

TIMELINE MODULE  
FACILITATOR RESOURCES  
  
Session Agendas and Materials for Facilitators

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## INTRODUCTION

This document includes key resources from the Partners Advancing Climate Equity (PACE) Pilot Program’s Timeline Module, which have been modified to enable other facilitators and community leaders to adapt and use PACE resources. This document includes facilitator agendas from full cohort sessions and learning group sessions organized as part of the PACE Pilot Program’s Strategy Module. Additional resources, such as sample presentation slides and worksheets, are included as links.

### BEFORE YOU START

**We recommend first reviewing the** [PACE Resource Navigation Guide](https://docs.google.com/document/d/1OI2DnlXUwOQwAqzcG_GXoDAwBY4ygDG_fd6557sCikY/edit#heading=h.2hl5p8yvh81g) **to understand *what* is included in this document and *how* to utilize PACE facilitator resources best.**

The PACE Pilot Program featured a multi-faceted approach to cohort learning, capacity building, and leadership development with many interconnected program activities and structural elements. The Resource Navigation Guide provides a high-level overview of program goals and values, key terms and definitions, and important structural elements (such as the types of sessions organized, the Vision-Assessment-Strategy-Timeline (VAST) program design, and the Phase 1 syllabus) to help you best navigate and utilize PACE facilitator resources. While we designed these resources for virtual PACE sessions, you can adapt them for in-person events.

### GETTING STARTED

**We recommend creating a copy of this Google document and adapting its contents to best suit your needs, paying particular attention to the following markers:**

**→ Important guidance, displayed in purple bolded text with a purple arrow**,

*Sample PACE content to review and update, displayed in gray italicized font*, and

Standalone activities, displayed in orange boxes,   
which are also linked directly in the Table of Contents.

For more information about the PACE Pilot Program and to view additional resources for community leaders, please visit <https://sgc.ca.gov/>.

## TIMELINE I FULL COHORT SESSION

### KEY SESSION INFORMATION

**Key Theme/Topic:** California Climate Finance

**Estimated Time Needed:** 2 hours

**Materials Needed:**

* Presentation Slides (e.g., PowerPoint or Google Slides)

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1JZNHk6rwNaHD6yWMIovvLf-uSnPBN97YykUPAAta9Q8/edit) **that you can copy, modify, and use!**

**Session Roles for Facilitators:**

**→ Update and assign roles based on your final session agenda and format.**

| **ROLE** | **ASSIGNED TEAM MEMBER** |
| --- | --- |
| Master of Ceremonies (MC) |  |
| Additional Facilitators / Breakout Group Facilitators |  |
| Presenters |  |
| Chat Monitor |  |
| Time Keeper |  |
| Vibe Checker (keeps tabs on group agreements and energy levels) |  |
| Music |  |
| Technology Lead - Recording and Breakout Groups |  |
| Notetaker(s) |  |

### 

### FACILITATOR AGENDA

#### Convene (10 minutes)

**Welcome (3 minutes)**

* Set a welcoming tone with music and greetings.
* Share ‘as you arrive’ prompt verbally and in chat.
  + *Are you/how are you re-entering social/work/family life in this “almost post-Covid” time?*
* Share some words of welcome.

**Housekeeping (2 minutes)**

* Review group agreements and reminders.
  + *Reminders of group agreements and Zoom etiquette, self-care, etc.*

**→ Here are the** [PACE Group Agreements](https://docs.google.com/drawings/d/1ux7mChnEne7-9yD5EZjTQ7xmqIeWOi__XSqGbIchgMw/edit?usp=sharing) **as an example.**

* Provide a brief overview of the session agenda.

#### Connection (10 minutes)

**Land Acknowledgement**

* Invite one participant to provide a land acknowledgment.

**→ Rather than asking participants to provide a brief land acknowledgment as part of their introduction, we instead invited one participant to give an extended land acknowledgment for each full cohort session.**

* + *The participant shares their location, the people who stewarded it prior to colonization, their current struggles, and one earth-based practice they used/use.*

#### Compost/Compose (5 minutes)

**Embodying Abundance**

#### Capacity (75 minutes)

**Presentation: Funding vs. Financing (15 minutes)**

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1JZNHk6rwNaHD6yWMIovvLf-uSnPBN97YykUPAAta9Q8/edit#slide=id.ge21b6eadf5_0_3) **that you can copy, modify, and use!**

* Funding (monies provided by govt or other entities that do not have to be repaid)
  + *Diff. sources: taxes, fees, donations, or other public sources.*
  + *Common avenues for community organizations: Grants (specified goals, eligibility criteria; multiple awards). RFPs (specified scope of work, typically 1 award). Sponsorships. Donations (one-time, recurring; individual, major; mail-in vs. online). Also consider fee for service models.*
  + *Pros: Dependent on available funds; may not be sustainable long-term (funder priorities could change); no repayment; can be unrestricted.*
  + *Cons: Administrative/reporting requirements could be burdensome; applications can be time-consuming; competitiveness.*
* Financing (monies provided by a public or private lender; must be repaid over a specified term)
  + *Need business case/financial model to demonstrate viability/repayment*
  + *Common financing mechanisms for community organizations: Loans (nonprofits can qualify for no-interest loan programs; important to have a plan for repayment). Credit. Investments (upfront capital or unrestricted funds needed → return on investment) can invest in stocks/bonds and get a tax-free return // endowments - continuous growth, typically principal capital is not withdrawn and investment returns are split between reinvestment and operations, typically larger nonprofits // real estate - could form a Community Development Corporation. Financial incentives: rebates [project vs. program; incentives typically for concrete projects, retrofits, equipment, etc. - could be used to reduce operational costs, e.g. energy bills] // tap into financing mechanisms available to residents/households: on-bill financing, PACE financing,* [gogreenfinancing](https://gogreenfinancing.com/residential) *to reduce potential program costs / provide financial relief to community members.*
  + *Pros: Money can be provided quickly and upfront; can accelerate implementation.*
  + *Cons: Repayment; added cost to effort (depending on repayment terms), the business case needed that may not fully capture social impacts.*
* Combining funding and financing can unlock other benefits: fund larger projects, drive financial sustainability, make unaffordable projects affordable (don’t need to use all types).
* Other ways to reduce cost: Group purchasing, In-kind donations, Pro-bono support, Non-profit discounts, Build capacity to increase efficiency and impact. Automation. Engage your board members. Accurate project planning.

**Presentation: Case Studies of Asset Building (40 minutes)**

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1JZNHk6rwNaHD6yWMIovvLf-uSnPBN97YykUPAAta9Q8/edit#slide=id.ge221844d9c_0_28) **that you can copy, modify, and use!**

* Context - Billions and even trillions of $ will be earmarked to address climate and labeled as “Climate Finance’ - the vast majority of said finance will be looking for market rate returns and will be slow to be allocated to adaptation projects or community needs under the business as usual paradigm.

**ACTIVITY: CASE STUDIES OF VARIOUS FINANCED PROJECTS**

**Briefly share Boston Ujima and Winona’s Hempire as examples from outside of CA (vertical integration, sankofa, de-risking finance)**

**Round 1: Get familiar with 1 case study in 4 groups (5 minutes)**

**→ Here is a** [template document with the four case studies from PACE](https://docs.google.com/document/d/1cV9THRsso1nywfMNGGVuimrUfwnLs7GfSelDR7ZlHck/edit) **that you can copy, modify, and use!**

* Using the briefs, each group will teach and learn one of the case studies.

**2-3 minute stretch**

**Round 2: Break into four groups with one person from each group from Round 1 in each. (20 minutes)**

* Each group member to share case study from Round 1 and learn about the other 4 from the other leaders.
  + *From example 1-4, take about 4 mins each example to share the example from Round 1. If there is more than 1 person who knows the example, you can share it together.*

**In Chat**

* Reactions and wrap up.

**Presentation: CA’s Priorities and Opportunities (20 minutes)**

* State Budget process (7-10 minutes)
  + *High-level budgeting process overview.*
  + *More detailed process:* <https://www.senate.ca.gov/sites/senate.ca.gov/files/the_budget_process.pdf>
  + *Current process update*
  + *Advocacy avenues*
* CCI
  + *Foundational source of funding for climate*
  + *Diff. state agencies administer diff. Grant programs*
  + *C/T equity issues? Legislative mandates for investments in “DACs”?*

#### Close (20 minutes)

**Summary**

* Quickly go over a summary of the session using the slides.
  + *Share roadmap slide*
* Ask for volunteers for the next session.
  + *Role 1 (check-in):*
  + *Role 2 (check-out):*
  + *Role 3:*
* Announcements and updates

**Check Out**

* Share check out prompt in Chat, Mentimeter, GoogleJamboard sticky notes, or go around the Zoom Room.
  + *Name an activity that will bring you joy this weekend (e.g. sleeping, music)*

## TIMELINE I LEARNING GROUP SESSION

### KEY SESSION INFORMATION

**Key Theme/Topic:** Codes

**Estimated Time Needed:** 1 hour

**Materials Needed:**

* Presentation Slides (e.g., PowerPoint or Google Slides)

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1JZNHk6rwNaHD6yWMIovvLf-uSnPBN97YykUPAAta9Q8/edit#slide=id.ge1295d3c42_0_73) **that you can copy, modify, and use!**

* Group Agreements

**→ Here are the** [PACE Group Agreements](https://docs.google.com/drawings/d/1ux7mChnEne7-9yD5EZjTQ7xmqIeWOi__XSqGbIchgMw/edit?usp=sharing) **as an example.**

**Session Roles for Facilitators:**

**→ Update and assign roles based on your final session agenda and format.**

| **ROLE** | **ASSIGNED TEAM MEMBER** |
| --- | --- |
| Facilitator(s) |  |
| Notetaker(s) |  |
| Jamboard Lead |  |

### FACILITATOR AGENDA

#### Convene (5 minutes)

**Agenda (2 minutes)**

* Review session agenda.

**Group Grounding (3 minutes)**

* Reiterate (Group) agreements.

#### Connect (10 minutes)

**Review (4 minutes)**

* + *“We covered the types of funding, went over the State budget process and how cap and trade works, and then shared info on asset building models that are different from what we typically see in the climate finance world.”*
* Recap on examples of using CA climate investments to address needs and build assets.

**Pair Share (6 minutes)**

* Share an insight or what you found inspiring from the examples shared last week.
  + *Other ideas or examples from your work? What do/would asset-building strategies look like for you?*

#### Capacity (35 minutes)

**Desirability, Feasibility, Viability (5 minutes)**

* *Today, we want to continue exploring which opportunities we choose to pursue, especially in regard to funding. Which grants and projects do we choose to prioritize?*
* *The framework you see here is a concept borrowed from Human-centered Design. It prompts us to sequence desirability, feasibility, and viability in that order. (Slide)*
* *First, get clear and aligned on what it is we need and wish to see in the world. Then filter those visions through feasibility factors like assets, blocking and catalyzing relationships, and the other pieces of the CNA you’ve worked on. Then you can hone in using the viability lens. This approach untangles the 3 lenses.*
* *Usually, the 3 filters are bundled together in brainstorms, or they happen in the reverse order, starting with the viability lens: what funding is available? When they’re bundled, ideas and dreams are shut down before they can even be spoken or entertained. This could lead to community dreams getting deferred or left out over and over. When the plans start with viability, our world can only be as equitable as funders have imagined it to be. Funders are not thought leaders in equity work. We are! Viability must be a consideration but not the leading consideration.*

**Donut Economics (15 minutes)**

* We need to lead the discourse on framing viability. Economic viability cannot exist on an unviable planet and in the absence of a just social foundation.
* Donut Economics (Slide) Share [Yes! Magazine articl](https://www.yesmagazine.org/issue/ecological-civilization/2021/02/16/cities-life-affirming-economies?utm_medium=email&utm_campaign=YTW_20210312&utm_content=YTW_20210312+CID_ab1da04ae4a9064eacc4c7b4551376dd&utm_source=CM&utm_term=Read%20my%20story%20in%20the%20new%20issue%20of%20YES)e about it in the chat.
* The main tone of the climate policy and investment conversations is still a technocratic one focused on the outer ring of the donut, planetary science, and tech-based solutions to decarbonize.
  + *How do we balance the conversation with more consideration for the inside ring of the donut, the social foundation? What can we do about the gap between our social equity dreams and where public and private funders are?*
* We have to lead and encourage funders to level up on their social foundation competencies.
  + *We wanted to share 2 examples of movements leading policy and investments. 1. IEN example, notes in slide. 2. The Black Lives Matter Movement has really helped the ideas behind "decolonizing philanthropy" take off and has shifted the sense of urgency and priority.*
* Share link: <https://www.prnewswire.com/news-releases/funders-join-together-to-launch-100-million-california-black-freedom-fund-301222605.html>
* We recognize movements have challenges. Sunrise is grappling with the loss of black and lower-income members. BLM Global Foundation is grappling with funder transparency to its local members.

**In chat or discussion**

* Questions to consider
  + *What happens when movements become institutionalized? How do we get big enough to be powerful and stay relevant and trustworthy?*

**Grant Examples (15 minutes)**

* + *We still have to solve immediate problems through practical levers of system change even as we work on the longer-term levers of cultural and mindset change. Here are 3 Examples of molding climate grants to fit social equity goals.*
* Talking points in[slides](https://docs.google.com/presentation/d/1JZNHk6rwNaHD6yWMIovvLf-uSnPBN97YykUPAAta9Q8/edit?usp=sharing) (SF Dep of Environment - SF Carbon Fund).
* If time allows, engage with comments in chat or invite discussion.

#### Close (5 minutes)

**Check out (facilitators choice)**

## TIMELINE II FULL COHORT SESSION

### KEY SESSION INFORMATION

**Key Theme/Topic:** Effective Grant Writing and Management

**Estimated Time Needed:** 2 hours

**Materials Needed:**

* Presentation Slides (e.g., PowerPoint or Google Slides)

**→ Here is a** [template slide deck from PACE](https://docs.google.com/presentation/d/1JZNHk6rwNaHD6yWMIovvLf-uSnPBN97YykUPAAta9Q8/edit#slide=id.ge1295d3c42_0_395) **that you can copy, modify, and use!**

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| Technology Lead - Recording and Breakout Groups |  |
| Notetaker(s) |  |

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### FACILITATOR AGENDA

#### Convene (5 minutes)

**Welcome (3 minutes)**

* Set a welcoming tone with music and greetings.
* Share ‘as you arrive’ prompt verbally and in chat.
  + *What are you grateful for about the place you live?*
* Share some words of welcome.

**Housekeeping (2 minutes)**

* Review group agreements and reminders.
  + *Reminders of group agreements and Zoom etiquette, self-care, etc.*

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* Provide a brief overview of the session agenda.

#### Connection (10 minutes)

**Land Acknowledgement**

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**→ Rather than asking participants to provide a brief land acknowledgment as part of their introduction, we instead invited one participant to give an extended land acknowledgment for each full cohort session.**

* + *The participant shares their location, the people who stewarded it prior to colonization, their current struggles, and one earth-based practice they used/use.*

#### Compost/Compose (5 minutes)

**Embodying Power with Grace**

#### Capacity (45 minutes)

**Participatory budgeting Introduction**

* Background, democracy beyond elections
* 1-2 examples
* How communities can/must get involved in budget process
* How to steward public dollars (values, tools, models)

**Break into 3 breakout groups. The facilitator will rotate through each group every 14 minutes**

* Topic 1: [CARB - Community Connections Portal](https://www.caclimateinvestments.ca.gov/communityconnections)
* Effective Grant Writing
  + *Conduct* ***stakeholder interviews*** *to identify local climate priorities (e.g. SB 379 General Plan compliance, clean transportation options, extreme heat mitigation, stormwater infrastructure, tree canopy, etc.); Connect project idea to community priorities & local planning work; it’s easier to get follow-on funding or build on existing efforts rather than launch something new/unproven.*
  + ***Facilitating relationships*** *between city staff and CBOs, letters of support/commitment are easiest to get from people familiar with your approach.*
  + ***Researching and matching potential grants*** *to fit the entities’ needs; Capital vs. planning dollars; get to know the funders before applying.*
  + ***Attend grant orientation webinars*** *and/or participate in* ***Q&A submittal*** *periods; knowing the Grant Program Manager who can answer any questions over email.*
  + *Focus on* ***guideline reqs to make sure eligible and scoring criteria to see if would be competitive.*** *Show our* [Grant Decision Matrix](https://docs.google.com/spreadsheets/d/1wVqV8lDqP51ACcOWRqxubNcVGL-jUQ-XDaKTIOLqSRA/edit?usp=sharing) *to decide whether it’s worth the effort (abbreviated version): Helps avoid wasting time on something not competitive; E.g. SCAG grant: 30% of funds to DBE (CBOs/NGOs don’t satisfy this req); E.g. BIPOC-led, or serving underserved communities or DACs (federal EJ Screen & areas of persistent poverty vs. state definitions - CalEnviroScreen); E.g. liability insurance, compliance with fair hiring practices (having these in place → point to org policies)*
  + *Leading* ***narrative brainstorming*** *sessions; show how will it improve quality of life and equity; multi-benefit.*
  + *Creating* ***ArcGIS maps*** *that visually integrate data sources, such as CalEnviroScreen 3.0, Cal-Adapt, and Healthy Places Index into the narrative of the grant proposal;*
  + *Draft* ***work plan / Gantt chart*** *for showing deliverables timeline; funder often supplies template; show near-term and longer-term deliverables; don’t leave it all to the end; deliverables are often linked with milestones that release payment (Need to turn in a report, or just show hourly timesheets?)*
  + *Draft* ***project budget;*** *Using project roles or job titles rather than names of people (for more junior staff) allows for flexibility / less admin later on; showing leveraged funds make a project more attractive to funders.*
  + *Organizing* ***check-ins/calls*** *to stay on top of the grant deadline and coordinate materials needed.*
* Collaborative Grant Writing and Management
  + *Why collaborative grant writing?*
  + *CRC UHI project example of collaborative conceptualization and grant development to implementation*
  + *Collaborative Grant Writing: Foundational Steps: Visioning, Teaming, Scoping, Coordinating.*
  + *Templates (screenshare):* [Template Planning Document](https://docs.google.com/document/d/1T6iE5tdAZKDY5M0jGbISmskc_BTtME_WJLxJhOhD59k/edit?usp=sharing)*,* [Narrative Section Template](https://docs.google.com/document/d/121cBpiCmSUyk9ctFA6SDVd-T8wG9MuT_wPQislf7YTM/edit?usp=sharing)*,* [Template Work Plan / Budget / Schedule](https://docs.google.com/spreadsheets/d/1WnQtz_scpkqAHKn45WGUDFj14Zs_bMezhSNClysLKVI/edit?usp=sharing)
  + *Collaborative Grant Management: Tips & Tricks*

#### Close (10 minutes)

**Summary**

* Quickly go over a summary of the session using the slides.
  + *Share roadmap slide*
* Announcements and updates

**Check Out**

* Share check out prompt in Chat, Mentimeter, GoogleJamboard sticky notes, or go around the Zoom Room.
  + *What would be your ideal way that government funds are allocated and spent in the future?*