

Energy Equity Is Not Just a Buzzword: A Novel Energy Equity Program Evaluation Methodology

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ABSTRACT

Equity has become a buzzword in the energy industry. Much of the industry is aware of the burdens the energy system imbues upon frontline communities. However, our processes have long hinged on creating equal access (Cosgrove 2022), or the same level of support or resources for all individuals, rather than equitable access. An equity-centered approach allocates resources differently to different groups to help remove barriers to participation that impede groups who have been least able to participate (Kinstedt, Beaton, and Capps 2022). Energy equity centers the voices of frontline communities in energy planning and decision-making and ensures the fair distribution of clean energy benefits and ownership (Energy Equity Project 2022). Thus, evaluators cannot fully understand why programs have failed to reach certain communities until they bring the community they have failed to reach into the research team as partners, not research subjects.

To design programs for equity, utilities and evaluators need to have a purposeful commitment to and financial investment in community priorities, equally value the expertise and experiences of community members as researchers and conveyors of knowledge, and leverage different research methodologies. This paper presents case studies of equitable evaluation practices from other industries, envisions a future utility where structures and programs are co-designed with community, and a program evaluation framework built on a foundation of targeted universalism. The evaluation framework includes specific actions evaluators can immediately implement to begin to transform their research methodologies, improve outcomes, and continue to give utilities and regulators the insights they need.

Introduction

Evaluation, measurement, and verification (EM&V) are practices to assess the performance of energy programs and projects. Utilities, regulatory commissions, and other oversight bodies rely on evaluation results to ensure that money is spent prudently, programs have met their goals, benefits are accurately attributed, and programs are cost-effective (ACEEE n.d.). EM&V methodologies are long standing, highly studied, and widely accepted. Yet evaluation orthodoxies are routines reinforced by professional norms in a field that is now, and long has been, majority white—and these orthodoxies do not reflect the diversity of perspectives in our communities (Dean-Coffey 2019). To evaluate our impacts on all people, we must reimagine our understanding of evaluation as a discipline.

To do so we must first understand the historical foundations of the utility and energy efficiency. Fundamentally, utilities are obligated to provide reliable power to all customers. As demand increased, demand-side management (DSM) emerged as a least-cost alternative designed to delay or prevent the construction of new power plants. In this context, total energy saved was the metric of success—who saved energy or when savings occurred was not important. It was widely accepted that all customers, whether they participated in energy efficiency programs or not, benefited from energy efficiency programs. Since then, the industry has sought to ensure that energy efficiency benefits flowed proportionally across customer classes, guided by the split between residential and commercial customers

based on revenue contribution. Then, the energy efficiency industry recognized that not everyone has benefited from energy efficiency, which gave rise to more targeted programs, such as programs for people with low to moderate incomes. Technological advances such as distributed energy resources and more complex grid constraints have resulted in a deeper interest in where and when energy savings occur. Now there is growing recognition that traditional energy efficiency programs may not meet the future needs of a utility that has an obligation to provide reliable power to all customers and an interest in doing so equitably.

As utilities consider this transformation, they will also need to re-examine the policies, practices, and frameworks used in evaluation. Equitable evaluation should assess energy savings and cost-effectiveness in relation to their impact on communities. To that end, our framework for equity-focused evaluation centers three foundational shifts:

- Community should be engaged meaningfully, which often means building relationships first instead of only engaging them within a research activity,
- Using historical participation to revisit attribution, and
- Evolving evaluations from a systems-centric approach, which measures quantitative utility-centered metrics such as kWh saved, to a people-centric approach, which blends quantitative and qualitative metrics to tell a story of impact on communities.

We first introduce fundamental concepts related to equity, such as self-determination and targeted universalism. We then detail case studies of equitable evaluation frameworks used in other industries and discuss how elements of each could be adapted and used in energy efficiency. Next, we discuss the three foundational shifts introduced in the bullets above and then introduce an action-oriented framework applied across the stages of evaluation. Understanding that systems change takes time—often generations—we close with a vision for a future state where utility goals, success, program design, and program evaluations are co-created with the communities they serve.

Equity and Targeted Universalism

The first two panels of Figure 1 show a well-known illustration of equality and equity. They show people of different heights trying to watch a baseball game over a fence. **Equality** gives everyone the same number of boxes to stand on, while **equity** adjusts the number of boxes so each person can see over the fence equally well. However, this framing suggests that the problem lies in individual differences, such as height, rather than the structure (the fence) blocking their view. It also fails to address the sustainability of the solution - if the people return the boxes or the boxes are removed, not everyone can see again.

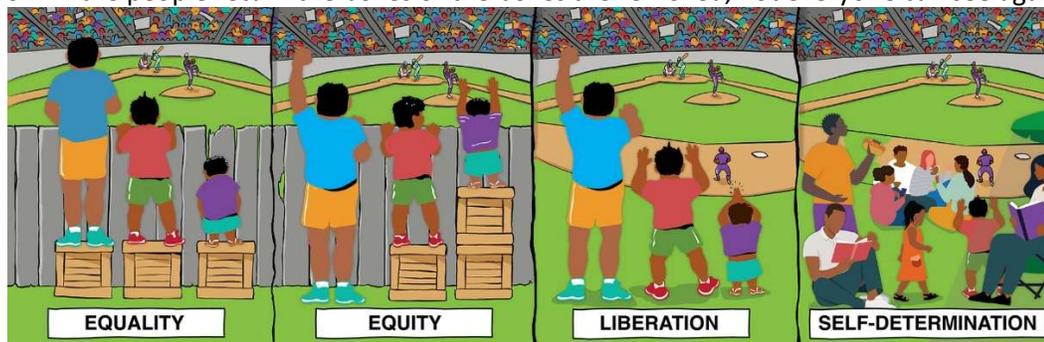


Figure 1. The 4th Box. Source: A collaboration between [Center for Story-based Strategy](#) & [Interaction Institute for Social Change](#).

Social justice advocates have extended this graphic by adding a third panel that depicts **liberation**, in which the fence is removed entirely. While liberation may appear to solve the issue by permanently

eliminating the barrier, it still assumes that everyone wants the same outcome: to watch the baseball game. In reality, one person might prefer to socialize in the stands, while another might want to relax in the shade with a book. We believe that equity is the tool to help communities achieve **self-determination**, which is the right of individuals and communities to freely determine their own political, social, and economic futures without external coercion (Danspeckgruber and Gardner 2025). To achieve this ambitious goal will require new approaches, such as targeted universalism.

Colloquially described as “equity 2.0,” targeted universalism makes an unwavering commitment to bring everyone toward a co-created¹ universal goal that has been developed with consideration of the things all people would like for themselves and their communities. *All people live in homes that are energy efficient, safe, and comfortable by their standards* is an example of a universal goal. Targeting comes into play through the development of pathways to achieve this goal for different groups based on their needs, wants, and positionality in relation to the goal. Every group, regardless of their proximity to the goal, should be able to access some type of support to achieve the universal goal. For some groups this might be funding, for others it might be education, for others it might be something different still. The primary difference between equity and targeted universalism is that targeted universalism focuses on improving the baseline for everyone, while equity focuses on closing gaps between the highest and lowest performing groups (powell, Menendian, and Ake 2017).

Case Studies Across Industries

This section presents three case studies—the Colorado Health Foundation (CHF), the Egyptian Community Schools Project (CSP), and “Building the Sacred”—that collectively illustrate diverse approaches to evaluation in practice outside of the energy sector. While the cases emerge from distinct sociocultural and institutional contexts, they share a commitment to centering the voices, values, and lived experiences of historically marginalized communities. These case studies were selected not only for their geographic and methodological diversity but also for the ways in which they challenge dominant paradigms of evaluation. They demonstrate how evaluation can be reimaged as a tool for justice, healing, and transformation when it is grounded in community-defined priorities, cultural knowledge systems, and relational accountability.

Case One: Colorado Health Foundation

The Colorado Health Foundation is a statewide philanthropic organization that advocates for and invests in solutions and policies that drive health equity and racial justice. Between 2008 and 2018, Colorado Health Foundation (CHF) underwent profound transformation. It expanded its grantmaking from \$26 to \$86 million, shifted from a public charity to a private foundation, and cycled through multiple strategic overhauls and leadership changes (Parker 2019). Amid this turbulence, the foundation built a research and evaluation department from scratch—an effort that would reflect and shape the foundation’s evolving identity. Initially, CHF’s evaluation model was rooted in “measurable results,” or a set of standardized output metrics designed to demonstrate reach and efficiency. Their simplified performance measurement framework used quantitative output indicators to track grantee reach (e.g., number of people served). **This model reduced burden on grantees and was externally celebrated, but internally it failed to answer deeper questions about impact, strategy, and systems change.** To remedy

¹ While the ideal version of co-creation involves members of all communities coming together to share power and achieve consensus, this is not always feasible in reality. Utilities can begin to co-create by first ensuring their goals reflect their own needs as well as the needs of the community. For example, transforming a goal from “develop programs to ensure no new power plants need to be constructed” to “develop programs that help all communities access clean affordable energy” is a positive step toward co-creation.

this, CHF introduced short-cycle studies and embedded external evaluations to answer complex strategic questions, support learning, and validate or challenge assumptions. As the foundation’s ambitions grew, so did the need for a more robust, learning-oriented evaluation function.

Leadership introduced theories of change and emergent learning practices, aiming to embed evaluative thinking into strategy development. [Theories of change](#) is a method for describing and illustrating how what a program does (its activities) leads to desired goals. [Emergent learning practices](#) is a set of principles and practices to help people across a system think, learn, and adapt together in a way that helps them achieve the goals to which they aspire. However, these efforts clashed with a culture that prized certainty, speed, and perfection. Program staff, unaccustomed to strategic design, viewed evaluation as burdensome or critical rather than collaborative. The foundation’s internal culture was further disrupted by a staff survey revealing deep dissatisfaction, especially around hierarchy, inclusion, and psychological safety. This prompted leadership changes, a reframing from “theories of change” to “a learning evaluation”, and a renewed focus on equity. Program officers were reoriented as community-engaged strategists, and evaluation was repositioned as a partner in learning and systems change.

External evaluators found it difficult to adjust to CHF’s rapid evolution and shifting priorities, partly due to limited communication and unclear expectations. Internally, the evaluation team grappled with how to support adaptive strategy², integrate equity, and remain relevant amidst constant change. The evaluation team began to ask how their work could serve communities, not just the foundation. Some staff raised concerns that theories of change were developed internally without enough community input, so they pushed for “double-loop” learning, asking not just whether strategies worked, but whether they were the right strategies in the first place (Parker 2019). They wrestled with how to share power with grantees, avoid turning equity into a checklist, and ensure that evaluation was meaningful to those most impacted. After ten years, CHF is continuing to evolve their evaluation methodologies to be responsive to changes in the foundation, which is documented in a detailed roadmap (Parker 2010, p. 40).

Energy efficiency evaluators can learn from CHF’s evaluation journey. The foundation showed that evaluation must be responsive to decision-making timelines. Short-cycle, use-oriented studies that directly inform upcoming program or investment decisions helped build credibility and engagement and helped them shift from measuring quantitative outputs towards measuring impact and systems change. For utilities, evaluations should align with key planning cycles—like rate cases or integrated resource planning—ensuring findings are timely, actionable, and relevant. Successful learning at CPF came when the role of evaluation was expanded and external evaluators became intimately involved in strategy as opposed to strictly objective data analysts seeking a perfect quantitative result. Altogether, these lessons encourage a shift from transactional, retrospective evaluations to a culture of continuous, forward-looking learning that supports smarter energy investments and greater public benefit.

Case Two: Egyptian Community Schools Project

The Community Schools Project (CSP) in Egypt, launched in 1992, achieved remarkable progress in expanding access to quality education for children, particularly girls, in remote, underserved areas. By establishing 227 schools across Upper Egypt, the project significantly increased enrollment and retention rates, with nearly 90% (up from 81%-85%) of students completing primary education (grades 1-6) and most transitioning to preparatory school (grades 7-9) (Szucs and Hassan-Wassef 2010). CSP was implemented in partnership with the Ministry of Education (MOE), UNICEF, non-governmental organizations (NGOs), local communities, and other partners, and evolved through five phases and almost two decades. Early phases developed foundational pedagogical strategies (e.g., literacy, numeracy, basic

² Drawing on complexity theory and the work of Henry Mintzberg, adaptive strategy emphasizes learning by doing, abandoning what doesn’t work, and incorporating unexpected insights to remain relevant and effective in dynamic environments

science, and social studies), recruited facilitators from local communities, and tested the feasibility of the model in a small number of schools. The expansion phases solidified partnerships, introduced child-centered active learning, life skill education, and multi-grade teaching. This allowed the CSP to diffuse the model into mainstream education with community engagement in school governance. The last phase, or the sustainability phase, strengthened the model to ensure long-term integration into national systems.

Despite these successes, the CSP faced several implementation challenges, one of which was the sustainability of the model, as local NGOs and the MOE lacked the capacity and resources to fully absorb and maintain the schools. Resource inefficiencies emerged, with some schools having surplus materials while others lacked basic infrastructure. To combat this, CSP leveraged local capacity instead of expensive infrastructure. Community members contributed classroom spaces, built furniture, recruited facilitators, and formed education committees. Many facilitators had only secondary education but were trained and supported intensively. Since communities “owned” the program, overhead costs were reduced.

Evaluation and monitoring for the CSP went beyond narrowly focusing on financial returns (e.g., cost per student) to focus on who was reached, how they progressed, and how communities adapted while accounting for regional variation and evolving needs. The mixed method evaluation examined equity in access, quality, learning outcomes, sustainability, and community participation, which highlighted systemic issues such as MOE capacity, NGO limitations, and resource dependency. The evaluation, however, did not fully explore how education systems reproduce or challenge inequity and instead focused more on program performance than on interrogating structural inequities (e.g., why girls remain underrepresented, or why rural children are not being reached). There was limited analysis of how CSP could influence broader education policy to dismantle systemic barriers.

Like CSP, the energy efficiency industry also has limited resources and can learn from CSP’s approach of leveraging local capacity instead of expensive infrastructure. Overall, the CSP evaluation model also suggests that evaluations that are local, participatory, equity-driven, and geared toward long-term learning and ownership are effective. These principles can help energy efficiency evaluators better measure what matters—and deliver more meaningful outcomes for the people they aim to serve.

Case Three: Indigenous Evaluation Framework for Programs Serving Native Survivors of Violence

“Building the Sacred” is a culturally grounded Indigenous evaluation framework developed by the Urban Indian Health Institute (UIHI) in collaboration with Indigenous women leaders who have collectively spent over 135 years serving Native survivors of violence (Polansky and Echo-Hawk 2021). This framework emerges from a deep recognition that conventional evaluation methods, often imposed by state and federal funders, fail to capture the relational, spiritual, and communal dimensions of healing and violence prevention in Native communities. Instead, conventional methods can cause harm by forcing programs to quantify success in ways that erase stories, ignore cultural protocols, and reduce survivors to data points.

“Building the Sacred” reimagines evaluation in a way that honors the knowledge systems, priorities, and healing journeys of communities who have been excluded in the past. The framework offers four interrelated practices: walking with relatives (creation of safe, trusting relationships), planting seeds (focusing on small, meaningful changes) of strength, healing (honors the need for culturally attuned spaces where grief and trauma can be held with care), and adapting in community (recognizes the importance of flexibility and responsiveness in programs that serve Native survivors of violence). These practices reflect Indigenous values of relationality, reciprocity, and sovereignty. Survivors were included in the evaluation, and the evaluation included indicators like state of confidence, safety, or connectedness; how many goals were self-defined and worked toward; and changes in the ability to care for others in the community.

The framework provides practical guidance for developing evaluation through culturally respectful methods such as:

- Talking circles - structured group dialogues, often used in support or community settings, where

participants share stories and learn from one another in a respectful, relational way. These circles are typically facilitated by trained Indigenous leaders who ensure that the space upholds values such as consent, privacy, confidentiality, trust, cultural safety, engagement, reciprocity, and relational connection. The goal is to foster open, honest, and culturally grounded communication.

- Art/music/dance/poetry- using creative expression as a way to communicate personal and cultural values, reflect on experiences, and share the impact of programs. This approach allows individuals and communities to feel seen, express meaning beyond words, and engage in dialogue. It can spark reflection, surface new insights, and reveal areas for further evaluation.
- Dreams– recognition of dreams as valid and trusted sources of insight as well as meaningful tools for exploring knowledge, guiding inquiry, and surfacing themes or questions that can be further examined with community input. It honors spiritual ways of knowing as integral to understanding impact and shaping evaluation processes.
- One-on-one conversations – also known as conversational interviews, are a method for gathering evaluation stories through intimate, relational dialogue guided by culturally and trauma-informed approaches and facilitated by Indigenous or culturally attuned individuals. Facilitators are trained to uphold consent, privacy, confidentiality, trust, cultural protections, engagement, reciprocity, and relationality—creating a safe space for open, honest, and meaningful storytelling.

It also offers alternatives to traditional data collection and dissemination tools by advocating for methods such as culturally attuned surveys, visual logic models, and story mapping (additional references for more on these methods are available in (Polansky and Echo-Hawk 2021):

- Culturally attuned surveys are designed from within community values and context. As a result, they are often reviewed or co-designed with community members to ensure resonance and respect. They use open-ended questions rather than rigid Likert scales, avoid deficit-based language (e.g., replacing “no” or “disagree” with “not yet” or “I’m getting there”), and avoid triggering, invasive, or overly clinical language.
- Visual logic models “incorporate Indigenous values, imagery, and artistic expressions” to emphasize relationships, healing, and community movement (Polansky and Echo-Hawk 2021, 19).
- Story mapping is a qualitative, multimedia method that blends written, audio, or video narratives with photographs, art, community voices, and geography or place-based data to center the storyteller. This method illustrates collective memory, context and place-based meaning which is especially useful when quantitative data is scarce, unreliable, or erases lived experience.

Importantly, the framework centers Indigenous data sovereignty (i.e., the right of Native nations to govern their own data) and calls for investment in Indigenous evaluators who can carry this work forward with integrity and cultural humility. As a call to action, this framework invites evaluators, funders, and practitioners to reimagine evaluation as a sacred practice—one that uplifts Indigenous cultures, protects survivors, and supports the collective healing of Native communities. It centers Indigenous voices and practices at every stage while explicitly seeking to dismantle inequities in how programs are evaluated and how Indigenous experiences are represented. Thus, the framework is a structural intervention, challenging the norms of evaluation and advocating for Indigenous data sovereignty.

Energy efficiency evaluators could similarly utilize the concept of planting seeds – where small and meaningful changes can be used over time to create safe and trusting relationships with community. Logic models, a tool often used in energy efficiency evaluation, can be re-envisioned to show both a program’s theory and also its impact on community.

Case Study Takeaways

Taken together, these case studies underscore the transformative potential of equitable evaluation when it is rooted in cultural humility, community ownership, and structural critique. From the grassroots health equity work of CHF to the systemic educational reform efforts of the Egyptian CSP to the decolonizing practices embedded in “Building the Sacred,” each case offers a unique lens on what it means to evaluate with, rather than on, communities. They reveal that equitable evaluation is not a singular methodology but a dynamic, context-responsive practice that must be continually adapted to honor the histories, identities, and aspirations of those it seeks to serve. As such, these case studies not only inform the theory and practice of equitable evaluation but also invite evaluators, funders, and institutions to reimagine their roles in co-creating knowledge that heals, empowers, and transforms. In each case study we’ve highlighted areas where evaluators in energy-efficiency could adapt and employ these insights to be more responsive to local needs, culturally attuned, and environmentally just. These approaches surface hidden impact, foster trust, and ensure that transitions to renewable energy or energy efficiency initiatives do not replicate existing inequities. In this way, equitable evaluation becomes not only a tool for accountability but also a catalyst for inclusive innovation and sustainable transformation.

What Can We Do Now? A Framework

While Encolor inherently believes it is time for the energy efficiency industry to change the way it has always thought about customers and communities, we also recognize that there are many structural and regulatory requirements in place which inform the status quo. We recognize that for true transformation to occur, the utilities’ regulators and stakeholders must also support change, but we have focused this paper on utilities building relationships with community. Building relationships is necessary to truly co-create solutions to systemic problems with communities, and as the Egyptian CSP Case Study shows, this work takes time. As utilities work to build these relationships, there are opportunities to make incremental changes to the evaluation process to move closer to an approach that meets both utility and community needs. As Parker and Dortin (2024) argue, targeted universalism can foster good will and lay a foundation for trust between utilities and communities, but the work can stagnate if there is not also an intentional push to share power with communities and change the systems that prevent them from thriving. Thus, we propose a framework for equitable program evaluation that, like any transformational approach, intends to make itself obsolete by changing the very way we think about evaluation. We then apply the framework to the major steps in evaluation: planning, data collection, analysis, and reporting, offering a pathway for utilities to make the changes they can, and advocate for change where they can’t.

Meaningful Community Engagement

The majority of people working in the energy sector see themselves as working toward the greater good. We generally believe that all people deserve affordable, reliable energy. We’ve also heard calls to action from across our industry and others inviting us to work with communities to ensure our programs are better designed—and we have tried to listen. Nationally, many utilities are working to more actively involve communities in evaluation. This may look like including community-based organizations (CBOs) in evaluation planning or logic modeling, asking CBOs to help recruit participants, reframing evaluation questions with plain language, compensating the community for their expertise, and in some cases exploring different types of activities such as listening sessions. While these activities are a great start, they are often designed as inputs to answer research questions and rarely evaluate the program’s success from the perspective of the community. Even more rarely are communities involved in analysis or issuing recommendations, which means that they have less influence over outcomes. This can result in communities feeling as though engagement is a “check the box” activity for a utility rather than an opportunity to make meaningful change. Additionally, over-engaging communities (particularly the same

groups or people) and under-delivering solutions can deepen mistrust. If engagement doesn't align with their reality, or if community members sense that utilities will not be responsive to more immediate needs, there is a risk of damaging relationships that are critical to future work (Fedorowicz, Arena, and Burrowes 2020). It's also important to acknowledge that energy is just one of many issues communities are concerned about, and rarely is it top of their list. While co-creating evaluations with the community may be ideal, it may not fall within their priorities given the reality they operate within.

The first step a utility should take to understand what community engagement should look like in an evaluation is an internal consideration of existing relationships. How frequently do you engage a community for feedback, and how well have you closed the research loop? Where in your organization are there community engagement efforts happening? Have you or someone else in your organization already collected information that could help you address your research questions? Before collecting more information, always seek to understand what already exists.

Once a utility understands the current landscape, it's time for honest reflection: would engaging the community at this time bring value for you *and* for the community? If the answer is no or engagement would just be a "check the box" exercise, it may be more fruitful to skip engagement during this evaluation cycle and focus instead on building thoughtful relationships. This is a slow process—especially where trust is broken or did not exist in the first place—and should happen on the communities' terms. This cannot be done through one-off engagement during an evaluation cycle. By shopping at local grocery stores, walking in their lowest income neighborhoods, riding the bus, talking to community organizations, dining in family-owned restaurants, and showing up at block parties ready to listen more than talk, utilities can transition themselves to a more people-centered approach.

If community engagement is the appropriate choice for your evaluation given this context, the next phase is to design that engagement in a way that is reciprocal, flexible, and rooted in trust. For example, utilities often partner with CBOs to conduct outreach but place rigid requirements on the formats that outreach must take and the language that must be used. The power of community-driven outreach is in the authenticity of their voice and the trust they hold in their networks (Vanover, Dorton, and Moring 2022). Instead of prescribing every detail, consider shifting the dynamic: clearly communicate your goals and constraints, and then work with partners to determine how best to meet them. This not only improves the quality and reach of engagement but also shows respect for community expertise.

Transitioning From Systems-Centric to People-Centric Impact Measurement

As discussed in the CHF case study, equitable evaluation needs to move beyond static, output-focused metrics. Historically, energy efficiency program goals were quantitative, and progress was typically reported by counting the number of installed measures or services provided and the resulting energy (i.e. kilowatt hours, therms, or MMBtu) reduced (Orvis, Aggarwal, and O'Boyle 2016). Instead, we need to move towards evaluations that generate deeper insight into why programs succeed or fall short. In so doing, what we measure needs to be based on what we have defined as success, including what matters to the people who are most impacted by the program(s). Metrics have become important for operationalizing energy equity as they can influence investment and policy decisions while at the same time measuring the impact of energy programs on people and communities (Barlow, Tapio, and Tarekegne 2022). Defined as a quantitative measurement for a qualitative phenomenon that can help measure a specific equity outcome, equity metrics are essential for tracking equity-related efforts and ensuring progress toward goals is made (Preziuso, Tarekegne, and Pennell 2021).

To fully understand whether programs produced equitable pathways for all customers to experience equal outcomes requires context that can only be understood by layering qualitative and quantitative analysis. Encolor's (2025) maturity model for impact measurement (Figure 2) is a tool that utilities can use to self-assess where they sit on a journey from systems-centric output tracking to people-centered outcome evaluation. The maturity model is meant to be read from left to right. The left-hand

side of the model illustrates a common, systems-centric approach to measuring impacts. In this model, utilities often measure progress toward their goals using things that are easy to track (often outputs such as number of trainings). As utilities engage more with communities and begin to define success in community terms as well as utility terms, their approach to measuring impact will also adapt. The right-hand side illustrates a more people-centric approach, which focuses more on the outcomes—or what has been realized within a community because of utility impact. The boxes at the top of the maturity model visualize the transition from systems-to-people-centric impact measurement across five stages, and the corresponding boxes below the arrow illustrate the types of measurement activities that a utility may implement within each stage. This tool can help utilities self-assess where they fall currently, and help to chart a path to transition from systems-centric to people-centric approaches. This transition does more than just improve community relations, it helps to improve outcomes.

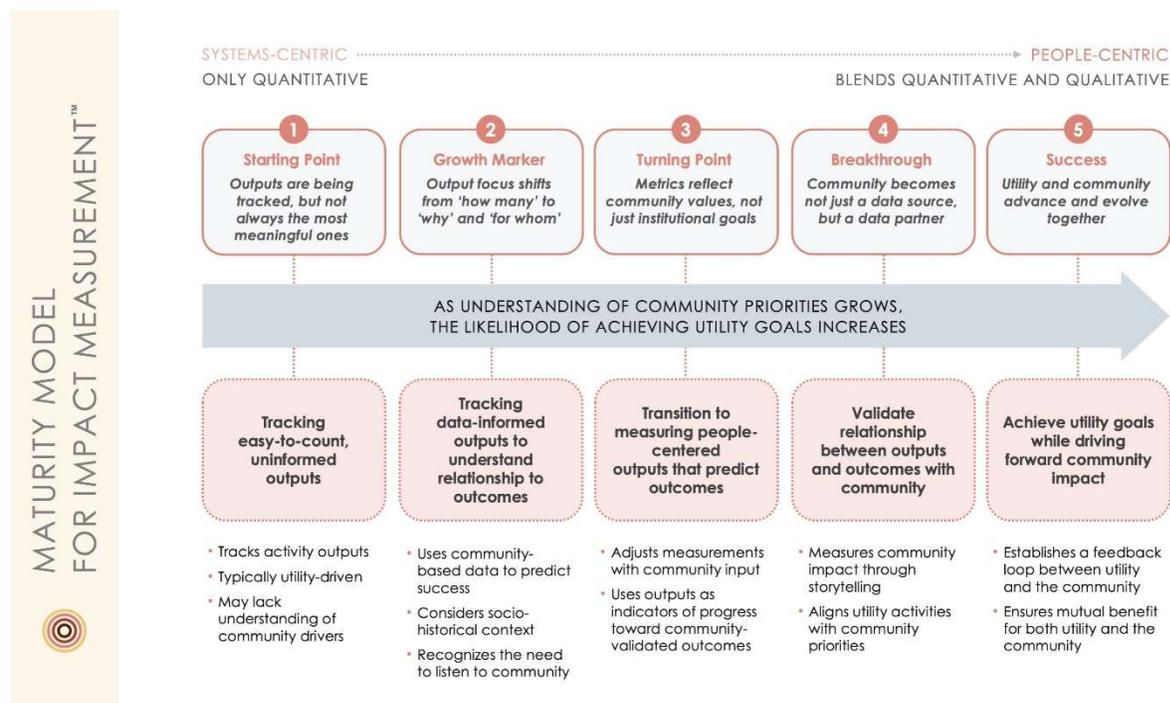


Figure 2. Maturity model for impact measurement (Encolor 2025)

When utilities move towards people-centric outcomes, the assumptions underlying the purpose of evaluation can also begin to expand and measuring impact can be reimagined. Evaluations that prioritize people-centric outcomes would go beyond measuring savings to also measure the impact of the actions towards the progress to goals. For example, if a utility begins to collect stories about the health impacts of electrification measures from its communities in addition to looking at decreases in energy burdens, they will have a more well-rounded understanding of their impact. When an elderly woman shares that she no longer needs to use an oxygen tank in her home for the first time in a decade after replacing a wood burner with a new heat pump, the utility can begin to see its impact beyond dollars and cents. This information may also be helpful in helping utilities advocate to regulatory bodies for transitions beyond the traditional measure of cost effectiveness.

An Evolved Approach to Attribution Analysis

One core function of an energy efficiency evaluation is to determine the impact the program achieved. To determine the impacts that are attributable to the program, evaluators currently

determine what would have happened in the absence of the investment, or the counterfactual, through analysis of free ridership, spillover, and market effects. Programs designed for equity are working to engage customers who have rarely or never participated in their programs. As such, there should be little to no free ridership in populations engaging with programs for the first time. If an evaluation can assume there is little to no free ridership in programs rooted in equity or targeted universalism principles, evaluators can shift from trying to produce a precise counterfactual and instead focus on understanding how the program supported participants toward achieving their goals and what program changes are needed to make the program more effective. To measure people-centric metrics, evaluators can start reframing evaluation questions toward more open-ended questions designed to tell a story about the impact of program activities on communities. For example, when exploring awareness, instead of asking “How did you first hear about the program?”, evaluators could explore “Who in your community is the program not reaching? Why do you think this is?” Questions about how important program factors were in decision making could be reframed to “what part of the program did you use to help you reach <participants’ goal>?”. Questions rating the likelihood that participants would have installed exactly the same measure would not be asked, since we are now assuming, based on historical lack of participation, there is no free ridership, we can also assume the measure would not have been installed without the program support.

Applying the Framework

Improving equity in energy efficiency evaluation requires a structured shift from awareness to action. Table 2 on the next page outlines a progression that begins with **growing equity awareness**, where evaluators and stakeholders build foundational understanding of systemic barriers and historical inequities. From this awareness, the next step—**making process changes**—translates insight into redesigned methods and practices that better reflect and serve diverse communities. Finally, **practicing targeted universalism** embeds equity into the very structure of evaluation by setting a shared goal and implementing differentiated strategies to ensure that all populations, especially those historically excluded or underserved, can achieve it. Each column builds upon the previous: awareness informs better processes, and improved processes enable intentional, equity-centered outcomes.

A Future Vision

Our goal for this framework, like any transformational effort, is for it to one day become obsolete because the system it has been designed within has been changed. If our goal is for communities to achieve self-determination in energy (Figure 1)—and we recognize that transformational efforts such as these often take generations—we need a collective vision to work toward. Figure 3 (pg. 12) illustrates what a mutually beneficial relationship might look like between a utility and the communities it serves in the future. In this vision, which is built on the foundation of targeted universalism, the utility sees itself as a purveyor of a public service that is one of many public institutions working in conversation with one another to elevate all people closer to a universal goal. Utility goals are set at the enterprise level, respond to broader societal needs, and are co-created with the people the utility serves. Utilities are partners in overcoming broad systemic barriers, such as poverty and the housing crisis, because overcoming them is central to delivering on the utility’s public mission. Organizations working in healthcare, education, social services, and other human-centered sectors are not seen as intermediaries in utility outreach, but as critical partners in advancing toward a collective, shared vision for the future. Evaluation is a tool to understand how well the utility has supported progress toward that shared vision and is used to inform the collective decisions regarding utility operations that are made with communities, not for them.

Table 2. Equity and Targeted Universalism in Evaluation Practices

	Growing Equity Awareness	Making Process Changes to Improve Evaluation Equity	Practicing Targeted Universalism
Planning	<p>Evaluation objectives include “why” and “for whom” and consider how communities would evaluate success.</p> <p>Understand if previous data collection approaches have successfully reached all communities.</p> <p>Community supports engagement efforts.</p>	<p>Evaluation objectives reflect the needs of the utility, evaluation, and communities.</p> <p>Scope different activities to reach those previous activities have not; ride-alongs, charettes, story mapping, learning circles, or photo/video storytelling.</p> <p>Include enough budget and timeline engage the community beyond recruitment.</p>	<p>Evaluation objectives are co-created with the community.</p> <p>Evaluators review disaggregated data about the communities they serve to understand how they are situated in relation to the goal the program hopes to achieve.</p> <p>Evaluators work with community representatives to establish research questions that meet community and utility needs.</p>
Data Collection	<p>Instruments remove industry jargon and use language relevant to the community.</p> <p>Understand the limitations in current approaches that prioritize certain populations over others.</p>	<p>Include questions on instruments that move past establishing counterfactuals and instead describe impact on community.</p> <p>Consider applying different attribution ratios based on historical participation.</p> <p>Trusted community members assist with data collection.</p>	<p>Data collection strategies address population-specific barriers (e.g., disability access, immigration status concerns, digital exclusion).</p> <p>Use culturally relevant tools and affirm dignity and agency in how questions are asked.</p> <p>Incorporate community-owned or participatory data models.</p>
Analysis	<p>Validate findings with those closest to the outcomes. Explore how evaluation methods and metrics may have overlooked community-defined success.</p>	<p>Combine qualitative and quantitative insights to sharpen equity conclusions.</p> <p>Bring community perspectives into the interpretation of results through participatory analysis methods when feasible.</p>	<p>Co-analyze results with community partners to surface hidden trends, root causes, and lived experience.</p> <p>Use collaborative sensemaking approaches to understand systemic barriers. Translate findings into strategies co-developed with impacted populations.</p>
Reporting	<p>Understand whose interests are centered in final reports and presentations.</p> <p>Evaluation results are shared back to participants with consideration for how tone, language, and dissemination channels may reinforce existing inequities.</p>	<p>Prior to finalizing reporting, outputs are validated with community input.</p> <p>Share results in multiple accessible formats: community briefs, visual dashboards, videos, or infographics.</p> <p>Include recommendations from community voices where possible. Provide forums for feedback and follow-up dialogue.</p>	<p>Outputs and recommendations are co-created with community to help advance progress toward a universal outcome.</p> <p>Offer actionable, equity-centered recommendations that advance progress toward a universal outcome.</p> <p>Findings inform policy, programs, and reinvestment in the community.</p>

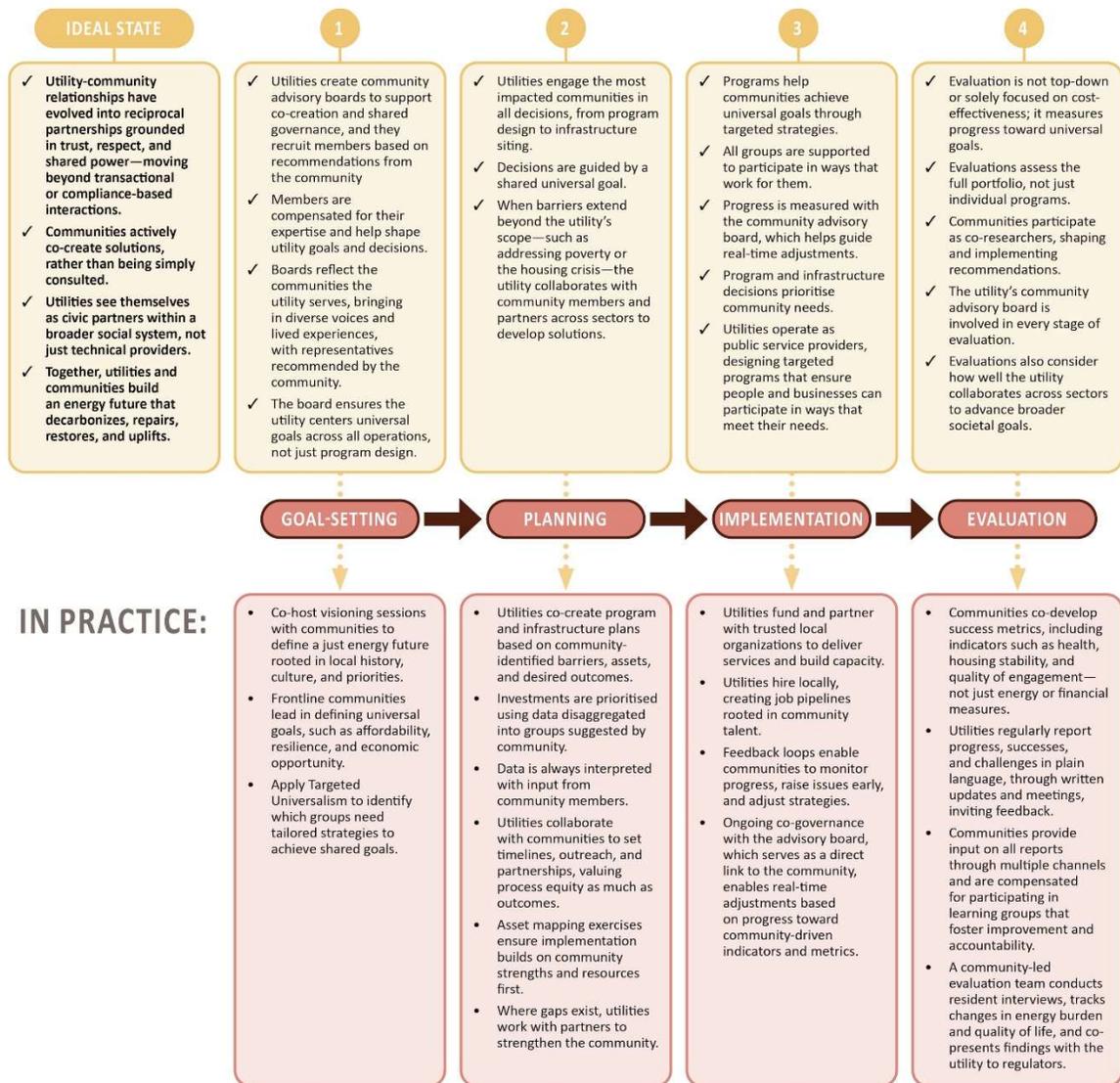


Figure 3. Vision of a transformed relationship between utilities and communities.

Conclusion

As we've shown through the case studies, framework, and vision for the future, equitable evaluation is more than a technical exercise; it is a vital practice that shapes how utilities understand and serve their communities. By embedding equity into every step of evaluation, we shift the focus from simply measuring outcomes to fostering genuine partnership, accountability, and empowerment. This work challenges long-standing norms and invites evaluators and utilities to re-think representation and how success is defined. While the path toward equity is complex and ongoing, advancing equitable evaluation today lays the groundwork for more inclusive decision-making and ultimately, a more just energy system. Equitable evaluation is a key lever for transforming energy programs into tools that truly uplift all communities.

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