# Food for Thought: Learnings from a Curiosity-Centered Approach to Understanding the Restaurant Industry

*Leila Shokat, Energy Trust of Oregon, Portland, OR*
*Erin Harper, ILLUME Advising, an ESource Company, Madison, WI*
*Angel Swanson, Beira Consulting, Monmouth, OR*
*Steve Cofer, Uplevel Energy, Portland, OR*
*Laura Schauer, ILLUME Advising, an ESource Company, Madison, WI*

## ABSTRACT

Energy efficiency programs have experienced challenges meaningfully serving restaurant owners. Traditionally, research into this sector has tended to group all restaurants, or all small businesses, into one category, minimizing voices and individualized needs. The independent restaurant sector[1] includes a high percentage of BIPOC and women owners, has high energy use intensity compared to other business types, and a high proportion of renters. These businesses represent a critical, yet underserved, segment of the commercial foodservice industry. They also offer unique opportunities for wealth building, cultural preservation, community infrastructure, and increased cultural understanding. Our team conducted a community-based research project aimed at deepening our understanding of these businesses, their decision-making, and their equipment supply and repair networks. By assembling an advisory committee to guide the research from the start, and being responsive to emergent findings throughout the project, we were able to develop a better understanding of the networks these restaurant owners rely on to obtain, repair, and replace their equipment. Our experience conducting this research reinforced the importance of time, trust, and flexibility in conducting this kind of research. We took our time and moved at a pace that prioritized stakeholder involvement and mindful engagement with restaurant owners. We built trust with stakeholders and research participants through open communication, transparency, and patience. Finally, we were flexible in our methods while remaining committed to the purpose of this research. Together, these factors allowed us to build a deeper understanding of this sector.

### Introduction

Energy efficiency programs have not historically served small businesses well, though we have understood a number of the barriers to small business participation for some time. These include limited access to capital, limited time to research energy efficient options, higher cost of equipment relative to bill savings, split incentives for business owners who rent their space, and a lack of information and equipment options that are sector-specific (Langner, Hendron, and Pless 2013).

Within Energy Trust, the Commercial program has implemented no-cost direct install programs for small businesses to address some of these barriers. These offers help to engage small business owners with energy efficiency, build a sense of goodwill and trust, and address some of the above barriers by offering no-cost, renter-friendly equipment like LED lighting and smart thermostats. Further, program evaluations have shown that these direct install offers have brought in many first-time Energy Trust customers, as well as a higher proportion of businesses owned by women or racial minorities (ADM

[1] In this research, we use the term “independent restaurants” to refer to independently owned, non-franchised restaurants. Energy Trust staff had many discussions around terminology related to the focus of this study; the research team felt that some business owners who we intended to include may not resonate with the term “small,” and the size of an establishment was comparatively less important to us than the ownership type of the business.

Associates, Inc. and Encolor 2023; ADM Associates, Inc. and Johnson Consulting Group 2025). Even amidst these successes, challenges remain for serving these businesses in a deeper way.

To identify opportunities to better serve small businesses, and recognizing there is considerable variability within this segment, Energy Trust decided conduct a targeted study focused on better understanding independently owned restaurants. There is little research on energy efficiency needs and equipment for this group. Additionally, they were of interest from an equity perspective; the independent restaurant sector includes a high percentage of BIPOC and women owners, has high energy use intensity compared to other business types, and a high proportion of renters (National Restaurant Association 2025).

Independent restaurants also do not have a strong influence on the supply side, which focuses on meeting the needs of the majority (generally, franchisees). Equipment research and development is not conducted with independent restaurants' needs in mind; therefore, there was interest in exploring whether there were missed opportunities for manufacturers, as well as the supply-side market in general, to serve this sector.

To identify program design and market opportunities to better serve independent restaurants' energy needs, Energy Trust set out to conduct a research study to gain insights about this sector including their business practices and decision-making, equipment purchasing networks, and trusted resources. Recognizing the higher ownership of racial minority groups, the study also sought to understand cultural factors that influenced their experiences and decisions.

This project intentionally differed from Energy Trust's traditional research practices by centering community voices within a flexible, learning-driven approach. First, Energy Trust engaged an advisory committee of stakeholders to shape research goals and methods. Energy Trust and their research advisor identified these stakeholders based on their deep community connections or deep knowledge of the restaurant supply chain. Additionally, the study relied on "key contacts" to engage independent restaurants. Finally, the research team, including Energy Trust's research advisor, focused on inclusive, culturally responsive practices, which required adapting the research in real time based on emerging insights. This iterative process—marked by ongoing reflection on and responsiveness to emergent findings—helped to keep the research grounded in community needs and positioned to inform more relevant, equitable program offers.

In this paper, we focus primarily on learnings from the research process itself, though we do also share some findings to illustrate how this research process led to deep insights we would not otherwise have found. These learnings may support other researchers in considering how to implement more community-centered research projects, anticipate challenges, and set projects up for success. These process-related findings also offer considerations for program design geared towards populations or markets that have not been served well by efficiency programs. The central themes identified in our learnings are outlined below:

**Time and up-front investment:** This project was supported by collaboration between evaluation staff, program and implementation staff, advisory committee members, a dedicated team of researchers and research advisor, and other collaborators. We also leaned on many people within Energy Trust who enabled us to convene an advisory committee and stay committed to our goals of broad language accessibility and transparency of the study. We provide reflections on the time and resources it can take to support this kind of research.

**Trust and relationships:** Trust and the importance of relationships emerged as the most important theme throughout our research, including in the initial development stages with the advisory committee, during data collection, and in feedback directly from restaurant owners. In this paper we reflect on how this theme influenced how we designed and conducted this research and what we learned to improve on in the future.

**Iterative approach:** Throughout the research process, we continually revisited the project's north star: helping programs better understand the independent restaurant owner market to better serve them. As a result, the relationship between our research methods and research questions continually evolved. The team used interim results to guide upcoming research tasks, digging deeper into emergent themes that we believed would get us closer to our goal. We discuss this process and provide our thoughts on how research teams can build this reflection into their project planning.

## Methodology

This study set out to understand the unique equipment needs, barriers, and purchasing decisions of independent restaurants in Oregon. This research, as initially designed, had three main objectives:

1. Understand the characteristics of independent restaurants and their operations, including how these operations impact their decision making and constraints.
2. Understand equipment sourcing and supply chain for independent restaurants for cookline and refrigeration equipment, including their purchasing decisions, where they source equipment from, and how the people they source equipment from impact their decision.
3. Identify gaps in efficient equipment and efficiency services in independent restaurants, including availability of efficient equipment, barriers to adoption of efficient options, and areas of opportunity for Energy Trust to address those gaps and barriers.

The research team recognized that there was a lot we did not know about this market segment. For this reason, it was important for us to approach this project with the intent to learn as we went, and to adapt our approach to achieve the overall goals of the project. At key decision points, we kept in mind the following goals of the project:

- Develop a deeper understanding of independent restaurant owners and their networks.
- Identify specific opportunities, rather than barriers that have already been characterized.
- Keep a broad view of the market and supply chain these businesses exist in, and identify places for Energy Trust to engage most effectively.

### Recruitment and data collection

The research team set out with a goal to conduct 60 site visits at independent restaurants to catalog the energy-using equipment present in these businesses, as well as to understand their business practices and equipment purchase decisions. To identify and connect with these businesses, the team first relied on a "key contacts" approach, leveraging individuals that had connections with independent restaurant owners to recruit restaurants in this study. The team also used a snowball sampling approach, identifying potential study participants through the recommendation of a restaurant owner that completed the study. Finally, the study recruited from a customer list from Energy Trust's Small Business Direct Install outreach team. In addition to having an established relationship with customers, the study benefitted from this contract list as it identified the business owner's preferred language, had high coverage of contact information, and listed a member of the program outreach team who was the primary contact for each business and made initial outreach. These sources provided the opportunity to reach out to businesses who had not participated in Energy Trust programs in the past, as well as those who had.

Once recruited, the study team conducted site visits and interviews with restaurant owners, accommodating their work schedules. Site visits averaged an hour and involved cataloging different equipment types present as well as their makes and models. Where possible, the team conducted interviews during the visit. Doing so allowed for more organic discussion about how they purchased equipment, decision-making about the purchase, equipment maintenance, and other topics. The interviews were vital in providing additional information on why certain types of equipment were present in their restaurants, as well as what they considered important during equipment purchasing. Conducting

interviews centered on the restaurants' operation practices allowed the research team to gain a more complete understanding of how restaurant owners make decisions and prioritize in their day-to-day lives.

Where feasible, we conducted interviews in the language that the restaurant owner was most comfortable speaking in. The research team was able to ascertain this need ahead of time through the recruiting process, either through information shared by a key contact, from prior knowledge of the customer from their participation with Energy Trust, or asking the customer explicitly in initial communications.

In the initial research scope, Energy Trust placed a heavy emphasis on conducting a large number of site visits with independent restaurants that serve a variety of cuisines. The initial scope called for 60 completed site visits and interviews, prioritizing outreach to non-participants. We designed the research this way because Energy Trust hypothesized that there was considerable variation in equipment needs by restaurant and cuisines served, and wanted sufficient sample sizes to say something meaningful about those differences (albeit qualitatively). There was particular interest in specialty equipment specific to cuisines- for example, a wok burner or noodle well. This originated from feedback Energy Trust had heard from business owners, who noted that certain pieces of equipment do not currently have an efficient version available.

In reviewing the equipment identified in the first 23 site visits, the research team did not see consistent pieces of specialty equipment. Rather, we saw broad alignment of the core, high energy-use equipment types. Additionally, when probing for opportunities or needs to have access to higher efficient equipment, the research team learned that *efficiency* as defined in the energy efficiency industry did not factor into decisions to purchase this equipment. This indicated to the research team that further equipment inventory through site visits might have less value than focusing on learning who or what *did* influence restaurant owners' decision making in their core cookline equipment purchases, which were the bulk of their high energy use equipment.

This prompted several research team discussions about the priorities of the research project, the relative benefits of conducting further site visits with the results we had observed so far, and the potential for other paths forward with these findings. The research team took time to process these initial findings and identify alternative avenues for exploring questions that were in alignment with our overall research goals and priorities.

Ultimately, the research team decided to expand the study focus of the supply-side market in two ways: 1) interviewing contractors who service and install cooking equipment, refrigeration and/or HVAC equipment for independent restaurants and 2) speaking with industry experts through informal conversations as well as a key restaurant equipment event, the North American Association of Food Equipment Manufacturers (NAFEM) conference.

**Contractor interviews:** In our preliminary analysis of restaurant owner interviews, we observed that these contractors or handymen play a key role in restaurant owners' equipment decisions and could offer additional insight into this decision-making processes. The team identified contractors to interview through two sources: 1) referrals from restaurant owners interviewed (who provided names of contractors they work with) and 2) extensive internet research to identify companies or individuals who serviced commercial restaurant equipment in Oregon. The latter approach was less productive without a specific contact name or referrals; the team attempted recruiting these contractors through general communications to these such as the companies' web forms, general contact emails (e.g., admin, info or service) and telephone cold calls. In the end, the research team spoke with five contractors, two of whom had been in the business for 30 or more years.

**Industry discussions:** To further explore the new equipment development angle and hear about any new efficient equipment that might be suitable for the independent restaurant sector, the research team also spoke with experts familiar with equipment availability and development within the restaurant industry. The team also attended the NAFEM conference in Atlanta, Georgia and met with industry leaders

to understand if and how manufacturers were considering independent restaurants and efficiency in their technology development. While at the conference, the research team collected information on emerging technologies in the market, needs of manufacturers for equipment development, and overall presence of energy efficiency. Finally, the research team gathered contact information from the manufacturers of interest and discussed their current equipment in development, development process, and interest in serving the independent restaurant segment. This research helped to understand the market at a macro level to understand how the industry perceives independent restaurants and energy efficiency.

### Scope

In designing and conducting this research, we aimed to strike a balance between generalizability of results, and the importance of specificity in understanding a particular market we seek to serve. We balanced the desire to understand the small business sector broadly, with the knowledge that "small business" encompasses so many disparate business types that present different challenges and have different opportunities. In focusing on independently owned, non-franchised restaurants, and prioritizing the recruitment of restaurants that serve a broad range of cuisines, we sought to draw a line that would deliver useful and specific results while representing a broad range of restaurant owners within this definition.

Our results leave out some key elements; we had limited recruitment in more rural areas of Oregon, for example, where supply chains and equipment purchasing are likely to look quite different from Portland Metro or surrounding cities like Independence. Our networks in rural areas were not as extensive as we had hoped they would be at the outset, and this hampered our recruitment and site visits in those areas. Even within the walls of the restaurants we did site visits in, we limited our focus primarily to cookline and food storage equipment over lighting and HVAC equipment. This was because of the relative importance of cookline equipment in these businesses, and because this equipment is what restaurant owners have the most control over, as many are renters in their spaces.

## Results

### Time and up-front investment

This study brought together an advisory committee consisting of business owners, community members with connections in the small business sector, and people with experience in energy efficiency, foodservice equipment, and market transformation. Bringing together a group with such varied expertise and background knowledge required thoughtful facilitation and deliberate engagement to ensure that we heard from all members and properly valued their time.

Early in the scoping process, the Energy Trust evaluation project manager contracted with a research advisor experienced in community centered program design and learning. The role of the research advisor was to help ensure the project was taking a community-centered approach from start to finish, including scoping, RFP development, fielding, interpretation and reporting. As part of this, it was important that community members be involved as early as possible in the scoping and objective setting process of the research. Once it was determined that the research would focus on independently owned, non-franchised restaurants, the project manager and research advisor started the process of convening an advisory committee.

Energy Trust and the research advisor convened the advisory committee to serve multiple purposes throughout the project, including:

- Provide input on the scope and research questions for the project
- Advise on appropriate methods for the project
- Identify important skills or capabilities that a successful research team should have

- Participate in the selection process for a research team
- Provide feedback on data collection materials and study communication materials
- Act as key contacts for a snowball sampling approach, provide introductions for restaurant owners to participate in the research
- Help process results of the project and provide input on how Energy Trust should use these results

Advisory committee members were identified by program staff, Energy Trust outreach staff, and the research advisor. The committee consisted of business owners, community leaders, efficiency program professionals, community advocates, and other stakeholders. To ensure the advisory committee would be able to invest the time necessary to support this large research effort, the Energy Trust project manager established individual contracts with each advisory committee member to compensate them for their time as a consultant on the project. From the start it was important to support the advisory committee members in participating as fully as they wanted and were able to, and this compensation structure was a key step.

The next step in supporting an effective advisory committee was hosting an orientation meeting for the research project. This was a 2-hour virtual meeting consisting of presentations about the history of Energy Trust, its past and increasing efforts in serving restaurants, how efficiency measures are developed and offered, and the specific motivations behind this research project. In this meeting, the advisory committee had the opportunity to learn and ask questions about some of the frameworks Energy Trust works within, and how this research aimed to address challenges for the program in serving independent restaurants.

Establishing open communication, and offering different modes of communication, was another key element in a successful advisory committee. The research advisor on the project also served as a liaison to the advisory committee, meeting and talking with them both in meetings and more informally to check in about their thoughts on the project. The members could reach out at any point, and the research advisor would check in periodically to engage them throughout the project. This helped advisory committee members have both formal and informal channels to provide study feedback.

Another element of open communication was language access; many advisory committee members spoke Spanish, and some preferred to participate in meetings in Spanish. In the last year, Energy Trust of Oregon's Communications and Customer Service team established an internal system for requesting and obtaining translation and interpretation services from a pool of pre-qualified firms. This new system allowed anyone in the organization to request these services with just two weeks' notice. This system played an instrumental role in supporting advisory committee meetings with interpretation, as well as supporting translation of study materials throughout the research project.

These early investments in setting up a structure for the advisory committee to be able to participate in the study to the extent they desired, to be able to provide open feedback through multiple channels, and to have the context necessary to give feedback on the project, supported later work with the advisory committee. After the advisory committee was onboarded, the team began formal RFP development. The project manager and research advisor presented the overall structure and approach of the research to the advisory committee in a virtual meeting for discussion and feedback, and the RFP was edited to reflect the feedback heard in this meeting. Two advisory committee members were also asked to participate in reviewing research team proposals and selecting a contractor to carry out this project. After Energy Trust hired a research contractor, the advisory committee participated in the kick-off meeting to share their thoughts, guidance, and priorities with the research contractor, ILLUME. Throughout the study, the ILLUME team worked with the research advisor and advisory committee to carry out the snowball sampling approach for site visit recruitment, and in a few cases advisory committee members were able to accompany the research team to recruit sites or conduct site visits at restaurants they had a relationship with.

This experience working with an advisory committee on the research guided the research team to be more attentive to relationships as we conducted outreach, to be aware of the expectations we were setting with potential study participants, and to take the time to build trust with restaurant owners during the study. The following section discusses in more detail how trust played a role in this study.

**Trust and relationships**

Throughout the project, we heard the message from stakeholders and advisory committee members that trust was the biggest factor in working with these business owners. As we saw how this played out both in our data collection process and with what we were hearing in interviews about restaurant owners' decision making, we knew that this research would be incomplete without further exploration of this theme.

In early scoping meetings with our advisory committee, in particular when discussing the timeline of the research, we heard repeatedly that we would need to build in more time and be patient with recruitment, because it would require us to build trust among these restaurant owners. We laid out plans in the RFP that we felt would be important to this process. Some of these were relationship-focused: there would be continuity in outreach and site visit staff on the project to maintain the relationship with the restaurant owners, we would primarily approach recruitment through key contacts and snowball sampling, and we would invite the key contact for a restaurant to be present at the site visit if they wanted to. Other elements were more specific to how we talked about the study, and how we would communicate with study participants: we would not use the word 'audit' to describe our site visits, we put together many types of outreach and awareness building materials to promote transparency, and wherever possible we had staff present that spoke the owner's preferred language. We worked on these important aspects of the project approach with the advisory committee during detailed RFP development. While we were providing a participation incentive of $250, the advisory committee warned that this would not necessarily be a selling point for participants, and it could even make them suspicious that this was a scam. We felt it was important to provide this for the time commitment we were asking for, but we were aware not to lean on the incentive as a central selling point of study participation.

During the fielding process, the research team attempted to rely on key contacts for restaurant contact information, introductions, and sometimes in-person recruitment. Key contacts included the advisory committee and the research advisor, as well as anyone else the research team met who could introduce us to potential participants. When a connection was made in this way the restaurant owner was often excited to participate, because we were accompanied by someone they trusted. However, due to the time and availability constraints of these restaurants, the research team still was not able to reach the desired number of completes through this channel alone. Additionally, we had some instances where key contacts had many restaurants in mind to connect us to, but unfortunately these restaurants had closed recently.

The research team also attempted to reach a wider base of restaurants through advertisements on social media for the study. The social media outreach included advertisements on Facebook and Instagram that led to an interest form. Additionally, the Energy Trust website had a detailed page about the study that was translated into Spanish, Mandarin Chinese, and Vietnamese. Unfortunately, as this outreach method could not be targeted to a specific audience, it led to a number of scam leads that were not restaurant owners, and did not lead to any successful site visits or interviews.

To supplement the key contact data, the research team conducted door to door, cold call visits to a number of restaurants with a community-based organization that works to empower Asians and Pacific Islanders in Portland, including providing technical assistance and resources to AAPI-owned small businesses. The research team also conducted similar neighborhood walks with Spanish speaking restaurants in Independence, Oregon, accompanied by a community member there. These two avenues were chosen due to the relationships of trust that were already present in the community. Similar to the

key contact introductions, being accompanied by a community member or trusted group helped the research team have some level of "proxy trust" with these restaurants (Lucero, Wright, and Reese 2018).

Finally, the research team used program participation data from the Energy Trust Small Business Direct Install lighting program to reach a wider audience of restaurants. In this data collection, the research team built off the relationships already established by Energy Trust by having the program team do the first round of outreach to these previous participants. Additionally, these participants were of particular interest because while they had received or expressed interest in direct install lighting measures from the Energy Trust programs, they had yet to engage with commercial program offers beyond that.

**Iterative approach**

This research was conducted in two main phases. First, we conducted site visits and interviews with restaurant owners. Second, after consideration of the results we had seen thus far, we chose to pivot and conduct interviews with restaurant equipment servicers. This section discusses central findings from these activities and details the decision to pivot our research activities.

From the 23 site visits, we found that the majority of the equipment present in the independent restaurants in this study were older models. This is in part because many of these restaurants inherited their cookline equipment when they started their restaurant. Old equipment tends to be less energy-efficient, which could potentially consume more energy to perform the same tasks compared to newer, more energy-efficient models. The team collected information on the cookline and food storage equipment present, but for much of the equipment, model numbers or name plates were inaccessible, hidden, or too worn out to read. For cold storage equipment, for example, the research team observed 109 units and was able to identify that 18% of equipment was not ENERGY STAR certified, and 17% was ENERGY STAR certified. The remaining 64% of units surveyed could not be confirmed one way or the other due to missing make and model information. Similarly, for hot cooking equipment, only nine out of 89 units could be specifically identified, and none of these were ENERGY STAR certified. These findings indicate there is opportunity to support restaurant owners in adopting more efficient foodservice equipment, and interview results provided insight on how best to approach this work.

When attempting to understand independent restaurants, their operations, and their equipment purchasing decisions, three key themes emerged: 1) relationships are key, 2) margins are tight, and 3) messaging is critical. From the perspective of these restaurant owners and the contractors that serve them, energy efficient equipment can be expensive, difficult to source, hard to maintain, and not perform up to their standards. While these stereotypes may not be inherently true of this equipment, programs face an uphill battle in combatting these constraints and perceptions.

Restaurant owners emphasized the importance of building and maintaining strong relationships in their business whether it is the customers they are serving, the staff they employ, the contractors that they work with, or the businesses in their community. We heard from many restaurants that they have a network of people they trust in the industry to help them make business decisions. For many restaurant owners, one of the most crucial people when it came to their equipment operation was their handyperson or contractor, who they would work with to address equipment repair and replacement.

These initial site visit and interview findings made a few things clear. First, we were not uncovering widespread use of equipment types not currently supported by energy efficiency programs. There were some pieces of specialty equipment, but these were not ubiquitous, and they were not the primary drivers of energy use in these businesses. Second, interviews indicated that the contractors or handypeople who primarily service cookline equipment were not necessarily the same kinds of installation contractors who we primarily engage with through Energy Trust's trade ally programs. From restaurant owners' accounts, they were providing critical services outside of equipment installation that helped these restaurants remain operating through equipment challenges, and acted as advisors when it came time to replace equipment. These takeaways from site visits and interviews indicated to us that there would be more

novel and applicable insight to be gained by understanding the role of these contractors in the restaurant equipment market, and we made the decision to pivot to begin recruiting and interviewing contractors.

Contractors reported that customers ask their opinions on replacement equipment as well as decisions to repair versus replace faltering equipment. While Energy Trust works with installation contractors to deliver many program offerings, only two of the five contractors we spoke with were Energy Trust trade allies, and most of them were unaware of specific cookline equipment incentives for the restaurants they work with. Additionally, most of the contractors said they were familiar with efficient equipment, but that sometimes efficient equipment was harder to service versus "lower tech" solutions.

This perception of efficient equipment as more difficult to repair is particularly challenging in this sector, because with tight margins and a willingness to work through challenges on their own, restaurant owners expressed a strong preference for equipment that they could service and maintain themselves. Restaurants and contractors both reported that while they would try to fix equipment to keep it operational as long as possible, many times the cost of repair was not worth the investment and therefore they would just replace the failing equipment. When they purchased new equipment, these same factors of durability, ease of maintenance, and cost were the most important factors rather than new features or energy efficiency of the equipment.

Taking these findings together, we saw that service contractors are an important and under-engaged player in the decision-making process of these independent restaurants. While contractors and restaurants are not opposed to energy efficient equipment, there is a need for information on how to service and operate this equipment. If contractors are not as comfortable servicing the equipment, or if they observe instances where this equipment does not perform up to expectations, then they will not recommend it to restaurant owners, and it will likely not enter these restaurants.

## Conclusions

This research project shows the importance of time, trust, and flexibility in conducting community based research that seeks to deepen our understanding of a specific market sector or business type. The ability to take our time allowed us to move at a pace that prioritized stakeholder involvement and mindful engagement with restaurant owners. The importance of trust was reinforced at every point in the project—in feedback from advisory committee members, repeated conversations with potential study participants to promote transparency, and the way restaurant owners navigate their own business relationships. Finally, flexibility in methods and a commitment to the goals and purpose of this research allowed us to react and refocus based on what we learned, to arrive at a deeper understanding of how independent restaurants operate, and how efficiency programs can engage them more effectively. This flexibility, we believe, is critical if researchers hope to deepen understanding of new niche sectors. We don't know what we don't know, and building in project checkpoints for reflection and potential redirection can help keep researchers closer to the sector they seek to understand, rather than remaining fixed to the plan and unable to ask questions we could not have formulated from the beginning.

At the time of writing, we are still in our reporting and close-out phase of this research. We are processing our learnings and documenting these for future research projects at Energy Trust, and are also having discussions with the advisory committee about their experience. Feedback that we have heard thus far has been that members appreciated the opportunity to work on this project, and would have liked more opportunities for group discussion throughout. An improvement for similar projects could be establishing a time-based cadence for advisory committee meetings, rather than a project milestone-based cadence. We planned to convene the entire advisory committee at key milestones in the project, however the drawn-out recruitment and data collection periods meant that these milestones were much further apart than originally anticipated.

We are also working with Energy Trust's Commercial program to help incorporate these results into their program design in the coming years. We hope that researchers who seek to conduct in-depth

research within niche sectors, or researchers who hope to conduct community-based research, can benefit from some of our learnings from conducting this research.

## References


ADM Associates, Inc. and Encolor. 2023. "Process Evaluation of Energy Trust 2022 Business Lighting Program."

ADM Associates, Inc. and Johnson Consulting Group. 2025. "Process Evaluation of Energy Trust 2022-2023 Existing Buildings Program."

Langner, R., B. Hendron, and S. Pless. 2013. "Industry Research and Recommendations for Small Buildings and Small Portfolios." Golden, CO: National Renewable Energy Laboratory.

Lucero, J., K. Wright, and A. Reese. 2018. "Trust Development in CBPR Partnerships." In *Community-Based Participatory Research for Health*, edited by N. Wallerstein, B. Duran, J. Oetzel, and M. Minkler, 61-76. San Francisco, CA: Jossey-Bass.

National Restaurant Association. 2025. "Restaurant Owner Demographics."