

SOCIALIZE YOUR INNOVATION



How to
create and
deploy a
socialization
plan.



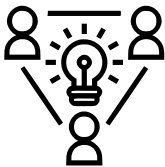
INTRODUCTION TO SOCIALIZATION

WHAT IS SOCIALIZATION?

Socialization is the process of transferring knowledge to prospective collaborators, partners, and gatekeepers in the public sector. It seeks to educate those with influence and to engage them in thoughtful participation in advancing your company's mission and goals.



Socialization requires an understanding of what is important to your socialization targets. In other words, how are you offering an opportunity to help your socialization partner meet their own goals and objectives?



It's always personal. It's about creating a relationship between you and those in the position to assist you in achieving your mission.



Socialization is most effective in one-on-one meetings, though opportunities also abound in workshops, debriefings, and agency planning presentations.



Socialization helps to establish your company as a reputable project partner and/or industry leader.



Agencies and policymakers routinely turn to industry leaders to better understand policy, regulation, and how to shape and target funding objectives.



Elected officials and NGOs will often provide letters of support, commitments of cash and in-kind resources, and opportunities for collaboration.



WHY IS IT IMPORTANT?

You never want the first time a public agency hears about you to be when they review your application. Socialization is a key component of pre-capture that allows your innovation to gain a competitive edge when it comes time to secure public funds. It is also a relationship-building exercise to gain support and/or resources for your innovation and gain critical feedback to improve and advance further.

Specifically, raising awareness about your innovation among elected officials allows them to learn about your innovation and have it in mind when they go to advocate for policy and budgets. Elected officials are also often great sources of letters of support. Additionally, socializing among public agencies allows them to have your innovation in mind when crafting funding programs and solicitations.

HOW DOES IT WORK?



IDENTIFY YOUR TARGETS

Identify which agencies and organizations best align with your company's goals and/or technology. These will be your socialization targets.



ELECTED OFFICIALS

- Governor's Office
- State Senate
- State Assembly
- County Supervisor
- Mayor
- Member of Congress



PUBLIC AGENCIES

- California Energy Commission
- California Air Resources Board
- CalRecycle
- State Water Resources Control Board
- California Department of Food and Agriculture
- California State Treasurer's Office
- Governor's Office of Business & Economic Development

Elected officials and public agencies serve the public and are wired at the DNA level to accommodate you. First and foremost, they are customer service agencies and will be highly receptive to your requests to meet. Although federal agencies are relevant, it is much easier to navigate, develop relationships, and compete for funding within a state-focused agency landscape.

LOOK UP YOUR CALIFORNIA REPRESENTATIVES [HERE](#)





TRADE ASSOCIATIONS & SECTOR-NGOS

- California Energy Storage Alliance
- CALSTART
- Electric Vehicle Charging Association
- California Agricultural Energy Consumers Association
- Californians Against Waste
- Bioenergy Association of California



COMMUNITY ORGANIZATIONS

- County Workforce Development Agency
- Disabled Veteran Business Organization
- Economic Development Agency
- Social and Environmental Justice Organizations
- GRID Alternatives

Trade associations, sector-NGOs, and communities are important stakeholders to engage with and can be powerful allies and/or project partners. For these stakeholders, have a clear understanding of how you and your innovation relate to their constituents and how your innovation will provide real benefits and minimize/avoid potential negative impacts. Is your company or project located in or near a qualified disadvantaged community (DAC)?

LOOK UP CALIFORNIA QUALIFIED DISADVANTAGED COMMUNITIES VIA [CALIFORNIA EPA'S CALENVIROSCREEN TOOL](#)



PREPARE YOUR MATERIALS

DEMONSTRATE SYNERGY

Know your socialization targets and speak their language. Prep a pitch deck that focuses on how your approach solves problems that your socialization target understands, such as environmental mandates, job creation, economic activity, engagement of DACs/low-income communities, etc. It is important that your project's goals are in alignment with their goals. Describe the importance of the innovation in helping the state meet energy goals.

LEAVE A CALL TO ACTION

Be transparent about what they can do to support your innovation. A letter of commitment, an introduction to a workforce or economic development agency, eligibility in the next funding round, etc.

Remember, socialization is a relationship-building initiative. Keep in touch.

BONUS RESOURCES

- Register your business for relevant designation statuses (Small Business, Disabled Veteran Business Enterprise, Women-Owned Business, Minority Serving Institution, etc.)
- [Federal R&D Tax Credit](#): Qualified Small Business Payroll Tax Credit for Increasing Research Activities
- [GO-Biz California Competes Tax Credit](#): income tax credit available to businesses that want to locate in California or stay and grow in California
- [California State Treasure CAEATFA Program](#): financing for California's industries, assisting in reducing the state's greenhouse gas emissions by increasing the development and deployment of renewable energy sources, energy efficiency, and advanced transportation and manufacturing technologies to reduce air pollution, conserve energy, and promote economic development and jobs.



COMMON PUBLIC AGENCIES



Primary Objectives:

- Serve as CA's primary energy policy and planning agency
- Regulatory monitoring and enforcement on utility companies
- Fulfill SB 100 and SB 350 and lead CA to 100% clean energy future
- Provide benefits to ratepayers



Primary Objectives:

- Identify, monitor, control, and reduce air pollutants
- Maintain and set air quality and emissions standards
- Lead agency for climate change programs
- CARB is part of a 3-tiered approach to reducing air pollution

Federal



US EPA

Regulates stationary, area, and mobile sources including interstate transportation



Trains



Ships



Planes

State



CARB

Regulates mobile and area sources of air pollution



Cars



Trucks



Buses

Local



Local Air Districts

Regulates stationary and area sources of air pollution



Factories



Refineries



Residential woodstoves



Primary Objectives:

- The Office of Business and Economic Development (GO-Biz)
- Leading state agency for job growth, economic development, and business assistance
- Consultation services

COMMON PUBLIC AGENCIES



CAEATFA Primary Objectives:

- The California Alternative Energy and Advanced Transportation Funding Authority (CAEATFA) is a program under the Office of the State Treasurer
- Provides innovative financing to CA industries to increase renewable energy, energy efficiency, and advanced transportation manufacturing technologies
- Top 2 priorities: (1) reduce GHGs and air pollution, (2) promote economic development and jobs

CPCFA Primary Objectives:

- The California Pollution Control Financing Authority is a program under the Office of the State Treasurer
- Provide low-cost financing to California businesses
- Assist regulated entities and other stakeholders with achieving access to private capital
- Uses tax-exempt private activity bonds to facilitate low-cost financing to qualified projects that control pollution and provide other environmental benefits.

Primary Objectives:

- Promote a healthy climate for jobs
- Contribute to a strong economy
- Improve the quality of life in California communities
- IBank's current programs include the Infrastructure State Revolving Fund (ISRF) Loan Program, California Lending for Energy and Environmental Needs (CLEEN) Center, the Climate Catalyst Revolving Loan fund, Small Business Finance Center and the Bond Financing Program.



COMMON PUBLIC AGENCIES



Primary Objectives:

- Develop a less polluting and more reliable and affordable energy systems for all New Yorkers
- Reduce GHG emissions
- Accelerate economic growth
- Reduce customer energy bills
- NYSDERDA partners with stakeholders that:
 - Attract private sector capital investment needed to expand NY clean energy economy
 - Overcome barriers to using clean energy at a large-scale in NY
 - Enable NY's communities and residents to benefit from energy efficiency and renewable energy.



Primary Objectives:

- Ensure America's security and prosperity by addressing energy, environmental, and nuclear challenges through RD&D
- Priorities: combat climate change, create clean energy union jobs, deliver energy justice
- Testing and energy facilities
- Oversees 17 National Labs and Tech Centers

Primary Objectives:

- The overarching goal is to improve America's economic competitiveness.
- 5 Strategic Goals:
 - Drive US innovation and global competitiveness
 - Foster inclusive capitalism and equitable economic growth
 - Address the Climate Crisis through mitigation, adaptation, and resilience efforts
 - Expand opportunity and discovery through data
 - Provide 21st Century service with 21st Century capabilities



COMMON PUBLIC AGENCIES



Primary Objectives:

- Deter war and ensure the nation's security
- 5 Lines of Effort (LOEs) that reflect DOD's adaptation and resilience efforts:
 - Climate-informed decision-making
 - Train and equip a climate-ready force
 - Resilient built and natural infrastructure
 - Supply chain resilience and innovation
 - Enhance adaptation and resilience through collaboration



Primary Objectives:

- Supports basic research in all fields of fundamental science and engineering, except medical sciences
- Promote the progress of science
- Advance national health, prosperity, and welfare
- Secure national defense



MOMENTUM