex parte meetings.	\$	Board	Staff	Q2 2022	# of meetings with CPUC
1.2.2 Leverage member's relationships and work with CPUC to expand engagement.	\$	Members	Staff	Ongoing	# of meetings with CPUC
1.2.3 Create complimentary internal tracking processes.	\$	Staff		Q2 2022	Tracking Process Created
<b>1.3 Integrate Diversity, Equity, and Inclusion (DEI) and Environmental Justice (EJ) concerns into regulatory comments.</b>	\$\$\$	Regulatory Consultant, Staff	Board	Ongoing	# of Stakeholders Engaged
1.3.1 Establish a process to get direct engagement and input from low-income and hard-to-reach communities, tribal governments, CBOs, and EJ groups to inform regulatory action.	\$\$\$	Staff	Board, Members	Q4 2022	Process Complete
1.3.2 Initiate regular calls with respective CBOs and tribal stakeholders to gather feedback that contributes to regulatory action.	\$\$	Staff	Board, Members	Ongoing	# of Calls Quarterly

## Implementation Plan | Goal 2: Organization

Strategies + Tactics	Cost	Lead	Support	Deadline	Metric of Success
<b>2.1 Update and refine organizational processes and policies.</b>	\$	Staff	Board	Q4 2021	# of Policies Created or Reviewed
2.1.1 Ensure that organizational policies, with the support of the Board, empower staff decision making and activities. This includes setting expectations and autonomy on aspects of budgeting, partnership development, and coordination with LGC.	\$	Board, Staff	LGC Leadership	Q4 2021	Staff Survey
2.1.2 Clarify expectations and accountabilities for Board member roles, responsibilities, and activities. By the 2022 Board recruitment cycle, update the Board Roles and Responsibilities document.	\$	Staff	Board	Q4 2021	Board Document Updated
2.1.3 Establish policies and procedures for the regulatory consultant to enable and streamline regulatory actions.	\$	Staff	Board	Q4 2021	Process Reviewed Annually
2.1.4 Revisit the Regulatory Recommendations process on an annual basis to identify efficiencies for the regulatory consultant to engage in specific proceedings on an ongoing basis without numerous approvals.	\$	Staff	Regulatory Consultant	Annual	Document Reviewed Yearly
2.1.5 Within 6 months, create a policy to enable fee collection, including online donations, paywalls, and other means to collect fees for service.	\$\$	Staff	Board	Q1 2022	% Increase in Donations
2.1.6 Update the Bylaws on an ongoing basis, with the goal to incorporate changes, new programs, and initiatives established through the Strategic Planning implementation process by the end of the Strategic Plan timeline.	\$	Staff	Board	Q4 2023	Biennial Updates to Bylaws
<b>2.2 Develop a simple and easy to use Marketing and Communications Plan to promote the work and accomplishments of LGSEC to internal and external partners, regulators, and beyond.</b>	\$\$	Staff	Board	Q1 2022	Completed Plan
2.2.1 Expand website functionality to appropriately represent LGSEC's mission, resources, benefits, and members.	\$\$	Staff		Q2 2022	Number of visitors to website
2.2.2 Develop communication tools such as talking points, social media posts, one pagers, powerpoints, etc. to help members promote LGSEC to their networks.	\$	Staff	Members	Q1 2022	# of Members who use Tools

Strategies + Tactics	Cost	Lead	Support	Deadline	Metric of Success
2.2.3 Build social media presence on LinkedIn and Twitter to promote awareness with target audiences. This includes creating a LinkedIn page for LGSEC, asking Board members and members to update profiles with LGSEC affiliation, as well as to actively promote public events, webinars, and regulatory filings.	\$	Staff	Board, Members	Q1 2022	# Followers/ Interactions Gained
<b>2.3 Develop an Equity Framework for LGSEC to guide ongoing and future work as well as to provide as a model for members, nonprofits, coalitions, and collaboratives.</b>	\$\$\$\$	DEI Consultant	Board	Q4 2023	Completion of Equity Guide
2.3.1 In the calendar year 2022, incorporate in the 2023 budget to hire a DEI consultant to develop an equity framework for LGSEC. This would include tracking the budget throughout 2022 to start saving for this expense.	\$	Staff	Board	Q4 2022	DEI Consultant Hired
2.3.2 Provide program staff and Board members with DEI training resources.	\$\$\$\$	DEI Consultant	Board	Q4 2023	# Staff + Board Trained
2.3.3 Build LGSEC's staff and Board knowledge and understanding of tribal government and Indigenous history, perspectives, and challenges in order to create an environment where tribal governments feel comfortable advocating their needs to the CPUC through LGSEC.	\$\$\$\$	DEI Consultant	Board/Staff	Q4 2023	# Staff + Board Trained
2.3.4 Publish an update to the 2020 Equity Statement with actions taken, progress made, and additional equity work completed since its publication.	\$\$\$\$	DEI Consultant	Staff	Q4 2023	Equity Statement Updated
<b>2.4 Continue to strengthen and enhance the relationship with LGC at the Board level and increase collaboration and connections to other LGC programs (ARCCA, CCEC).</b>	\$	Board		Q1 2023	# of Joint Activities
2.4.1 Proactively engage LGC and CCEC leadership to explore a more formal relationship for coordination and collaboration, to reduce duplicative efforts and mitigate brand confusion.	\$\$	Staff	Board	Q1 2023	# of Joint Activities
2.4.2 Establish quarterly meetings for the LGSEC Board and LGC Leadership to coordinate and align efforts, identify funding needs, and connect to other LGC programs.	\$\$\$	Board, LGC Leadership	Staff	Q4 2023	Meeting Held Quarterly



## Implementation Plan | Goal 3: Membership

Strategies + Tactics	Cost	Lead	Support	Deadline	Metric of Success
<b>3.1 As part of an overall Marketing and Communications Plan (Strategy 2.2), enhance and expand membership communications to more widely share the organization's value proposition and membership benefits.</b>	\$\$	Staff		Q2 2022	% Increase in Membership
3.1.1 Identify and employ a range of communication channels and messengers to reach potential new members. This includes co-branded messaging, channel partners, social media presence, and new stakeholders from the private sector, CBOs, and tribal governments.	\$\$	Staff	Board, Members	Q2 2022	Increase in Communication Channels
3.1.2 Within 3 months, create and maintain a GIS map where the organization's memberships are to target gaps and opportunities to leverage current members' support.	\$\$	Staff		Q4 2021	GIS Map Created
3.1.3 Develop tailored messages and benefits for each target membership audience.	\$	Staff		Q4 2021	Messaging Created
<b>3.2 Create a Recruitment Framework to increase the number and types of membership (Local Government, Affiliates, etc) with a goal of increased diversity of members.</b>	\$\$	Staff, Board	Members	Q2 2022	% Increase in Membership, # New Membership Categories
3.2.1 Develop a strategic approach to member recruitment that targets organizations based on reach and impact: 1. Council of Governments (COGs), 2. Counties, 3. Cities, 4. CBOs, 5. Tribal Governments.	\$\$	Board	Members, Staff	Q2 2022	# of new Memberships
3.2.2 Build on best practices (CASBO model) to explore and implement alternative fee and membership options in order to offer scholarship funds and trial memberships for CBOs, EJ groups, tribal representatives, and local governments who cannot afford full priced dues.	\$\$	Board	Staff	Q3 2022	Topic Presented to Board
3.2.3 Engage elected officials (e.g., professional associations composed of electeds – RCRC, et. al) into the LGSEC membership and/or explore opportunities for greater collaboration.	\$\$	Board	Members	Q2 2022	# of Interactions with Elected Officials
3.2.4 Seek out Metropolitan Planning Organizations (MPOs) and larger regional agencies for membership to expand the reach of LGSEC.	\$\$	Board	Members	Q2 2022	# of Regional Org Membership

Strategies + Tactics	Cost	Lead	Support	Deadline	Metric of Success
3.2.5 Within 12 months, leverage and expand participation in the Membership Reciprocity Discount program.	\$\$	Board		Q3 2022	% Increase in MRD Program
3.2.6 Create a schedule and conduct introductory presentations for Collaboratives, MPOs, RENs, and CCAs.	\$\$	Board, Staff		Q4 2023	# Presentations Conducted
<b>3.3 Expand member benefits with enhanced regulatory engagement and information sharing.</b>	\$\$	Regulatory Consultant	Staff	Q3 2022	# of new Members
3.3.1 Identify communication tools to better support and build member capacity.	\$	Staff	Members	Q1 2022	#Tools Created
3.3.2 Develop resources and training tools for building RENs, participating in the process, and energy efficiency proceedings.	\$\$\$	Staff	Board	Q3 2022	# Resources Developed
3.3.3 Provide ongoing support for the growth and expansion of RENs and CCAs (transportation and DERs) beyond CPUC energy efficiency funding.	\$\$	Board	Staff	Q1 2022	# RENs, CCAs Engaged With
3.3.4 Recruit additional member participation to ensure a balanced representation of LGSEC membership in existing working groups.	\$	Board	Staff	Q1 2022	% Increase in Working Group Members
<b>3.4 Expand networking opportunities to share knowledge and expertise through initiatives such as mentoring, matchmaking, and member and affiliate roundtables.</b>	\$\$	Board	Staff, Members	Q4 2022	# of Networking Events

## Implementation Plan | Goal 4: Partnerships

Strategies + Tactics	Cost	Lead	Support	Deadline	Metric of Success
<b>4.1 Identify and target engagement with the highest potential partner organizations and private-sector companies to expand revenue and opportunities.</b>	\$\$	Staff	Board, Members	Q2 2022	Increase in Revenue
4.1.1 Establish a Channel Partner program to reach extended networks (i.e., USDN, RCRC, CCEC, ARCCA, CEJA, etc.).	\$	Staff	Board	Q2 2022	# of Partners
4.1.2 Establish a Business Partner program to recruit relevant private-sector companies to help diversify funding and increase revenue.	\$\$	Board	Staff	Q2 2022	Increase in Revenue
4.1.3 Define at the Board level the organization's needs for specific partners and why those organizations would be interested or need to partner with LGSEC.	\$\$	Board		Q4 2021	# Organizations Identified
4.1.4 Strengthen the role of the Board and other LGSEC members in identifying and connecting with potential partners.	\$	Board	Members	Q1 2022	# Connections with Potential Partners
<b>4.2 Build partnerships with environmental justice groups/organizations and CBOs who can support and increase ability to serve low-income, underserved, underrepresented, and hard-to-reach communities.</b>	\$\$	Staff		Q1 2023	# CBOs Partnered With
<b>4.3 Continue to build and strengthen partnerships with CCAs and RENs.</b>	\$	Board	Staff	Q3 2022	# of CCAs Engaged
4.3.1 Explore opportunities to support the development or enhancement of CPUC filings, programs and offerings by CCAs and RENs.	\$\$\$	Regulatory Consultant		Q1 2022	# Programs Developed or Explored
4.3.2 Work with RENs and CCAs to coordinate regulatory filings and comments to increase impact of local governments in equitable decarbonization.	\$\$\$	Regulatory Consultant		Q3 2022	# Coordinated Filings + Comments
<b>4.4 Work with CCEC to coordinate, leverage, and partner on statewide activities to expand reach and impact.</b>	\$\$	Staff	Board	Q4 2021	# of Shared Initiatives
4.4.1 Collaborate by co-hosting events, sharing resources, best practices research, newsletters, engaging with the Statewide Best Practices Coordinator, and/or leveraging other cost sharing opportunities.	\$\$	Staff	Board	Q4 2021	# Shared Initiatives



## Implementation Plan | Goal 5: Funding

Strategies + Tactics	Cost	Lead	Support	Deadline	Metric of Success
<b>5.1 Create a fund development plan to guide the expansion of sources of revenue and increase overall income to the organization.</b>	\$\$	Staff	Board	Q2 2022	Plan Developed
5.1.1 Using this plan as a roadmap, establish a budget and time allocation for staff to pursue and develop funding opportunities and deploy the strategic plan goals.	\$\$	Staff	Board	Q3 2022	Staff Goals Outlined
5.1.2 Pursue and secure new funding sources aligned with the organization's mission and goals.	\$\$	Board		Q1 2023	Increase in Funding
5.1.3 Evaluate the potential for crowdsourcing campaigns.	\$	Staff		Q1 2022	New Funding Sources Researched
5.1.4 Establish a fund development subcommittee of the Board to explore philanthropic relationships.	\$	Board	Members	Q1 2022	Sub-committee Established
5.1.5 Evaluate partnerships with stakeholders and members to perform outreach and engagement as subcontractors on various funding opportunities.	\$\$	Board		Q3 2022	Increase in Outreach
<b>5.2 Create new ways to earn revenue from current efforts.</b>	\$\$	Staff	Board, Members	Q1 2022	Increase in Funding
5.2.1 Explore the potential to solicit donations on the website, email communications, and on webinar registration pages.	\$\$	Staff	Board	Q1 2022	Increase in Funding
5.2.2 Explore creation of information paywall for documents, webinars, regulatory information, white papers, and tools for non-members seeking information on specific topics.	\$	Staff	Board	Q1 2022	Increase in Funding
<b>5.3 Evaluate potential for fee-for-service offerings to assist local governments in areas such as providing community engagement services, etc. and to build organizational qualifications.</b>	\$\$	Staff	Board	Q4 2023	# Offerings