Immeasurable Impact? Creating Success Frameworks for Long-Term Equity Interventions

Leigh Michael, ILLUME, An E Source Company, Seattle, WA

ABSTRACT

Priority populations have the most to gain and lose in the clean energy transition, making equitable program design essential. Utilities must connect with these communities to build awareness, understand barriers, and design appropriate solutions. However, traditional decision-making tools like benefit-cost analyses fail to capture equity-centered impacts, requiring innovative approaches to conceptualize and measure program success.

We examine how a Pacific Northwest utility developed a KPI framework for a clean energy education program focused on building knowledge rather than customer acquisition among priority populations. This experience revealed unique challenges and opportunities for reimagining program impact measurement.

Based on this work, we provide strategies to develop equity-focused metrics:

- Embrace the mess: Metrics development requires iteration and revision, departing from the industry's emphasis on efficiency and "getting it right the first time."
- Rethink traditional program logic models: Equity-centered programs need frameworks capturing holistic community benefits and long-term, indirect impacts rather than simple acquisition metrics.
- Enable cross-utility coordination: Complex equity-based metrics require broader integration across utility teams. We conducted eight cross-team workshops to develop a meaningful and useful metrics framework.
- Ensure programs reflect communities served: Traditional EM&V frameworks risk creating programs that meet conventional goals but miss their equity-focused intent. We need approaches that accurately measure equity program impacts while aligning with existing industry systems.

This paper provides concrete strategies for defining and measuring impact in equity-focused programs, enabling utilities to develop methodologically sound metrics that advance equitable clean energy transitions.

A note on terminology: In this paper, we broadly refer to “priority populations” to describe customers who have faced persistent barriers to clean energy benefits and/or have been disproportionately impacted by energy systems.

Introduction

Energy programs focused on equity may have unique designs and operational goals, but they all share three common principles: **listening** to, **engaging** with, and **benefiting** the customers they serve. These three words sound simple, but each is complex to execute well – and success in one area depends upon success in the other two. This creates challenges for program administrators. Because these programs need to understand community needs and build meaningful relationships with priority populations *before* implementation can be effective, equity-focused programs will not achieve their intended goals right away. They typically take longer to achieve their intended impact compared to traditional energy efficiency programs, which usually deliver results within 2-3 years. How, for example, can a utility create opportunities to meaningfully listen to and learn from their most vulnerable populations where earned trust does not exist – and where there is a limited demonstrated history of

positive impact with those communities? How can those utilities engage customers without first understanding their nuanced priority needs – and their persistent barriers to meaningful participation? Critically, how can programs make a positive impact without addressing the fundamental needs of customers who have perpetually not engaged with or benefitted from energy services? There is a circular relationship among listening, engaging, and benefiting – and it creates a complex implementation challenge that can overwhelm program planners, administrators, and evaluators alike.

There is another side of the coin. Entities can adopt systematic processes to thoughtfully design equity programs – and assess whether they are achieving their intended goals and outcomes. In this paper, we outline a process that leverages, retunes, and unifies the common building blocks of program design and evaluation that have been codified over decades within the industry. Rather than creating a completely new framework, we recommend building on – and adapting – these methodologies that have been long-adopted and leveraged within energy efficiency. This paper focuses on how we can fine-tune these processes to address the unique considerations, critical stakeholder input, and measurement challenges that define equity-focused programs. This renewed approach creates a practical roadmap for utilities to advance more effective and accountable equity program design and implementation.

Playing the Long Game: Understanding the Current State

Before delving into this paper, it is important to acknowledge that programs that seek to advance equity are 'playing a long game.' Systemic issues that have created the current state – where vulnerable customers persistently lack access to services, and where utilities struggle to engage those customers – will take time to overcome. This is due to several factors, namely:

Structural barriers take time to address: Initiatives that seek to advance equity are working to overcome decades of systemic inequity and disinvestment. This has cascading impacts. As two separate but significant examples, customers with limited access to capital or enclosed social networks have big-picture barriers that make program engagement difficult.

Trust is hard-earned: There are deep historic contexts underpinning "why" customers or communities have persistently not benefited from interventions. This is often due to a breakdown of earned trust between utilities and the customers they serve. This trust cannot be earned back overnight. It takes time – often years – to demonstrate genuine commitment and rebuild the foundation to enable meaningful partnership.

Customer realities do not have easy fixes: Vulnerable customers face a multitude of everyday realities that make energy services – be it energy efficiency or clean energy programs – a non-priority. These realities can be persistent, such as non-traditional work schedules, limited technical literacy, or confined social networks. But these realities can also be urgent issues related to housing, health, childcare, or immigration – and this means that energy services simply are not, nor should they be, the top priority.

Customer needs are multifaceted and complex: Equity-focused interventions exist because traditional programs have failed to engage customers who could most benefit from participation. A successful equity program addresses the multifaceted needs customers face – around trust-building, meaningful engagement, economic support, and stability. Because these programs by necessity involve several elements, they are complex, and often take time to plan, implement, and assess.

Traditional program processes are misaligned: Traditional program processes follow a discovery > design > implementation > evaluation cycle. This structure is often misaligned with the processes underlying equity programs, which are more nuanced and require nimble course-correction. In addition, organizational inertia and regulatory requirements can stand in the way of equity program innovation, which requires new success metrics frameworks, cultural shifts, and evolved expectations around how quickly results will shine through.

Energy equity refers to "programs that are informed by the community's input and designed to meet the needs of all individuals. Equitable energy efficiency policies and programs are based on the

principle that each action taken must not deepen, and should reduce, social, environmental, or economic inequalities (ACEEE 2025)." Equity programs are trying to address deeply complex customer issues – and that is made more difficult when there is no single, straightforward 'fix.' Importantly, most equity interventions will only see meaningful impact *over time*, making it critical to track impacts longitudinally.

Why An Energy Equity Metrics Framework?

Equity interventions seek to solve persistent, long-term, and multi-faceted problems in the market. They also need to be adaptable and able to course-correct given the latest information or needs from priority populations. Given the complexity underlying program design – and the need to develop nimble solutions that are culturally responsive and meet the needs of nuanced communities and demographics – it can be difficult to pinpoint and track what is working versus what is not with such an intervention. That is where equity metrics frameworks provide critical scaffolding.

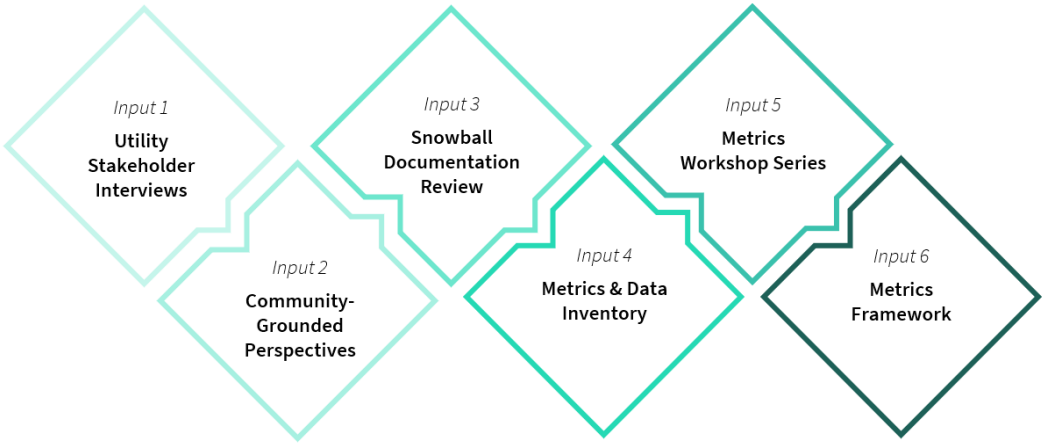
A thoughtfully designed framework establishes clear expectations around the outcomes the intervention seeks to achieve. Equally importantly, it maps out a practical pathway to *measure* desired outcomes. This is particularly important for this type of program design, which often involves several intersecting goals, priorities, and activity streams. For program leads, a metrics framework can serve as a level-setting tool to provide a realistic snapshot of what the program can achieve (and, as importantly, what it cannot).

It can also be a critical tool to share program value to stakeholders – including program and utility staff, community-based organization (CBO) partners, vendors and contractors, and program participants and prospective participants. A metrics framework should serve as a 'common ground' tool, wherein different actors can clearly understand what the program is trying to achieve, how it is going to do it, and how progress will be tracked. We have already discussed the complexity underlying equity interventions; such a framework can distill that complexity into something that is accessible to a myriad of program actors and stakeholders.

A Flexible Roadmap to Develop an Equity Metrics Framework

We have outlined the challenges entities face when designing, implementing, and evaluating equity interventions. But a thoughtfully designed metrics framework does create a path forward. In this section, we recommend a flexible approach to thoughtfully develop frameworks that can authentically and effectively assess equity interventions. Building such a framework requires a series of inputs – utility stakeholder interviews, community-grounded perspectives, a snowball documentation review, a metrics inventory, a series of workshops, and finally, a framework, as shown in Figure 1:

Figure 1. Key Inputs



As noted at the beginning of this paper, none of these inputs are new. These building blocks serve as the standard framework to design metrics in energy programs industrywide. While the fundamentals described in the rest of this paper are similar, the practice is unique. We first describe each fundamental input, then share how it worked in practice, as well as key learnings.

Input 1: Comprehensive Utility Stakeholder Interviews

Utility program staff are the critical knowledge-holders of program information and context. They understand *why* the program was developed, *what* problem it is trying to solve, and *how* they are trying to solve it. But it is important to gather nuanced perspectives across stakeholders. Often, evaluations are siloed among program design and implementation staff. For equity programs—which are often tied to regulatory requirements or have complex, multi-departmental considerations—having a nuanced and balanced perspective is key. This interview process is a true discovery phase and should be used to both collect a comprehensive snapshot of the 'current state' and begin to break down knowledge-sharing siloes.

How it worked in practice: When supporting the Pacific Northwest utility, we conducted 10 rounds of interviews across the following roles:

- Program staff: The program staff provided insight into what barriers or opportunities precipitated the genesis of the program, and broader utility objectives associated with the program.
- Implementation staff: These interviews provided on-the-ground program delivery insights and shed light on community nuances – including the unique needs those communities face and interventions needed to address them. These interviews shared firsthand knowledge of how program design functionally works in the field.
- Data staff: The data team shared data collection, storage, and sharing realities. They lifted the veil on data collection efforts already under way across other initiatives, which enabled our team to identify coordination opportunities.
- Regulatory and policy staff: This team helped us develop a deeper understanding of the legislative mandates – and associated utility priorities – that related to the equity program. They also provided prospective insight into regulatory reporting requirements on a 5-year outlook, which helped our team strategize a framework that could enable responsiveness to these longer-term reporting needs.

- Equity staff: The Equity team provided insight into the utility-wide equity priorities. They helped us gain a more nuanced understanding of priority populations within the service territory, and community-specific challenges and opportunities to engagement.
- Marketing and communications: The marketing and communications team helped us understand the key engagement channels and identify mechanisms to measure engagement.

Practice learnings: The staff interview process was iterative and time-consuming – and necessarily so. Each interview helped us uncover and inform other perspectives we needed to understand, which helped us identify additional staff to incorporate into our interview effort. Our team treated staff interviews as a true discovery process. Importantly, staff interviews also helped our team identify where there was misalignment – or gaps in understanding – around the intent or mechanics of the program.

Input 2: Community-Grounded Perspectives

Community-based organizations (CBOs) can provide nuanced insight into the unique challenges and opportunities that customers or communities face. Importantly, interviews with CBOs should not be treated as an *evaluation* activity in this context, but rather as an *exploratory* activity – their insights will help to inform meaningful evaluation approaches. Given that CBOs may face 'feedback fatigue' from other evaluation or engagement efforts, the research team should draw from both staff interviews and the documentation review to develop targeted questions or topics to cover. CBOs should also be fairly compensated for their time as subject matter experts. Community input should be foundational to any equity metrics framework; as the Energy Equity Project (2022) posits, "energy equity centers the voices of frontline communities in energy planning and decision-making."

How it worked in practice: The utility developed an equity working group to gain perspectives from and broaden engagement with the communities they serve, with a focus on priority populations. The group consisted of 11 members with connections to communities at the frontline of climate change. The group provided critical input to the utility on persistent barriers to equity and offered advisory support on key equity objectives and goals. Their input was foundational to understanding the core "problem statement" and "solutions approach" of the equity program.

Practice learnings: Frontline community members experience equity challenges directly – and can offer key insights into solutions that can work in practice. The equity advisory group offered a knowledge foundation that the program could effectively build upon and underscored how important it was to understand the potential gaps between policy intentions and real-world outcomes that external observers often miss. In addition, community knowledge helped our team to begin to define relevant, measurable indicators of progress.

Importantly, we note that not all utilities may have a standing equity advisory group. If such a body does not exist, researchers could incorporate interviews or listening sessions with community-based organizations into their processes to understand the lived experiences, needs, and service gaps of priority populations in the service territory.

Input 3: Snowball Method Documentation Review

A program documentation review is a rote component of any evaluation effort. While program implementation plans, policy documentation, and integrated resource plans are the common building blocks of a document review, understanding the intent of an equity program requires a more holistic understanding of the 'current state' and the communities the program seeks to serve. This can be achieved through a more expansive documentation review that includes community-grounded grey literature, or information published outside traditional channels that typically reflects on-the-ground

insights and experiences. This could include OpEds, speeches, news articles, or videos. Grey literature provides a way to gain a more nuanced view of on-the-ground perspectives that could impact program administration or outcomes. Of course, these sources should be *additive* to the foundational documentation and data – e.g., implementation plans, relevant policies, and multi-year plans. Additional documentation sources can be gathered through discussions with program staff and CBOs, and through a literature review.

How it worked in practice: Using Inputs 1 and 2 – utility staff interviews and CBO perspectives – as a foundation to uncover relevant information, we took a 'treasure hunt' approach to gather the nuanced and often behind-the-scenes information that were critical building blocks to equity programs. We built out a preliminary workbook documenting key equity challenges and opportunities (the foundation of program goals and outcomes) and proven interventions to expand access to priority populations (the foundation of program activities).

Practice learnings: This exercise is inherently exploratory rather than prescriptive. Our team employed imaginative, expansive thinking around what counted as 'relevant literature' – which helped us uncover background documentation that shed community-voiced light on the equity issues the utility was trying to address. This broader understanding helped our team begin to design a metrics framework that would help the utility design and administer a program that was truly reflective of the needs of the communities it served.

Input 4: Metrics & Data Inventory

Often, metrics are already in place to advance equity focused interventions. These metrics should be leveraged to ensure alignment with other program tracking and research. The process of inventorying and identifying existing metrics will also reveal where existing metrics may be misaligned with program goals, or where tracking is lacking. The metrics inventory is essentially a gap analysis– it reveals key blind spots where program intent is strong, but there is no mechanism to track the outcomes of interventions. Inputs into the metrics inventory should come from staff interviews (Input 1) and the documentation review (Input 3).

How it worked in practice: Our team developed a detailed workbook of potential metrics. First, we categorized information as goals, outcomes, outputs, or metrics – since often data that is *referred* to as a metric is not actually a metric, but instead a desired outcome or goal. This is an important foundational exercise, as it is a common pitfall to conflate the measurement with the end-result an entity wishes to achieve. This exercise enabled our team to:

- Map out the full landscape of preliminary program goals, objectives, outcomes, and metrics – and where those inputs might conflict with one another.
- Collate the metrics and associated data sources already being tracked.
- Understand where "problematic" metrics – i.e., those that are poorly defined or unmeasurable – are in play.
- Identify where gaps in data availability or tracking exist and assess the effort-versus-impact of that data.

The metrics framework we built was a comprehensive Excel workbook that categorized goals, outcomes, outputs, and metrics. We cross-walked where relationships existed between each component and developed a preliminary outline of how we would operationalize measuring each.

Practice learnings: Ultimately, the metrics inventorying process helped our team get a clear snapshot of how the myriad utility stakeholders and CBOs framed the intent of the program – and provided insight into how they were conceptualizing success or progress. We mapped this to our preliminary understanding of data sources and availability. This also helped our team map out where there was divergence or duplication in goal statements. Importantly, we note that this process left us with

as many questions as answers; the workbook gave us a *starting point* – but by no means and end point – on which to build out the framework.

Input 5: Logic Modeling Workshops

Everything prior to this input is the foundational research; workshopping and logic modeling is where the metrics framework comes to life. We facilitated logic modeling workshops to bring together staff across distinct roles who hold unique perspectives. Rather than a single workshop, an iterative approach – where one workshop builds on key decisions or open questions from the prior one – can enable more generative thinking. This also requires a shift in thinking from "evaluator" and "client" roles to a shared "teammates" role. The workshopping process is inherently messy, and to be effective, everyone in the room needs to feel comfortable working through ambiguity. Other fields, namely public health, employ iterative decision-making frameworks that can be applied to this multi-stakeholder structure (Kunst 2024).

How it worked in practice: We facilitated a series of eight workshops with utility staff to develop the metrics framework. Each workshop had a different focus area and built on one another. For the workshops, we took a two-step approach:

- We presented our "best guess" of key assumptions, or a summary of the progress incorporated from the prior workshop, which the group then provided feedback on to ensure information was accurate, valid, and up to date.
- We defined key outstanding decisions or open questions, and supported the group to make decisions where we 1) Defined the decision that needed to be made, 2) Generated 1-3 viable options, 3) Discussed and evaluated options, and 4) Made a decision (using consensus).

This process provided space for utility staff to brainstorm and solve problems together. It also normalized that disagreement and problem-solving was okay. Our eight workshops took the following flow documented in Table 1:

Table 1. Overview of Workshops

#	Purpose	Attendees
1	• Presented the "current state" – i.e., initial findings around the full swath of desired program goals, objectives, and outcomes • Highlighted and workshopped where there was misalignment or where stated goals were outside the scope of the program	Core program staff
2	• Explored two scenarios: success after 5 years (what would show this?) and lack of traction after 5 years (why might this happen?) • Defined key indicators for both success and failure to launch.	Core program staff
3	• Informed by #2, shared refined the program goal and supporting objectives, then brainstormed the universe of program activities • Mapped those to objectives and outcomes and identified gaps in program design	Core program staff; implementation team
4	• Building from the learnings of #3, presented the draft logic model – with a clear throughline of goals, objectives, and short/medium/long-term outcomes – and collected feedback	Core program staff; implementation team; portfolio leadership
5	• Using the refined logic model as a foundation, re-oriented program activities with desired outcomes • Began to workshop success indicators associated with each	Core program staff; implementation team

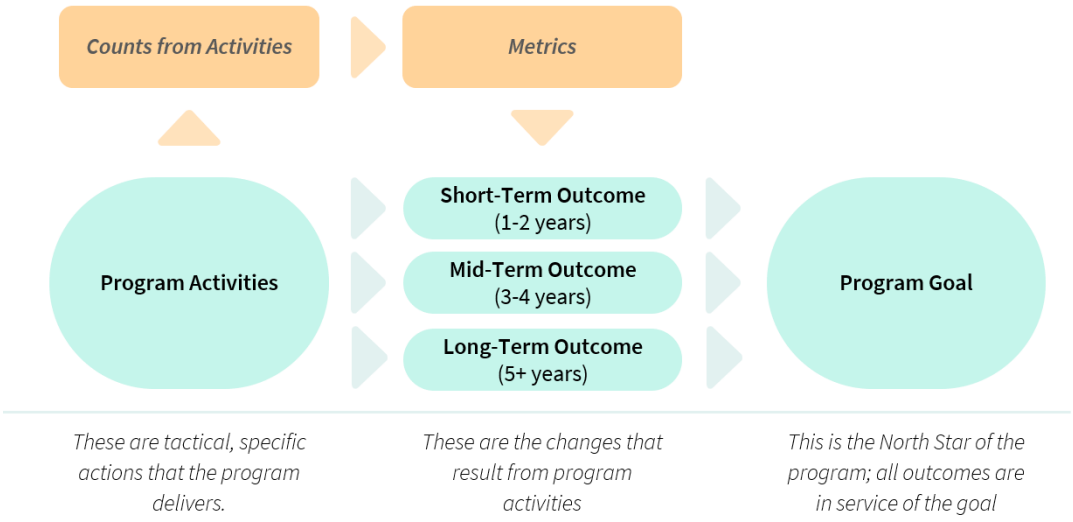
#	Purpose	Attendees
6	• Shared an updated metrics framework that cross-walked outcomes with metrics and utility- or policy-aligned reporting requirements • Workshopped and associated format, desired impact over time, and data source of each metric	Core program staff; implementation team; data team
7	• Continued to workshop metrics • For metrics with high-effort data collection implications, made a go/no-go decision on the value of the metric	Core program staff; implementation team; data team
8	• Socialized a finalized metrics framework for the program that clearly articulated the program goal, its objectives, its outcomes, and key metrics (i.e., how the program will demonstrate success)	Core program staff; implementation team; portfolio leadership; utility leadership

Practice learnings: The workshops were (necessarily so) a "one step forward, two steps back" situation. This is appropriate for an equity program, which incorporates considerations at the portfolio, utility, state, and sometimes federal level. To create a set of sensible, measurable goals and outcomes, the team *needed* iteration. In addition, mapping out how – or if – near-term activities could reasonably lead to longer term outcomes was complex and involved testing out scenarios.

Input 6: Metrics Framework

The workshopping process brought us to the final deliverable: a realistic, applicable, and measurable metrics framework. This framework clearly aligns program goals, outcomes, activities, and metrics to support program teams to identify how activities lead up to intended outcomes – and how to measure the impact of those interventions. The framework contained detailed information to enable metrics quantification (e.g., metrics format, data sources, desired outcome), but also provided a clear crosswalk of the key components of the program theory, documented in Figure 2:

Figure 2. Program Theory Components



As documented in Figure 2, it is important to note that activities yield **counts** (e.g., number of people who participate, dollars invested) – not metrics. These counts are an important *data input* to

metrics, which assess the conditional changes, behavioral changes, attitudinal changes, knowledge and awareness, or the flow of benefits associated with outcomes. Metrics need to be tied to specific, existing data sources – the counts from activities being one of those data sources – to ensure clear and accurate measurement.

How it worked in practice: Metrics frameworks are a critical part of any program, and the final framework followed a standard format. We developed a clear, defensible workbook of short/mid/long-term outcomes, activities, metrics, and measurement details associated with each metric. The *process* is what was different – by collecting more holistic and iterative data, we were able to help the utility truly get at the "why" – and identify what equity outcomes they were trying to achieve within their service territory. This enabled our team to create a more layered view of the program and articulate how near-term activities could build a foundation for longer-term outcomes. This clear mapping exercise also served as a valuable communication tool to other utility stakeholders and provided a "birds eye view" of the program's long-term intent.

Practice learnings: The metrics framework should be a tool to *operationalize* the program theory. It feels important to acknowledge the tension that comes into play when doing this for an equity program; outcomes are often indirectly tied to program activities, and those activities may need to be present in the market for some time before their impact is realized. We also found that the program team was conflating counts from activities with true impact metrics. We provide a few examples of the distinction in the next section.

Activities, Outcomes, and Metrics in an Equity Context

Activities, outcomes, and metrics are all critically important ingredients in a metrics framework, and individually, each provides a signal on if – and how – an equity program is achieving its intended objectives. Collectively, these components comprise a holistic framework that maps out how activities inform short-term changes (outcomes), and how those short-term outcomes facilitate and lead to broader and more expansive impacts (e.g., mid- and long-term outcomes). We illustrate a sampling of potential activities and associated counts (Table 3) and outcomes and associated metrics (Table 4) that might be present in an equity program. Note that this is just a selection of Activities, Outcomes, and Metrics to help illustrate the nuances between them – this is not a comprehensive case study of the metrics framework, but rather a small sampling of the framework.

Additionally, equity programs can only be successful if the utility has a clear idea of **who** they seek to serve. This utility established utility-wide priority population criteria drawing from both geographic and individual identifiers. These criteria became the foundation for identifying which populations the program would prioritize in its equity efforts. While we do not discuss methods to identify priority populations in this paper, we underscore the importance of this foundation, as Prezioso (2021) posits: "to advance energy equity, one must start with an understanding of population distribution within a society… where are energy prices higher or more burdensome, who is able to make their monthly bill payments, where have energy efficiency measures been put into place, and who has better quality of life?"

For the purposes of this example, consider that the program is a *clean energy awareness program that seeks to engage, learn from, and share information with priority populations around how the utility's clean energy investments might impact them and their communities in the near and long-term.* Table 3 shows a sampling of tactical program activities. The program team can track counts to understand the reach of a given activity.

Table 2. Sample Activities and Counts

Activity		Counts
1	Create interactive in-person experiences that enable two-way input and conversation with priority populations.	# of interactive engagements at in-person activities
2	Create outreach content with priority population community partners.	# of content pieces co-created with priority population community partners
3	Conduct research and gather community input to better understand priority populations' needs and preferences (through Equity Advisory Group, listening sessions, customer surveys).	# of surveys and post-event/activity surveys # of listening sessions with customers and CBOs # of equity Advisory Group engagement opportunities

The activities (and their associated counts) from Table 3 serve as key inputs, or building blocks, to achieve program short-term outcomes (see Table 4).

Table 3. Sample Short-Term Outcomes and Metrics

Short-Term Outcome		Associated Activity	Metric	Data Source
A	There is deeper participation with priority populations in outreach activities and events.	1 3	Increase in customers from priority populations *participating* in community events Increase in priority population customers *engaged* at events via in-language materials, targeted offerings, and in-group representatives	Review of documentation from community events
B	Equity program is responsive to the needs and perspectives of priority populations and designs program and activities accordingly.	1 3	Documented changes in program interventions based on input from Priority Populations and other implementation learnings.	Log of findings and actions associated with events and interventions
C	Program invests in priority populations by using local vendors for program outreach	2	Sustained proportion of program investment dollars in priority populations	Longitudinal review of program investments

Short-term outcomes – and their associated metrics – then feed into mid-term outcomes (Table 4) and long-term outcomes (Table 5).

Table 4. Sample Mid-Term Outcomes and Metrics

Mid-Term Outcome		Associated ST Outcome	Metric	Data Source
I	Utility has an increased supplier list with priority population service capabilities (e.g., characteristics that are uniquely suited to reach and engage priority populations)	A B	Increase of suppliers on Utility's Supplier List with capabilities to serve priority populations	Longitudinal analysis of supplier list
II	Utility has built trust with priority populations and CBOs that serve them.	A B C	% change of priority population customers who trust utility% change of CBOs who trust utility	Longitudinal assessment of interviews with CBOs; customer pulse survey trust and satisfaction questions

Table 5. Sample Long-Term Outcomes and Metrics

	Long-Term Outcome	Associated MT Outcome	Metric	Data Source
1	Priority populations support utility's net zero goals and actions.	I II	% increase in priority population customers supporting net zero	Longitudinal analysis of pulse survey net zero questions
2	Increased enrollment in utility clean energy programs in priority populations.	I II	% change in utility program participation by priority population customers	Longitudinal analysis of program participation data
3	Utility increases its partnerships with CBOs and other entities in priority populations.	I II	Increase in # of priority population entities who engage with utility directly	Longitudinal review of engagements

As this example illustrates, program activities, outcomes, and associated metrics are not always perfectly connected. That is why a metrics framework serves as an invaluable tool that documents the throughline of what the program is trying to achieve, and how to track progress.

Key Takeaways

Equity programs are inherently complex, and clearly mapping out feasible, defensible goals—and the activities and outcomes that layer up to those goals—are a challenge. Below, we share key takeaways that can support a meaningful and useful equity metrics framework.

Embrace the mess. Traditional energy efficiency programs typically have straightforward program theory. For example, in such a program, the utility conducts outreach (Activity 1) and provides an incentive (Activity 2) to compel customers to adopt an energy-efficient measure (Activity 3). This leads to bill savings (Outcome 1), energy savings (Outcome 2), and customer satisfaction (Outcome 3). As we have described throughout this paper, equity programs have more nuanced program goals and, often, a longer outlook to achieve change. This means that the program theory becomes messy. Embedding heavy iteration through workshopping can facilitate a process to map out the complexity, then begin to detangle it. For this utility, we developed six drafts of the framework – and normalized the expectation that each draft would require iteration, revision, and occasionally taking two steps forward and one (or two) steps back. It marks a departure from our industry's emphasis on efficiency and 'getting it right the first time.'

Ask "how?" (and ask it repeatedly). Equity programs are sometimes set up for failure when they create goals that are not achievable. By *asking* through workshops and *showing* through the metrics framework, we interrogated **how** the program would operationalize its stated equity goals. The utility determined that its initial goals could not be supported by outcomes and metrics, so we course-corrected and developed new goals that were both impactful and feasible.

Center community perspectives into the process. This utility had an established equity working group comprised of representatives from priority populations, and they were able to inform the process throughout the design and implementation process. For entities that do not have a standing community advisory body, we recommend embedding workshops with community-based organizations into the process. They can provide insight on the priorities of their communities – and shape the desired goals and outcomes of the program.

Make space for cross-utility coordination. Complex equity-based metric creation requires both broader and deeper integration across teams within the utility. Making space – and time – for this coordination is critical to developing metrics that matter. There is a wealth of behind-the-scenes work

that the evaluation team needs to do between workshops to synthesize and align key findings and define where misalignments exist. Bringing together stakeholders who play critical roles in the program, implementation, regulatory, data, and equity space can be logistically challenging and time-consuming. But it is enormously beneficial to – from the get-go – gather all the critical perspectives and context to set a program in for success.

Look beyond energy. While available literature on measuring outcomes from long-term energy equity programs is limited, other fields – namely public health and education – have been developing related interventions for decades. As part of our documentation review, we explored the metrics frameworks of several non-energy programs, including:

- Harvard Catalyst's Community Engagement Program, which seeks to increase the pace of adoption of evidence-based programs and policies to promote health, prevent disease, and eliminate disparities
- The Truth Initiative, a campaign to create a future free from nicotine addiction
- Rainier Scholars, a Seattle-area program that cultivates students' academic and leadership potential through rigorous, transformative opportunities
- Harlem Children's Zone, which offers on-the-ground, all-around programming that builds up opportunities for children, families, and communities to thrive in school, work, and life

These programs informed a blueprint to track long-term outcomes among priority populations.

Start early (and revisit). We engaged in the metrics framework development process as the utility was just standing up their equity program. By collaborating early, this work helped inform the goals and objectives of the program, and the associated activities to help the program reach its goals. This ensures that equity programs are not set up for failure by working toward goals that are not feasible – or are misaligned with its program activities. Importantly, the metrics framework should be revisited and fine-tuned annually to ensure it reflects the direction of and on-the-ground learnings of the program.

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