Outreach and Education Plan

SOLAR-UTILITIES REPORTING, GUIDANCE, & EDUCATION (SURGE)

California Public Utilities Commission

SURGE
Solar-Utilities Reporting
Guidance & Education Program

February 2024

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Introduction

Purpose of the Plan

The purpose of the Outreach and Education Plan for the Solar-Utilities Reporting, Guidance, and Education (SURGE) initiative is to outline the activities necessary to inform and educate contractors, firms, and other stakeholders, such as property owners of qualified projects, that are impacted by Assembly Bill (AB) 2143. The SURGE Outreach & Education Plan will also address knowledge gaps for stakeholders impacted by AB 2143. This plan includes outreach and education tactics to provide information about the payroll submittal compliance requirements, rights, and impacts of noncompliance of AB 2143 to stakeholders. It also addresses partnerships, timeline, and feedback.

Background

AB 2143 (2022, Carrillo) assigned new responsibilities to the California Public Utilities Commission (CPUC) and establishes minimum wage requirements for construction and apprentice workers of qualifying renewable generation electric facilities after December 31, 2023. AB 2143 requires the CPUC to implement a new compliance system to collect and retain payroll records for all qualified projects biannually and provides that a contractor will lose access to standard net energy metering contracts or tariffs in the case of willful violations. The full text of this bill can be accessed at the following website:

https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220AB2143

Solar-Utilities Reporting, Guidance, and Education (SURGE)

SURGE is dedicated to implementing and maintaining a compliance system (SURGE Compliance Portal) to collect and retain payroll records for all qualified projects. While AB 2143 requires contractors to submit payroll records biannually, SURGE allows contractors to submit payroll records biannually, quarterly, or on a monthly basis.

SURGE is also responsible for educating stakeholders, including contractors working on qualified projects, about certified payroll record reporting and other AB 2143 requirements. Through education materials, workshops, webinars, and partnerships with industry associations and utilities, SURGE will guide stakeholders through the compliance requirements. This ensures that contractors are included and allows for all contractors to meet payroll reporting requirements.

Overview of Reporting Deadlines

Per AB 2143, contractors on eligible projects must submit digital copies of certified payroll records twice a year, on July 1st and December 31st of each year via the SURGE Compliance Portal. The CPUC is required to hold these as public records for five (5) years.

Goals and Objectives

The following goals for the SURGE Outreach and Education Plan are designed to ensure that contractors and firms impacted by AB 2143 are fully aware of the regulation and its requirements. Each goal consists of specific objectives to achieve the goals and the status of not started, in progress, or completed.

Goal 1: Develop comprehensive, inclusive, and accessible educational and informational outreach materials for SURGE and ensure that it is available to all stakeholders.

	Objectives	2024 Tasks	Estimated Completion Date
1.1.	Create SURGE key messages and informational content	Identify target stakeholders to understand needs, preferences, and communication styles.	Early January; Ongoing
		Conduct thorough research to inform key messages.	Early January
		Craft concise and impactful key messages that align with the objectives.	Early February
		Ensure key messages are reviewed and finalized by CPUC Project Team.	Mid-February
		Gather feedback to refine and improve content if needed.	Ongoing
1.2.	Design outreach materials for each communication channel	Conduct an analysis on the characteristics and requirements for each outreach channel.	Late February
		Develop a concise brand guide for SURGE including program name, logo, colors, and fonts to use.	Mid-February
		Design outreach materials consistent with brand guide and align messages to convey consistent narrative.	Mid-February
		Establish a clear call to action to prompt stakeholders to take specific actions to report their payroll and comply with SURGE.	Late February
1.3.	Ensure accessibility of outreach materials	Utilize plain language when developing the content for AB SURGE outreach materials. Include alt text and descriptions for images, graphics, and non-	Mid-February

		text content within outreach materials.	
		Develop a process for responding to stakeholders to request accessible outreach materials and information.	Early February
		Publish accessible outreach materials and information process on SURGE website.	Ongoing
1.4.	Update SURGE key messages and informational content as needed	Conduct a monthly review of existing key messages and informational content to see if updates need to be made.	Ongoing
		Keep up to date with changes to requirements and regulations that need to be communicated to stakeholders.	Ongoing
		Gather feedback from key stakeholders to identify where key areas may need to be adjusted.	Ongoing
		Keep an ongoing archive of various key messages and informational content that has been used.	Ongoing

Goal 2: Raise awareness among the key stakeholders about the requirements and implications of SURGE.

	Objectives	2024 Tasks	Estimated Completion Date
2.1	Identify key stakeholders through territory assessment and interviews	Conduct territory assessment as described in the "Key Stakeholders" section.	Late February
		Build list of emails to identify the stakeholders to receive SURGE updates.	Ongoing
2.2.	Create and maintain outreach database	Collect contact details of stakeholders, including names, emails, phone numbers, and other pertinent information and ensure accurate data entry and validation to prevent errors.	Ongoing
		Create categories based on demographics, interests, or other relevant criteria and assign tags	Ongoing

		or labels to contacts for easy segmentation and personalized communication.	
		Periodically review and update contact information to reflect changes and remove duplicate or outdated entries to maintain database accuracy.	Ongoing
2.3.	Share educational outreach materials with stakeholders	Identify and choose appropriate channels for sharing educational outreach materials and tailor the selection based on the preferences and habits of the target stakeholders.	Late February
		Format materials for easy consumption, considering the preferences of the target audience and ensure compatibility with various devices (smart phone, computer, tablet).	Mid-February
		Establish a timeline for material release and consider staggered releases to maintain engagement and prevent information overload.	Mid-February
2.4.	Develop outreach process and channels	Conduct a thorough analysis of stakeholders and segment the audience.	Late February
		Develop a comprehensive strategy outlining how each channel will be utilized to reach and engage the target audience.	Late February
		Develop engaging and relevant content that aligns with outreach goals and adapt content for different channels, ensuring consistency in messaging while optimizing for each platform.	Early January; Ongoing

Goal 3: Build partnerships with industry associations and related organizations to amplify outreach efforts for SURGE.

	Objectives	2024 Tasks	Estimated Completion Date
3.1	Identify additional industry associations and related organizations as partners for SURGE	Identify existing industry associations and organizations involved in renewable energy and construction and understand their sphere of influence.	Ongoing
		Initiate contact with identified industry associations and organizations through emails, calls, or introductory meetings.	Ongoing
		Develop an informal partnership proposal outlining expectations and benefits of partnership.	Mid-March 2024
3.2.	Build relationships with industry associations and related organizations to inform them of SURGE and encourage partnerships	Develop an annual schedule of potential meetings, webinars, or presentations to discuss SURGE process for submitting certified payroll records.	Late February 2024
		Distribute updated informational materials, like brochures or presentations.	Ongoing
		Promote the benefits of partnerships to current partners and propose collaboration opportunities such as meetings and information sharing.	Ongoing
3.3.	Develop communication mechanisms to obtain partners' participation with outreach efforts	Identify and track effective communication mechanisms for partnership participation and outreach efforts.	Ongoing
		Implement a schedule for periodic updates on SURGE progress, milestones, and relevant industry developments.	Mid-March
		Share informative materials, success stories, and any changes to the outreach plan in a timely manner.	Ongoing
3.4.	Provide outreach materials and guidelines to share	Develop an outreach packet to share with partners and other	Mid-March 2024

	with organizations' networks	organizations to distribute information.	
		Develop email template to share information with partners and other organizations.	Mid-March 2024
		Update outreach packet as needed and provide new updates to partners and other organizations.	Ongoing
3.5.	Engage in ongoing communication with industry associations and related organizations	Respond to inquiries from industry associations and related organizations within 24-48 hours of the request.	Ongoing
		Seek yearly feedback and input to ensure outreach and education materials are effectively reaching their networks.	October – December
		Develop and maintain a list of industry associations and related organizations contact information.	Late February; Ongoing

Goal 4: Facilitate educational workshops and webinars to inform key stakeholders, partners, and collaborators about SURGE.

	Objectives	2024 Tasks	Estimated Completion Date
4.1	Coordinate event plan and logistics	Secure and coordinate event venues and addressing logistical needs for the outreach engagement.	Ongoing
		Coordinate with speakers and presenters to ensure event details are communicated and addressing specific requirements of the engagement.	Ongoing
		Develop strategies to engage with event attendees and provide logistical support on day of activities.	Ongoing
4.2.	Conduct outreach for each workshop and webinar	Develop e-blast language and design outreach flyer template to share for event engagement.	Late February
		Set up event registration page template to track the number of	Late February

		participant and utilize form as an opportunity to survey participants.	
		Send frequent notifications of the upcoming event to ensure high participation rates.	Ongoing
4.3.	Facilitate educational workshops and webinars	Ensure audio and visual are ready for each outreach engagement.	Ongoing
		Ensure that all event agenda, slides, and other materials are accessible to each participant.	Ongoing
		Develop a run-of-show schedule for each engagement to ensure efficient usage of time and resources for SURGE engagements.	Ongoing
4.4.	Stay engaged with key stakeholders, partners, and collaborators post event	Collect best practices and lessons learned for all event engagements and debrief with project team.	Ongoing
		Send thank you acknowledgements and other resourceful information to key stakeholders, partners, and collaborators.	Ongoing

Goal 5: Establish a user-friendly online website providing detailed information and resources related to AB 2143.

	Objectives	2024 Tasks	Estimated Completion Date
5.1.	Develop easy to understand web content to add to website	Draft and finalize content for webpages content: • What is SURGE? • Contractor Registration Information • Project Registration Information • Reporting Information • Outreach & Education • Event Calendar • Resources	Mid-February
		Add initial final content to the website.	Late January

		Maintain and update website content on a monthly basis.	Ongoing
5.2.	Design and develop website layout and functionality	Draft layout of website.	Early January
		List out key functionality of submittal requirements for contractors and qualified projects.	Early January
		Develop flow diagram for how website and reporting will integrate together.	Early January
5.3.	Ensure website is mobile friendly	Optimize the website design so that it can be viewed on multiple devices (computer, mobile, and tablet).	Late February
		Open and test the website on various mobile devices (Android and iPhone) and provide feedback to website developers.	Late February
5.4.	Create and maintain SURGE website	Develop list of features on website.	Late December 2023
		Develop draft layout for website.	Late December 2023
		Update and maintain website as needed.	Ongoing
5.5.	Upload all final educational outreach materials to website	Develop a step-by-step guide for uploading educational outreach materials to website.	Late February
		Update and maintain educational outreach materials if any updates to regulations.	Ongoing

Goal 6: Establish a feedback mechanism to assess the effectiveness of the SURGE Outreach and Education Plan.

	Objectives	2024 Tasks	Estimated Completion Date
6.1.	Ensure that there are accessible avenues for all stakeholders to provide feedback to the effectiveness of the outreach and education for SURGE	Establish dedicated phone line and email address for SURGE support.	Late December 2023
		Ensure Chat Bot is running on the website.	Early March
		Develop and keep a log of inquiries to capture information	Late February

		on what is being asked and on what platform.	
6.2.	Develop event summary reports, analyze event outreach outcomes and results and identify and address gaps	Develop template for event summary reports.	Late March
		Develop log for events attended to include when, where, what, and other pertinent information.	Late March
		Discuss and debrief post event to talk about ways to improve.	Ongoing
6.3.	Review analytics from phone, email, website inquiry, event, etc. engagements and develop a frequently asked questions (FAQ) document	Develop a baseline assessment for the first year of phone, email, website, and events.	Late November
		Actively adjust or pivot outreach strategies to adapt to changing preferences.	Ongoing

Key Stakeholders

To support the goals and objectives of the SURGE Outreach and Education Plan, it is essential to include the following key stakeholders in the outreach and education of SURGE: contractors of qualified renewable electric facilities and property owners of qualified projects. Additionally, below is a preliminary list of the stakeholders that would be interested in or impacted by AB 2143.

- **Contractors of Qualified Renewable Electric Facilities.** These stakeholders include construction firms and professionals involved in the development and construction of renewable electrical generation facilities. AB 2143 impacts these groups by requiring that they pay the appropriate prevailing wage requirements and provide biannual reporting information on public works qualified projects.

- **Property Owners of Qualified Projects.** These include individuals or entities that own properties hosting qualified renewable electrical generation projects. AB 2143 impacts property owners through prevailing wage requirements, ensuring fair compensation for construction and related work.

- **Public Utilities Commission.** California Public Utilities Commission (CPUC) is responsible for implementing and enforcing AB 2143 rules and regulations. The central role is to inform and educate key stakeholders and ensure compliance and reporting on progress.

- **Electrical Corporations.** As the entities responsible for generating, transmitting, and distributing electrical power, these electrical corporations play a crucial role for facilitating net energy metering for renewable electrical facilities.

- **Industry Partners.** These include businesses and organizations collaborating with the renewable energy and construction industry. Their role is to help with information sharing and bringing awareness to SURGE rules and requirements for contractors of qualified renewable electric facilities and property owners of qualified projects. Industry partners will contribute valuable insights, playing a crucial role in refining and optimizing the content and information provided to stakeholders. These partnerships are essential for gathering feedback and suggestions, ensuring a more effective rollout of materials.

The identification of further segmentation for each key stakeholder group will be based on the following territory assessment and additional factors such as experience, location, and industry focus.

Territory Assessment

A territory assessment will be conducted to identify key data metrics to aid in the development of targeted outreach to contractors of qualified renewable electric facilities and property owners of qualified projects. The territories are based on each electrical corporation statewide. The following five (5) electrical corporations will be the focus to conduct a thorough assessment.

- Pacific Gas and Electric
- Southern California Edison
- San Diego Gas and Electric
- PacifiCorp
- Liberty Utilities

The key points of data to review and assess will include, but are not limited to the following:

- Size and number of impacted projects
- Number of contractors who have performed relevant work in the region
- Demographics of the population
- Languages spoken
- Income levels
- Internet access
- Additional data points as deemed necessary

The territory assessment findings will help further sharpen the appropriate outreach methods for each region and ensure education materials developed are linguistically appropriate, culturally sensitive, and correctly tailored to each audience.

Key Messages

The primary messages to be conveyed regarding SURGE will be tailored to different segments of the target audience based on the territory assessment as mentioned above. These key messages will help support the goals and objectives of the SURGE Outreach and Education Plan by providing the content needed to inform and educate impacted stakeholders. The following will be the key messages shared across all communication channels and will be tailored, reviewed, and updated as changes/updates occur or as needed.

▪ **What is AB 2143?**
Assembly Bill (AB) 2143, effective January 1, 2024, mandates prevailing wages for construction workers and apprentices on large customer-sited renewable electrical generation (solar) facilities with associated battery storage. Exemptions include residential facilities with a capacity of 15 kW or less, those installed on single-family homes, projects already classified as public works, and facilities serving specific housing types. Contractors must maintain and verify certified payroll records, submitting digital copies twice a year (July 1st and December 31st). Willful wage violations can lead to the loss of net metering or billing tariffs for the associated project.

▪ **What are the requirements of AB 2143?**

Any contractor entering into a contract to perform work on AB 2143 eligible projects, must pay workers, at a minimum, the general prevailing wage per diem, unless the worker is an apprentice registered in a program approved by the Chief of the Division of Apprenticeship Standards, who must receive, at a minimum, the applicable apprentice prevailing rate. Additionally, contractors on qualified projects will need to submit their payroll records through the SURGE website biannually on July 1st and December 31st.

▪ **Who is impacted by AB 2143 and what do you need to do?**

AB 2143 affects contractors and workers performing work on qualified renewable energy projects. Property owners of qualified projects should also be aware of AB 2143 rules and will be required to sign a Prevailing Wage Disclosure form included in the interconnection application.

The rules don't apply to residential projects with a generating capacity of 15 kilowatts or less, certain existing public works, or facilities serving specific types of housing. The following outlines the specific exemptions under AB 2143:

x **Residential Facilities.** The prevailing wage requirements do not apply to residential renewable electrical generation facilities with a maximum generating capacity of 15 kilowatts or less, eligible for service under a standard contract or tariff.

x **Single-Family Homes.** Residential facilities installed on single-family homes, eligible for service under a standard contract or tariff, are exempt from prevailing wage requirements.

x **Public Works Projects.** Projects classified as public works under Section 1720 of the Labor Code and subject to Article 2 of Chapter 1 of Part 7 of Division 2 of the Labor Code are exempt from the prevailing wage provisions.

x **Modular Homes and Multiunit Housing.** Prevailing wage requirements do not apply to renewable electrical generation facilities serving only modular homes, modular home communities, or multiunit housing with two or fewer stories.

Additionally, AB 2143 does not apply to customers not participating in the net metering and net bill tariffs for investor-owned utilities (IOU). This includes publicly-owned utilities (POU) customers as well as non-export commercial companies in IOU territories.

Contractors will need to visit the AB 2143 website and complete the contractor registration and project registration to submit their payroll reports by the reporting deadlines on July 1st and December 31st.

▪ **When does AB 2143 take effect?**
AB 2143 is effective January 1, 2024.

Communication Channels

The following communications channels will be utilized to reach target audiences and share information regarding SURGE: website, emails, e-blasts, and phone calls. These channels facilitate the effective dissemination of information, engagement with stakeholders, and the achievement of key goals outlined in the plan. Here's how various communication channels contribute to supporting the plan's objectives:

- **Website.** The custom website is located at www.cpucsurge.org and it will act as the main source of information about AB 2143 requirements and include tools, required forms, educational materials, frequently asked questions (FAQs), and a link to the online document submittal platform. The website will act as a hub in which all information regarding SURGE will be available to stakeholders. The website will be maintained and updated as needed throughout the life of the program. Key stakeholders can access the website at their convenience, enabling them to review all outreach materials and stay informed about AB 2143 requirements. Additionally, the website will utilize search engine optimization (SEO) strategies to enhance the website's visibility and positioning in organic search results. These strategies include optimizing individual pages of the website for specific keywords using content, meta tags, headers, and images (alt-text) to make them more search engine-friendly.

- **Chat Bot.** The website will include a simplified chat bot interface to engage with website visitors, answer queries promptly, and enhance overall user experience. This will work by providing a list of pre-listed frequently asked questions about SURGE information. These questions will include: 1) What is SURGE? 2) Am I impacted by SURGE? 3) I am a contractor, how do I know if my project has SURGE compliance requirements, and 4) How do I report my payrolls for SURGE? Additional questions will also be developed as more inquiries are received. If the chat bot is unsuccessful at answering website visitor's inquiries, they will be prompted to send an email or call the dedicated phone line for SURGE information.

- **Emails.** Email provides a convenient channel for key stakeholders to seek immediate clarification and assistance to help contribute to their understanding of SURGE and promoting compliance. All email inquiries will be responded to within 24 business hours. The dedicated email address for SURGE inquiries and feedback is info@cpucsurge.org. An analysis of email inquiries will be conducted to identify common areas of confusion to help improve the information shared on the website.

- **E-Blasts.** Occasionally, e-blasts with SURGE information will be shared and disseminated to the outreach database. This will be used as a communication channel to inform stakeholders about current SURGE compliance requirements,

updates, and other relevant information. These e-blasts will be designed and sent through Constant Contact.

- **Phone Calls.** Phone calls will provide one-on-one education assistance which directly addresses key stakeholders' specific queries, supporting the goal of providing support to the overall understanding of SURGE compliance requirements. The dedicated phone line for SURGE inquiries, questions, and feedback is1-800-549-2143. Any inquiries on voicemails will be responded to within 24 business hours. An analysis of phone inquiries will be conducted to identify common areas of confusion to help improve the information shared on the website.

- **Outreach Events.** Outreach events provide a unique opportunity for face-to-face interaction, enabling direct communication between key stakeholders. If possible, in-person events will include an exhibition table that will help disseminate information and provide on-site guidance to contractors and property owners for SURGE. Outreach events are also an opportunity to network with a variety of stakeholders and gain an understanding and feedback for the impact of SURGE.

Milestone Timeline

Below is the annual schedule for the SURGE Outreach and Education Plan which includes the tentative annual deadlines for each milestone activity.

Milestone Activity	Annual Deadline
1) SURGE Outreach and Education Plan Annual Update	Every Early October
a) Facilitate and Host 1 Annual Workshop (In-Person or Webinar) to Present SURGE Outreach and Education Plan	Every Mid-November
2) Recording and Responding to Comments Received from Stakeholder Workshops and Webinars	Per Event
3) Develop and Maintain Communication Channels Dedicated Phone Line, Email Service, and Online Chat Interface for SURGE Inquiries	Ongoing
a) **Dedicated Phone Line**	End December 2023
b) **Email Service**	End December 2023
c) **Online Chat Interface (Chat Bot)**	Late February 2024
4) Develop Outreach and Educational Materials as Listed in SURGE Outreach and Education Plan and Incorporate Any Updates in Policies or Regulations	See specific timelines below for collateral materials:
a) **Website** ▪ Content Language (About SURGE, Outreach/Education Materials, Calendar of Events, Resources, Reporting & Compliance Guidance and Steps)	Late January 2024
b) **SURGE Fact Sheets**	Late January 2024
c) **SURGE Payroll Reporting Guidelines**	Late January 2024
5) Translate SURGE Outreach and Educational Materials	Ongoing
6) Facilitate and Host 2 Annual In-Person Community or Industry Events per Calendar Year	April & September
7) Provide Outreach Materials for Posting to CPUC Website	Ongoing

Educational Materials & Online Resources

The AB 2143 Outreach and Education Plan includes various types of comprehensive and accessible educational materials and online resources that will be provided to key stakeholders.

Resources	Description	Development Timeline
Flyers, Fact Sheets, & Other Written Materials	Outreach materials such as flyers, fact sheets, prepared written materials, etc. will be developed to share detailed information on SURGE requirements and compliance information. These PDF outreach materials will be uploaded and posted to the SURGE website for easy online access and download by all stakeholders. Please note that digital materials will be prioritized over printed collateral. Additionally, final resource materials will be shared with CPUC to add to their websites and quick design graphics will be developed to share to social media outlets with links to final documents.	Late January 2024 (Initial); Ongoing
Social Media Posts and E-Blasts	Short and engaging social media posts will be used to produce eye-catching content and disseminate bite-size information and updates regarding SURGE. E-blasts will also be utilized as targeted email communications to deliver important announcements and resources to key stakeholders.	Early January 2024
Website Content	SURGE will have a dedicated user and mobile friendly website to act as a centralized information hub to easily provide navigation and up-to-date content and information to key stakeholders. Education and outreach materials will be available on the CPUC website to ensure widespread accessibility of information. Additionally, SEO optimization will be prioritized on the website to ensure contractors are able to search and find SURGE information and requirements.	Mid-January 2024
Frequently Asked Questions (FAQ)	Inquiries or questions that are frequently asked by stakeholders will help to produce SURGE FAQs. These FAQs will be available on the website and accessible by all stakeholders. This information will help to clarify stakeholders' questions.	Late January 2024
One-on-One Education Assistance	Upon request, stakeholders, specifically qualified reporters, will be able to access on demand one-on-one education assistance to help provide personalized guidance and clarification to address specific inquiries promptly and on how to navigate the online document submittal process.	Ongoing

Educational Videos	Prerecorded educational videos will be developed to share information on SURGE and instructions on the CPUC online document submittal process. This will offer a dynamic visual learning experience, breaking down complex concepts into easily digestible segments for enhanced understanding.	Mid-March 2024

The development of these educational materials aligns with the goal and objectives. There may be additional educational materials and online resources that are not currently on this list. If there are other creative ways to share information, this will be proposed to the CPUC Project Manager for approval. The SURGE Outreach and Education Plan outlines the development of a comprehensive and inclusive strategy, ensuring that educational materials and resources are easily accessible, regionally relevant, and communicated through a variety of mediums for maximum impact.

Translation of Materials

Ensuring that outreach materials are accessible to diverse linguistic communities is crucial for the success of the SURGE Outreach and Education Plan. The translation process involves several steps to guarantee accurate and culturally sensitive translations. Below is the step-by-step process.

1) **Identify Target Languages.** During the territory assessment, identify and determine the languages in each territory and prioritize based on community prevalence and needs.

2) **Collaborate with Language Experts.** Engage with professional translators fluent in the targeted language who are experienced working with government entities and are experts in translating technical materials.

3) **Develop a Translation Plan for Materials.** Create a plan outlining all outreach and educational materials, target languages, and timeline and prioritize based on relevance and impact of information.

4) **Conduct Translation and Quality Assurance.** Review and ensure accuracy of translated materials. Conduct thorough reviews and quality assurance measures, including cultural sensitivity checks.

5) **Obtain Feedback and Integrate.** Gather feedback from key stakeholders, make revisions, and finalize translations. Ensure that translations are seamlessly integrated in the outreach strategy, monitor the effectiveness of initiatives, and utilize insights for continuous improvements.

Website Layout

The SURGE website serves as the primary destination for individuals seeking information on rules and regulations, encompassing a registration portal for contractors and projects to submit prevailing wage payrolls. All outreach materials will be housed on the SURGE website. The preliminary website structure is outlined in the basic layout below, with the complete website anticipated to be operational by the end of January 2024. Please note that the layout is in an initial draft and will be updated based on the website development capabilities.

Stakeholder Workshops & Webinars

To educate stakeholders on SURGE, there will be at least two (2) hosted presentations or webinars (not to exceed 6) per year to share information on reporting requirements, procedures, and impacts for non-compliance. Events will educate participants on SURGE and allow for questions and provision of technical assistance.

Presentations may be held at public meetings, hosted by other CPUC programs or other partners/collaborators, or organized in-person or via webinar. Each engagement will consist of providing hosting services, agendas, presentations and other collateral materials, recording feedback and other information. Recording of instructions and webinars will be uploaded to the website and available on-demand online.

Finally, following up each engagement, a summary of stakeholders' written and verbal feedback will be provided to be analyzed for ways to continuously improve engagements moving forward.

Event Coordination

All workshop and webinar materials, such as PowerPoint presentations, agendas, and other materials will be developed for each workshop. Physical sign in sheets will be used for in-person events and for virtual events, information will be collected through the chat function or using an online form. By doing so, the outreach database will be able to grow over time and expand the ongoing outreach efforts.

Trainers and Instructors

In preparation for each stakeholder workshop and webinar, trainers and instructors will be identified ahead of each engagement. The selection will be based on their availability and capacity for each engagement. The following individuals have been designated as instructors for SURGE requirements:

- Sylvia Linn, Project Manager
- Ariana Fernandez, Senior Prevailing Wage Consultant & Trainer

Event Outreach

To effectively inform stakeholders of workshops and webinars, the outreach database will be used in addition to leveraging partner associations to help notify contractors of workshop and webinar locations, dates, and times. The event information will be posted on the SURGE website, e-blasts will be sent out, and other territory-specific forms of outreach will be utilized to notify the outreach database about these workshops and webinars.

Event Approach

To ensure that contractors comprehend SURGE requirements and impacts of non-compliance, the training staff will simplify technical requirements into easily understandable material for contractor audiences. The trainers will utilize PowerPoint presentations that employ less technical language, include easy-to-understand

directions, and utilize graphics and diagrams for visually explaining SURGE compliance requirements.

Interactive tools will also be used in webinars to facilitate learning and enhance engagement from contractors. By utilizing polls within webinars, questions will be posed to audience members to gauge their understanding of topics discussed through quiz-oriented questions, or solicit engagement by polling participants on survey-like questions that include but are not limited to:

- Is this your first-time hearing or learning about SURGE requirements?
- Are you aware of the penalties for non-compliance and how they affect your business?
- How often must you (the contractor) submit reports as required by SURGE?
- When does AB 2143 become effective and affect contractors?
- Do you understand how to register for the SURGE Compliance Portal (via Submittable) to submit required documents?
- Do you know how to prepare certified payroll/prevailing wage reports?

Lastly, to improve attendance and encourage continued learning, each webinar and presentation will be recorded. Within a week of each webinar or presentation, recordings will be made available online. Links to these recordings will be placed on the SURGE website so that contractors can easily access them anytime. Contractors that access the website will be able to review these recordings, and utilizing our help line, email address, and chat interface on the website, contractors can reach out with additional questions.

These recordings and/or meeting notes will also be posted on the CPUC website and social media accounts to expand education and awareness. The social media posts made by the CPUC should also include information to direct visitors to the SURGE website for further information and to submit inquiries.

Partnerships and Collaborations

To ensure the success of the implementation of SURGE, it is important to drive continued engagement from industry stakeholders including various solar and energy associations across the state. Relationships with the following stakeholders will be established to allow for an open dialogue and sharing of important regulatory information.

Stakeholders will benefit from these partnerships by being the first to know about important updates and changes, upcoming training, and other program information to assist and add value for their members as well as attract new members.

These partnerships will be leveraged to disseminate information to impacted vendors, receive feedback and input, and understand overall impressions of program implementation. Additionally, association partners will be leveraged for their assistance with in-person outreach events and statewide workshops as needed.

Here are the steps to engage with these industry partners:

1. **Identify Key Industry Partners.** Identify and prioritize industry partners who are directly relevant to the goals and objectives of SURGE. Consider organizations, companies, or associations that share a common interest in renewable energy, construction, or related fields. The list below is just a preliminary list of industry partners, there will still be opportunities to identify industry partners throughout the program engagement process.

2. **Conduct Outreach & Introduction.** Initiate outreach to potential industry partners through various communication channels such as emails, phone calls, or in-person meetings. Introduce SURGE, explain its objectives, and highlight the potential benefits of collaboration. Clearly articulate how industry partners can contribute to and benefit from the initiative.

3. **Collaborate and Plan.** Collaborate with industry partners to develop joint plans and strategies for outreach and education. This may involve joint events, shared resources, or coordinated outreach efforts. Ensure that the collaboration aligns with the mutual interests of both parties and contributes to the overall success of SURGE.

4. **Maintain Ongoing Communication.** Establish and maintain ongoing communication channels with industry partners. Keep them informed about SURGE updates, milestones, and any relevant industry developments. Actively seek their input, feedback, and suggestions to ensure a mutually beneficial and sustained partnership. Regular monthly or quarterly check-ins and updates contribute to a positive and enduring relationship.

Below is the list of preliminary partners and respective websites.

Industry Partners*	Website
California Solar & Storage Association	www.calssa.org
Solar Energy Industries Association	www.seia.org
Agricultural Energy Consumers Association	www.agenergyca.org
California Farm Bureau Federation	www.cfbf.com
Small Business Utility Advocates	www.utilityadvocates.org
California Building Industries Association	www.cbia.org
California Energy Storage Association	www.storagealliance.org
Independent Energy Producers Association	www.iepa.com
Rising Sun Center for Opportunity	www.risingsunopp.org
GRID Alternatives	www.gridalternatives.org

*Additional partners may be identified as the program progresses.

Promotion and Outreach

The plan to conduct widespread promotion and outreach for SURGE includes employing tailored strategies across various electrical corporation territories to ensure maximum reach and engagement. Recognizing that each region represents a diverse population, the plan strategically targets specific areas and incorporates both digital and in-person approaches.

- Pacific Gas and Electric
- Southern California Edison
- San Diego Gas and Electric
- PacifiCorp
- Liberty Utilities

Outreach Database

To develop the outreach and contact lists for reach region we will work with electrical corporations (Pacific Gas and Electric, Southern California Edison, San Diego Gas and Electric, PacifiCorp, and Liberty Utilities) and the program administrators of relevant programs like Self-Generation Incentive Program and Solar on Multifamily Affordable Housing to obtain contractor information which includes the following:

- Contractors with the appropriate North American Industry Classification System codes (industry focus)
- Contractors who have performed work on impacted projects (experience)
- Property owners of impacted projects

The outreach database will be designed to allow for communication to the entire list or a specific territory and will be maintained and updated to remove duplicative contact information and include new contractors identified through other means, such as outreach event attendance.

Distribution & Display of Materials

To ensure that education materials will be effectively distributed across targeted territories, the following outreach strategies will be integrated:

- **Utilize Website as SURGE Outreach Material Hub.** The SURGE website will act as a hub with all outreach materials and information needed that can be shared to all targeted territories. Label and identify which outreach materials and information are designated specifically to a targeted territory or can be used generally. Maintain an archive of original digital library for easy retrieval of information.

- **Leverage Partnerships to Disseminate Information.** After establishing partnerships with industry associations and other relevant organizations, SURGE information will be shared with these entities to disseminate information to their respective networks.

- **Tailor Messaging to Each Territory.** If necessary, customized outreach materials will be prepared for each targeted territory to consider regional nuances, language preferences, and specific needs identified in the territory assessment. This will help meet the objective of providing accessible and comprehensive outreach materials for SURGE.

Other strategies may be identified as the plan progresses and these will be brought to the attention of the CPUC Project Manager as a proposal to enhance outreach efforts.

Endorsement at Community or Industry Events

Participation at in-person community or industry events will be approached with strategic intent to bring awareness to SURGE. A thorough research will be conducted to identify industry-specific events that align with SURGE outreach goals. These events may include conferences, trade shows, seminars, or other community events that attract the target audience to provide opportunities for engagement. Additionally, outreach (email, phone, or word-of-mouth) will be conducted to industry experts and organizations to inquire about potential events to participate in and make valuable connections. This initiative recognizes the value of direct engagement with stakeholders and also establishes a thoughtful strategic approach to ensure effective utilization of resources.

- **Target Events.** Events will be strategically selected based on relevance, attendance demographics, and potential impact on SURGE awareness. Additionally, guidance to attend specific events will be sought from the CPUC Project Manager. It is recommended to prioritize events that will attract significant representation of key stakeholders.

- **Outreach Exhibit Tables.** Outreach exhibit tables can play a pivotal role in fostering direct engagement, sharing information, and building community awareness. If possible, tables with outreach materials will be placed at community or industry events along with staff who are knowledgeable and well-versed in SURGE requirements and information. It will also be significant to create displays with clear signage, banners, and other graphics that convey the key messages of AB 2143. These outreach exhibit tables can also contribute to the goals and objectives established by the SURGE Outreach and Education Plan by facilitating community connection and feedback collections during specific engagements.

Feedback Mechanisms

The SURGE Outreach and Education Plan includes robust feedback mechanisms as part of the objective to foster an open dialogue with key stakeholders. These mechanisms are designed to engage with key stakeholders and provide them with avenues to express concerns, seek clarification, and contribute valuable insights to enhance outreach initiatives.

- **Help Line.** A dedicated help phone line will be established to facilitate direct communication between contractors and knowledgeable representatives. Key stakeholders can utilize the help line for immediate assistance with questions, concerns, or clarifications related to SURGE. This direct line of communication aims to provide key stakeholders with timely and accurate information.

- **Email Inquiries.** Key stakeholders and other stakeholders are encouraged to reach out through the provided email address for written correspondence. Emails will provide a traceable record of inquiries, allowing for thorough responses to ensure that all questions are adequately addressed.

- **Chat Interface on Website.** The website will feature a simple, user-friendly chat interface that can provide real-time assistance for pre-prompted inquiries. Contractors will be able to seek instant clarifications or guidance through the chat interface. However, if issues are unresolved, the chat interface will prompt the contractors to call or email SURGE support at info@cpucsurge.org.

Monitoring and Evaluation

Effective monitoring and evaluation are fundamental components of the SURGE Outreach and Education Plan, ensuring the achievement of goals and objectives and promoting continuous improvement. The exhibit below shows the four phases that will be employed to support the monitoring and evaluation of the plan. Additionally, key performance indicators (KPIs) have been developed to quantitatively measure the degree of success for each goal and objective.

Four Phased Approach for Monitoring and Evaluation
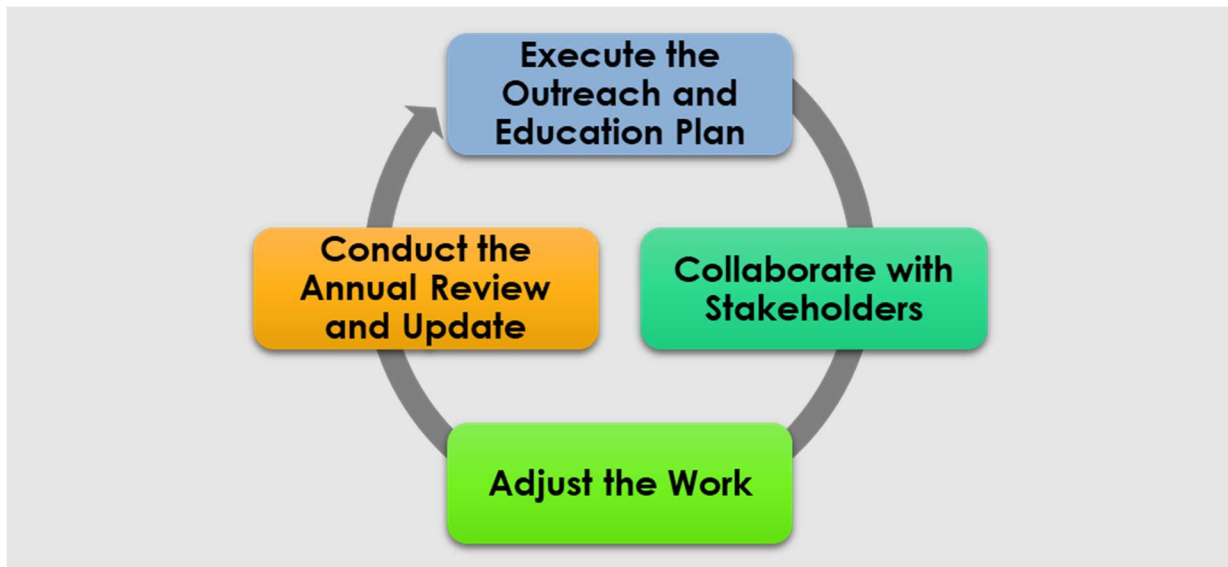
1. **Execute the Outreach and Education Plan**

   The initial step to monitor and evaluate the effectiveness of the SURGE Outreach and Education Plan involves implementing the planned activities in the strategy. The project team is responsible for executing the plan and ensuring that the activities align with defined goals and objectives, utilize appropriate resources and tools, and adhere to established timelines. Regular progress checks and coordination meetings among team members are essential during this phase to maintain alignment with the plan's goals and objectives.

2. **Collaborate with Stakeholders**

   Effective collaboration with SURGE stakeholders is a continuous and integral aspect of the monitoring and evaluation process. This step involves engaging with various parties involved or impacted by SURGE. Regular monthly or as-needed communication, feedback sessions, and collaborative decision-making contribute to a more comprehensive understanding of SURGE regulations and requirements. Stakeholder collaborations ensure that the execution of the plan remains responsive to the evolving needs of each stakeholder.

3. **Adjust the Work**

    This phase is critical to the iterative nature of the monitoring and evaluation process. As work progresses and more data and information are analyzed, adjustments to outreach strategies, tactics, or specific activities may be necessary. This phase involves making informed modifications based on insights gained from the monitoring process, stakeholder feedback, and evaluation findings based on KPIs. Adaptability and willingness to course correct are essential to ensure that the plan remains effective and aligns with the evolving landscape of AB 2143 regulatory requirements.

4. **Conduct the Annual Review and Update**

    Regular reviews and updates are essential to maintaining the relevance and effectiveness of the plan. The annual review will involve a more comprehensive assessment of the plan's performance, and this is described in the section entitled "Annual Update & Reporting." This phase involves evaluating the impact of outreach activities, analyzing stakeholder feedback, and assessing the achievement of goals and objectives. Based on these findings, the plan will be updated to incorporate lessons learned, address challenges, and integrate other areas for improvement. The annual review and update process will ensure that the plan remains a dynamic and responsive tool for the outreach and education for SURGE.

Key Performance Indicators

Key Performance Indicators (KPIs) are measurable and quantifiable metrics that organizations use to evaluate and assess their performance in achieving specific goals and objectives. The following KPIs will be adapted and tailored to each specific goal and objective as applicable. KPIs provide a way to measure progress, monitor success, and identify areas that may require improvement. They serve as benchmarks for performance, helping CPUC align outreach and education activities with strategic objectives and make data-driven decisions. Adjustments may be made to align with the nature, scale, and goals/objectives of the SURGE Outreach and Education Plan. Additional KPIs may be identified throughout the life of the plan.

Area	KPI Metrics

Goal & Objective Attainment	✓ Percentage of achieved goals compared to the planned objectives.
	    o Activity Completion
	    o Objective Met

Stakeholder Engagement	✓ Number of stakeholders actively engaged in project activities. o Outreach Database

Outreach Effectiveness	✓ Percentage increase in awareness or knowledge among the target audience.
	    o Website Traffic
	    o Page Views
	    o User Engagement
	    o Phone, Email, & Chat Engagements

Participation Rates	✓ Percentage of stakeholder participation in events, surveys, or feedback sessions.
	    o Event Attendance (At least 50% of registered attendees are participating)
	    o Surveys Completed (At least 10% of surveys completed)
	    o Feedback Received (At least 10% of surveys completed)

Timeliness	✓ Adherence to established timelines for project milestones and deliverables. o Average Time to Complete Activity, Task, or Deliverable
Feedback Response Times	✓ Average time taken to respond to stakeholder feedback or inquiries. (All inquiries responded to within 24-48 hours.)

Accessibility	✓ Evaluation of how accessible project information and resources are to the target audience.
	    o Number of Translation Requests
	    o Number of Translated Documents

Adaptability to Stakeholder Feedback	✓ Number of adjustments or improvements made in response to stakeholder feedback.

Annual Update & Reporting

The SURGE Outreach and Education Plan is designed to be a dynamic and responsive framework that evolves with input from CPUC and key stakeholders. This collaborative approach ensures that the plan will stay effective, relevant, and aligned with the evolving needs of the industry.

Annual Plan Update

The plan will undergo an annual review and update process, incorporating feedback and input from CPUC and key stakeholders received from feedback channels. The goal for this is to refine the strategies in place, improve outreach methods, and address emerging challenges. The update will commence towards the end of each calendar year, allowing for the integration of lessons learned and adjustments.

Annual Plan Workshop

To enhance transparency and foster a collaborative communication channel, one workshop (either in-person or webinar) will be held per year to present the updates to the Outreach and Education Plan for the following year and address issues that members of the public raise. The annual workshop will encourage the active participation of the key stakeholders and other relevant parties or organizations.

Annual Plan Reporting

Following each SURGE Outreach and Education Plan workshop, a comprehensive summary report will be generated, capturing key points discussed during the meeting. The insights gained from the annual workshop and ongoing feedback will be instrumental in refining the overall plan. In addition, actionable recommendations and areas of improvement will be incorporated into the plan to contribute to continuous enhancement. Please see public comments in Appendix A.

Appendix

Appendix A: Public Comments

The following is a summary of public comments received on Friday, January 12, 2024 from the California Solar and Storage Association (CALSSA):

- Regarding the definition of "public works," there is ambiguity if repair work will be included in AB 2143. Recommended to remove language to avoid confusion.
- Ensure that SURGE focuses on the process for submitting certified payrolls and not weigh in on regulations or requirements that need to be settled by the Department of Industrial Relations and the California Public Utilities Commission.
- Remove and replace "What is AB 2143?" content with specific language.
- Update the language "What are AB 2143 requirements?" from "Any contractor entering into a contract to perform work on AB 2143 eligible projects" to "Any contractor entering into a contract to perform work on the construction of an AB 2143 eligible project."
- Update the language in "Who is impacted by AB 2143 and what do you need to do?"
- Change the statement for when AB 2143 goes into effect: "AB 2143 is effective January 1, 2024."
- Remove "Why is AB 2143 is important?" because it is not the purpose of the website.
- Request for other parties and stakeholders to review fact sheets and educational materials.
- Request to beta test the SURGE Compliance Portal for certified payroll submissions.