



Local Governments Empowering Our Communities

2025 Strategic Plan

October 2021



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About BayREN

The Bay Area Regional Energy Network (BayREN) is a collaboration of the nine counties that make up the San Francisco Bay Area. BayREN provides regional-scale energy efficiency programs, services, and resources. BayREN is funded by utility ratepayer funds through the CPUC, as well as other sources, drawing on the expertise, knowledge, and proven track record of Bay Area local governments. BayREN is a highly effective and trusted group of local governments that deliver targeted, integrated, and regional-scale climate solutions, focused on energy, water, and resilience.

As illustrated in the adjacent graphic, BayREN provides three main areas of expertise and services:

1. **Promoting Healthy and Energy Efficient Buildings** for single family and multifamily residents and for small- medium commercial property owners;
2. **Building Capacity** for local governments to increase their impact with training, mentoring, and a range of resources throughout the nine Bay Area counties;
3. **Reducing Carbon Emissions** by catalyzing regional activities and connecting them to existing initiatives.

New initiatives and programs in the next 1-3 years include:

- Improve housing affordability by focusing on middle income, hard-to-reach markets and reducing carrying/operating costs for homeowners and renters
- Expand services and support to small/medium commercial business owners, including non-English speaking and other undeserved audiences
- Offer more resources and programs for the public sector workforce to support local climate action



- Empower and enhance the capacity of local governments to advance climate and energy goals
- Create regional resources and tools that can directly impact and support local needs, including meeting greenhouse gas (GHG) targets in Climate Action Plans
- Tailor programs to support resilience and seismic retrofits as well as improve health
- Expand workforce development and support with a focus on young adults from equity priority communities.

Overview of BayREN Program Offerings

Single Family Homeowners

BayREN's Home+ program helps single family homeowners save energy, increase the comfort and safety of their home, and receive rebates. A Home Energy Advisor works with homeowners to prioritize cost-effective improvements and provides rebates for installing energy efficient upgrades in their home. The Green Labeling program helps promote the resale of more efficient, comfortable, and healthier homes by assessing a home's envelope and major energy systems.

Multifamily

BayREN offers a multifamily building financing and upgrade program assisting building owners in improving their properties, with the priority being affordable properties. Multifamily property owners receive a free energy audit and are eligible for rebates for energy upgrades to their buildings. The program provides technical assistance with planning and financing energy and water saving improvements. This program focuses on renters and middle income families, and improving housing affordability.

Codes & Standards

BayREN assists local governments to evaluate and improve compliance with the Energy Code and to develop options for accelerating energy efficiency. This includes providing no-cost training to building departments, funding demonstration projects, hosting quarterly regional innovation forums, and assisting Bay Area communities in developing reach codes.

Commercial

BayREN has two programs designed to work with the schedule, budget, and needs of small and medium businesses. First, the BayREN Pay-for-Performance Program offers rebates, technical assistance, and other financial resources to reduce utility costs and improve the quality of buildings and businesses. Second, the BayREN Microloan Program offers interest-free loans to help make energy efficiency upgrades more affordable. The commercial program also works to support small businesses with COVID-19 related enhancements, marketing, and community outreach support. These BayREN programs target small, non-English speaking businesses in Equity Priority Communities.

Water Bill Savings

Water Upgrades \$ave is an innovative on-bill financing program for home improvements related to conservation and energy efficiency for municipal water utilities and their customers. Select municipal water utility customers can install water conservation improvements with no up-front cost — using an on-bill charge that is significantly lower than the estimated savings. Local governments provide residents and businesses an enhanced and inclusive pathway to meet code requirements and reduce their utility bills.

Strategic Plan Purpose & Process

The BayREN 2025 Strategic Plan provides a path forward for the organization over the next 5 years with a focus on building a robust foundation for growth and innovation. This Strategic Plan explores how the organization and its resources, services, and programs will meet future needs for the nine Bay Area counties and BayREN members. The Strategic Plan is an action-oriented plan with clear metrics, actions, and steps to achieve the organization's objectives, including a framework for programs to evolve to meet bigger goals related to equity and market transformation. This planning process has occurred alongside the development of the BayREN Business Plan, allowing the organization to take a holistic view of where it will be in 5 years and how it will meet those goals.

Process

The strategic planning process took place from February to September 2021 and was led by a Strategic Planning Committee. This Committee was comprised of BayREN Program and County leads, BayREN leadership, and facilitated by BluePoint Planning. This group began the process by evaluating BayREN's strengths, weaknesses, and opportunities and discussing its role in the region. The next step was to develop a five year Strategic Framework with a new vision and goals. After developing the Strategic Framework, the Committee worked on creating strategies and tactics to achieve the identified goals, as well as prioritizing the strategies. Concurrently, an Equity Framework and Equity Discussion Guide were developed to support the organization's focus on equity. These tools helped frame all of the strategies, goals, and tactics with equity in mind. In addition to the Committee meetings, progress and drafts were shared with the Coordinating Committee at three meetings.



Embedding Equity into BayREN

The BayREN Equity Framework was established as a tactical guide to develop, embed, and measure the organization's equity goals based on the organization's equity readiness and ability to impact core issues. Specifically, the framework articulates what equity means in the context of the organization's every day work and sets clear targets across a variety of desired equity outcomes.

The Equity Framework should be used in concert with the goals of the strategic plan to ensure there is a deliberate alignment between the direction BayREN is moving in and the desired equity outcomes it is seeking to achieve.

The Equity Framework is composed of four main elements:

- **An organizational equity definition**
- **Guiding equity principles**
- **Operational levers**
- **Phased equity measures of success**

To complement this Framework, an Equity Discussion Guide was created to operationalize equity in BayREN programs.

Summaries of these components follow.

Guiding Equity Principles

These three principles guide BayREN's approach to equity and guided the development of the 2025 Strategic Plan:

Targeted Impact: Accountability and emphasis on the needs of equity priority communities

Collective Action: Work in partnership, fill gaps, and influence where real impact can be made

Guided by Clear Outcomes: Honor service to priority communities by identifying realistic opportunities

Levers

Levers are the operational areas for BayREN to embed equity into its work and seek to move the organization toward clear outcomes both internally and externally. The levers are:

People: Staff, Coordinating Circle, Members, Partners, Consultants

Processes: Including but not limited to the organization's decision making, governance, engagement, and evaluation

Programs: Including the design, implementation, and budgeting

Policies: Contracting, hiring, human resources, marketing, etc.

Equity Framework

BayREN Equity Definition

For BayREN, equity means addressing systemic barriers to energy efficiency and electrification, especially for, and in collaboration with, equity priority communities and those who disproportionately face energy burdens, climate impacts, and are underrepresented in policy and decision-making.

Equity Measures of Success

Central to this effort, is the understanding that achieving equity is not a simple task to be completed at a specific point in time, but a long-term process requiring the organization to practice and continually improve. The measures of success guides the organization to describe and track clear desired outcomes for each of the four levers and across four stages of equity impact. The four stages help to focus the organization on what can be achieved and prioritized now, as well as the future conditions it seeks to achieve. For BayREN this provides a spectrum of change that will be proactively pursued over time.

Current Areas for Focus	Future Focus
<p>ASSESSMENT AND PROACTIVE AWARENESS</p> <ul style="list-style-type: none">• Invest in team/department growth• Focus on naming challenges & opportunities• Invest in research, relationships, and outlining the “baseline”	<p>INCLUSIVE ACCESS</p> <ul style="list-style-type: none">• Invest in organizational change• Focus on participation, building trust & relationships, and developing shared understandings with partners and community <p>CULTURE SHIFT</p> <ul style="list-style-type: none">• Invest in regional efforts (programmatic/institutional)• Seek to restructure and shift the organization toward prioritizing communities as documented practice in key operations and public work <p>POWER SHIFT</p> <ul style="list-style-type: none">• Invest in regional change (structural)• Shift systemic and regional practice and set the organization up to maintain its long-term internal changes and public impacts

Equity Considerations

Target Audiences

The BayREN target equity audiences are determined by MTC and the CPUC Environmental Social Justice (ESJ) Action Plan. The term “equity priority communities” is the preferred term for the targeted audiences and includes audiences identified by MTC as well as those included in the CPUC’s ESJ Plan. These two groups are complementary with the CPUC definition offering a broader energy-oriented.

CPUC’s Environmental and Social Justice Communities include:

- Predominantly communities of color or low-income
- Underrepresented in the policy setting or decision-making process
- Subject to a disproportionate impact from one or more environmental hazards
- Likely to experience disparate implementation of environmental regulations and socioeconomic investments in their communities

On the ground this includes, but is not limited to:

- People of color
- Low-income populations
- People with limited English proficiency
- Rent-burdened households
- People with disabilities

MTC Equity Priority Communities

Demographic Factor	Mean of Tract-Level Shares	Standard Deviation (SD)	.5 SD PBA2050 Threshold (High EPC)	1 SD (Higher EPC)	1.5 SD (Highest EPC)
People of Color	58%	24%	70%	82%	94%
Low-Income (<200% Federal Poverty Level-FPL)	21%	14%	28%	35%	42%
Limited English Proficiency	8%	8%	12%	16%	20%
Zero-Vehicle Household	9%	12%	15%	21%	27%
Seniors 75 Years and Over	6%	5%	8%	11%	14%
People with Disability	10%	5%	12%	15%	18%
Single Parent Families	13%	9%	18%	22%	26%
Rent-Burdened	10%	8%	14%	18%	22%

Equity Discussion Guide

The Equity Discussion Guide is designed around a set of questions for six equity consideration areas. The guide can be used and enhanced by program leads and BayREN staff as they develop programs and build a greater based on knowledge about what is successful in achieving equity goals.

The following equity considerations are the foundation for any BayREN equity-centered program. Additional considerations can and should be added as data and experience informs program design. The considerations are described below:

1. **Accessibility:** Removes systemic barriers to program offerings through intentional, relevant, and inclusive program design and outreach.
2. **Accountability:** A system put in place that allows equity priority communities, local government staff, and others to ensure equity work is being monitored and propelled forward.

3. **Affordability:** The extent to which a program service is accessible given its cost and the amount that a customer can pay.
4. **Just Transition:** The shift from an extractive economy to a regenerative economy that helps workers transition to a clean energy economy with high roads jobs - that is, jobs that lift up workers, use natural resources and human capital more efficiently, and foster equity, justice, and democracy for all people.
5. **Community Vibrance:** Aspects of the community that make it connected, resilient, healthy, and inspiring. Community vibrance can position a jurisdiction to thrive.
6. **Health:** A state of good physical, mental, and social well-being and not merely the absence of disease or infirmity.



2025 Strategic Plan Framework

BayREN Mission

BayREN is a local government coalition of the nine Bay Area counties supporting communities to equitably achieve California's climate and energy goals.

2025 Vision

By 2025, BayREN's organization, resources and programs will evolve to more intentionally integrate equity, while filling gaps and addressing barriers to energy efficiency and electrification, as an essential part of meeting State climate and energy goals.

Goals

GOAL 1: RESPONSIVE ORGANIZATION

Transform BayREN into a more responsive organization that embraces equity, is open to varied perspectives, and continually evaluates and improves upon itself to fulfill our potential.

GOAL 2: ADDRESS PROGRAMMATIC INEQUITIES AND BARRIERS

Evolve BayREN's programs to address programmatic inequities and barriers to energy services in order to create opportunities, remove barriers, and fill policy gaps to transform the market and serve targeted audiences.

GOAL 3: COUNTY RESOURCES AND SUPPORT

Provide resources for county representatives to fully support BayREN programs that align with local jurisdictions' priorities and goals.

GOAL 4: LEVERAGE REGIONAL SCALE

Leverage BayREN's regional reach and partnerships to establish streamlined scalable and innovative solutions to influence market demand, policy and decision making to meet climate action goals.

Goal 1: Responsive Organization

Transform BayREN into a more responsive organization that embraces equity, is open to varied perspectives, and continually evaluates and improves upon itself to fulfill our potential.

Objective: Ensure that BayREN can meet its potential through proactively capturing opportunities and supporting innovation.

Strategies

- 1.1 Develop the procedures and policies to systematically diversify the BayREN organization where possible.
 - 1.1.1 Adjust procurement process and policies to attract, hire, and retain consultants that are representative of the Bay Area population.
 - 1.1.2 Build and maintain partnerships with organizations and individuals representing diverse backgrounds and life experiences to inform BayREN's equity goals.
 - 1.1.3 Support county members efforts in diversification by sharing information, training opportunities, and best practices.
 - 1.1.4 Establish standard language for contracting to support increased diversity using best practices.
- 1.2 Establish an ongoing process to better understand and respond to partners and stakeholder needs and to fill service gaps.
 - 1.2.1 Foster meaningful relationships, trust, and collaboration with county leaders and representatives.
 - 1.2.2 Maintain ongoing dialogues and coordination with other program administrators including PG&E and CCAs.
 - 1.2.3 Identify and reach out to decision-makers, community partners, and other stakeholders to gather feedback and information about their needs.
- 1.3 Evaluate and refine the BayREN decision-making and governance process to improve its ability to respond quickly to and solve problems, innovate, and take advantage of opportunities.
 - 1.3.1 Assess the effectiveness of the holacracy model to meet the growing and changing needs of BayREN.
 - 1.3.2 Identify alternatives and opportunities to evolve the governance model, as necessary.
 - 1.3.3 Engage the Coordinating Circle in evaluating and discussing how BayREN can be more responsive and effective as an organization.
- 1.4 Identify and develop specific initiatives and opportunities focused on equity and organizational diversity within and beyond energy efficiency.
 - 1.4.1 Incorporate equity discussions as a regular element of the Coordinating Circle Agenda and other organizational coordination efforts.
 - 1.4.2 Explore funding opportunities and grants that can support equity engagement, research, and program development.
 - 1.4.3 Determine at least one equity initiative annually for the organization to pursue to meet equity goals.

Goal 1: Responsive Organization

Success Factors

- Measured progress in the diversity of consultants
- Increased number of partnerships with community organizations representing diverse populations, other relevant public and private sector stakeholders
- Identification and implementation of non-CPUC funded programs and initiatives
- Measured increase in funding focused on equity and energy efficiency
- Infrastructure established for equity priority community stakeholders to advise on and participate in budget and program decisions and initiatives



Goal 2: Address Programmatic Inequities + Barriers

Evolve BayREN's programs to address programmatic inequities and barriers to energy services in order to create opportunities, remove barriers, and fill policy gaps to transform the market and serve targeted audiences.

Objective: Increase the ability of BayREN's programs to meet equity goals and to be as effective and relevant as possible.

Strategies

- 2.1 Establish a long-term approach to incorporating equity into programs and services.
 - 2.1.1 Identify opportunities using the Equity Discussion Guide to determine how, where, and what programs should be refined to meet its equity goals in 2024-2031 Business Plan.
 - 2.1.2 Evaluate changes to new or existing program models that go beyond traditional rebate and incentive structures.
- 2.2 Ensure programs are relevant to target audiences, effective, and meet BayREN's goals and objectives.
 - 2.2.1 Establish a robust and regular program review feedback process for program leads to evaluate that programs are meeting the intended objectives and metrics, and pivot to new models if needed.
 - 2.2.2 Assess what metrics, if any, are needed beyond CPUC requirements, to track and evaluate program performance.
 - 2.2.3 Ensure program accountability by designing and implementing a data capture process to track metrics against clear goals developed by each program, and regularly report to the Coordinating Circle, counties, and stakeholders.

- 2.2.4 Host annual, at a minimum, discussions with the Coordinating Circle to capture and identify potential new programs or updated innovative program elements.
- 2.3 Create an ongoing process and funding mechanism to develop relationships and build trust with community-based organizations (CBOs), community leadership organizations, and the regional community.
 - 2.3.1 Actively engage and learn how to better understand, integrate, and serve equity priority community needs.
 - 2.3.2 When appropriate, contract with community-based organizations to carry out implementation and outreach activities in order to better help BayREN reach target audiences.

Goal 2: Address Programmatic Inequities + Barriers

Success Factors

- Effective process to co-create and continually improve programs in collaboration with community-based organizations, including allocated funding to CBOs for involvement
- Utilization of the Equity Discussion Guide
- Number and increase of programs in the equity segment
- Funds invested in equity priority communities
- Number of small/medium Businesses served
- Number of middle-income residents participating in programs
- Number and diversity of contractors participating
- Number of small and under-resourced jurisdictions able to access Codes & Standards services

Note that additional metrics will be established by the CPUC and the CAEECC Equity Working Group which may replace some or all of these.



Goal 3: Activate + Empower Counties

Provide resources for county representatives to fully support BayREN programs that align with local jurisdictions' priorities and goals.

Objective: Optimize the engagement of the counties to help BayREN better utilize funding and meet its potential.

Strategies

- 3.1 Work with counties on an annual basis to ensure clarity of local goals, alignment with BayREN programs, and active engagement in program promotion.
 - 3.1.1 Conduct annual coordination meetings with each county representative and county staff to set and define goals.
 - 3.1.2 Encourage program leads and county leads to coordinate on how effectively program budgets are used to achieve local objectives, and make refinements as needed.
 - 3.1.3 Provide ongoing support and capacity building resources to help county representatives meet goals and expectations.
- 3.2 Encourage more robust local jurisdiction and community-based organization involvement in program promotion.
 - 3.2.1 Establish funding and policies to enable CBOs and cities to directly promote BayREN programs.
 - 3.2.2 Provide marketing and communications tools and templates for use by CBOs and cities to promote BayREN programs.
- 3.2.3 Work with counties to define and determine where and who should be targeted as an equity priority community.
- 3.3 Convene cross-jurisdictional meetings to discuss and review BayREN initiatives, strategies, and program priorities.
 - 3.3.1 Identify opportunities that require cross-jurisdictional engagement to help prioritize engagement.

Goal 3: Activate + Empower Counties

Success Factors

- Jurisdictions and CBOs actively promoting and engaging with BayREN and programs
- Percentage of outreach activities (or funds) to equity priority communities by county
- Resources and tools available and used by jurisdictions
- Capacity building for smaller, less resourced jurisdictions
- Number of cross-county partnerships to leverage resources and expertise



Goal 4: Leverage Regional Scale

Leverage BayREN's regional reach and power to establish streamlined, scalable, and innovative solutions to influence market demand, policy, and decision-making to meet California's climate action goals.

Objective: Establish regional-scale initiatives that promote and advance BayREN's mission and goals and distinguish it from other program administrators.

Strategies

- 4.1 Identify pilots and target initiatives that will benefit from multi-sector collaboration.
 - 4.1.1 Establish a protocol for proposing and approving a new pilot program or initiatives.
 - 4.1.2 Create a dedicated funding stream for pilots and targeted initiatives.
 - 4.1.3 Establish an assessment process to determine if and when a pilot can be scaled to a regional or statewide program.
 - 4.1.4 Develop, fund, and test innovative policies or non-CPUC funded programs locally, and then work to advocate adoption of them regionally and statewide, as appropriate.
- 4.2 Build coalitions and partnerships to enable greater regional impact and influence, with innovative funding opportunities.
 - 4.2.1 Engage with the public and private sectors, CCAs, non-profits, and community-based organizations to identify partners for initiatives.
 - 4.2.2 Develop initiative descriptions, details, and information to enable efficient and effective grant applications and to capture funding opportunities.
 - 4.2.3 Identify and track potential grants and funding sources to use for initiatives.
 - 4.2.4 Participate in and lead regional and state advocacy activities for BayREN goals.
 - 4.2.5 Evaluate, develop, and support the adoption of relevant model ordinances, policies, and/or regulations that will accelerate energy and water efficiency, GHG reduction, and the transition to all-electric buildings.
 - 4.2.6 Evaluate and implement regional initiatives designed to streamline program participation and engagement.
- 4.3 Expand regional and statewide brand awareness of BayREN service, capabilities, and impact.
 - 4.3.1 Continue to build stakeholder awareness and engagement of BayREN as a program administrator.
 - 4.3.2 Evaluate benefits and opportunities for growing marketing efforts to constituents and the general public.

Goal 4: Leverage Regional Scale

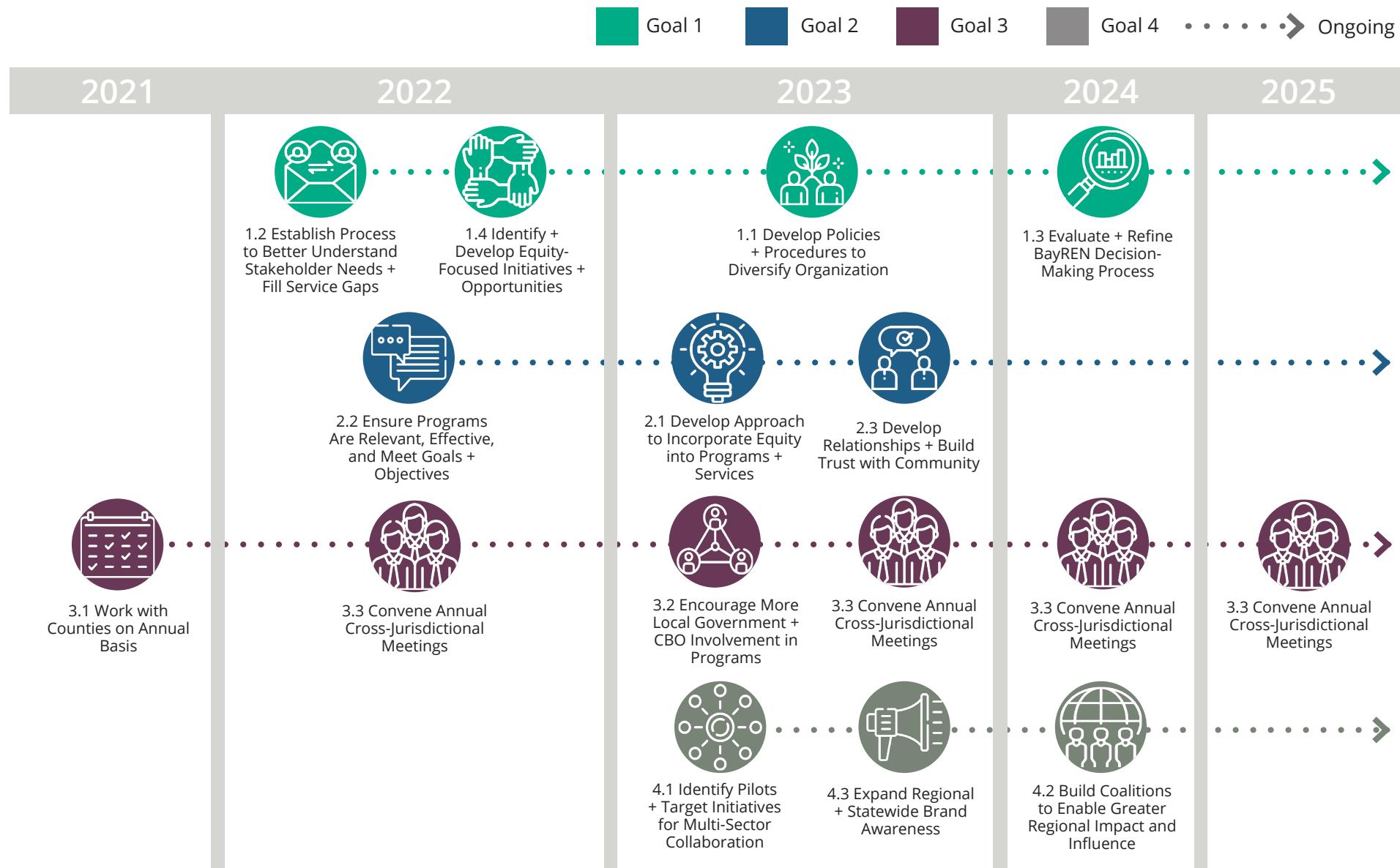
Success Factors

- Number of innovative pilot programs/efforts to test new solutions
- New regional programs launched that scale pilot programs based on lessons learned
- Number of multi-party coordinated support efforts for key legislation, codes, and other policies at regional, state, and federal level
- Number of multi-jurisdictional initiatives and partnerships with other regional and local agencies including CCAs, MTC, BAAQMD, et. al.
- Number of regional policy and partnership activities focused on areas outside of energy and water efficiency and electrification that help to advance equity and state climate goals



Key Milestones

The following Milestones chart illustrates the key strategic tasks by year, organized by goal.



Acknowledgments

BayREN Representatives

Jennifer Berg, BayREN Administrator	Candis Mary-Dauphin, County Lead: Alameda County, Program Lead: Multifamily
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