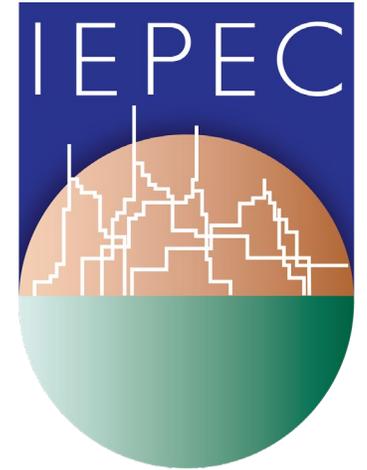


ENERGY EQUITY IS NOT JUST A BUZZWORD:  
A NOVEL ENERGY EQUITY PROGRAM  
EVALUATION METHODOLOGY

PREPARED FOR:



PREPARED BY:



# HISTORICAL FOUNDATIONS OF ENERGY EFFICIENCY



## DEMAND SIDE MANAGEMENT

Total energy saved. Who saved and when was not important.



## TARGETED PROGRAMS

Realization that efficiency didn't benefit everyone led to targeted programs.



## TECHNOLOGY ADVANCEMENTS

Deeper interest in where and when energy savings occur.



## GROWING RECOGNITION

Traditional programs may not meet the future needs of a utilities or communities.



# CALL TO ACTION: TRANSFORMING UTILITY LANDSCAPE

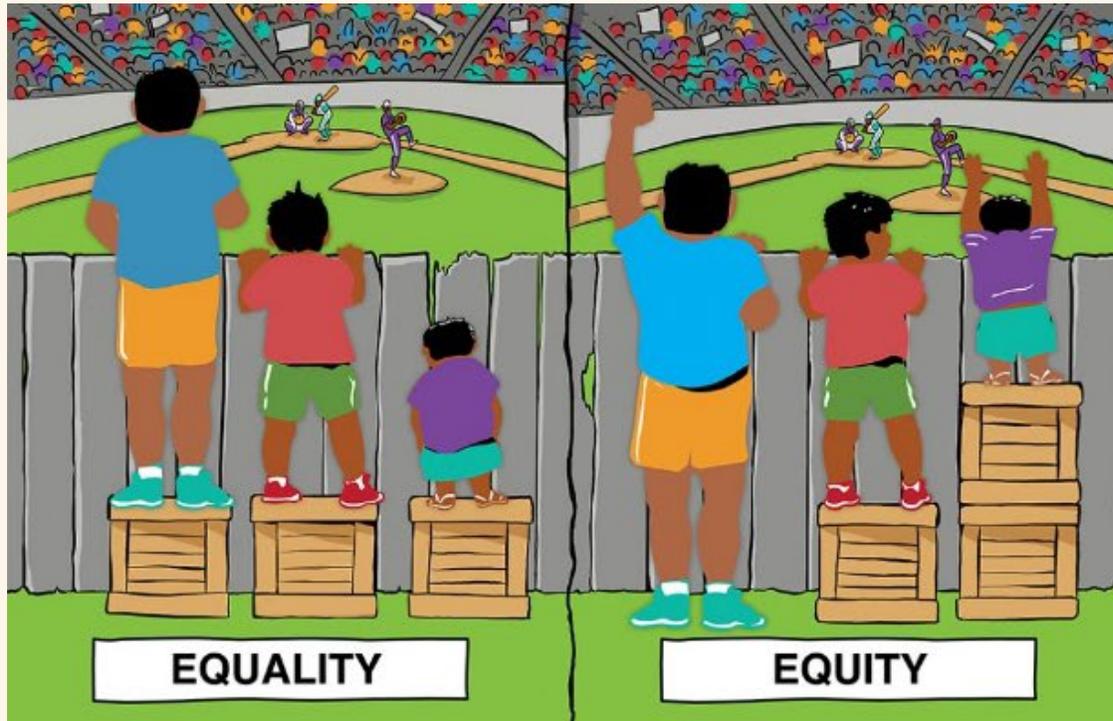
**Utilities have an obligation to provide reliable power to all and an interest in doing so equitably**

calls us to...

**Re-examine policies, practices, and frameworks used in evaluation.**



# FROM EQUITY TO SELF-DETERMINATION: ALLOWING COMMUNITY DESIRE TO DRIVE DECISIONS



Source: A collaboration between [Center for Story-based Strategy](#) & [Interaction Institute for Social Change](#).



## TARGETED UNIVERSALISM

Commitment to bring everyone toward **a co-created universal goal** developed with consideration of the things people would like for themselves and their communities.

*Every group, even those performing well, should be able to access some type of support.*

## WHY

1. Builds belonging without othering.
2. More resilient to backlash.
3. Avoids divisiveness.
4. Moves beyond just closing gaps to create a better standard for **everyone**.



# EQUITABLE EVALUATION FRAMEWORK

## PURPOSE

*Equitable evaluation should assess energy savings and cost-effectiveness in relation to their impact on communities.*

**Engage  
community  
meaningfully**

**Evolve  
attribution with  
historical  
participation**

**Measure  
people-centric  
outcomes**



# MATURITY MODEL FOR IMPACT MEASUREMENT

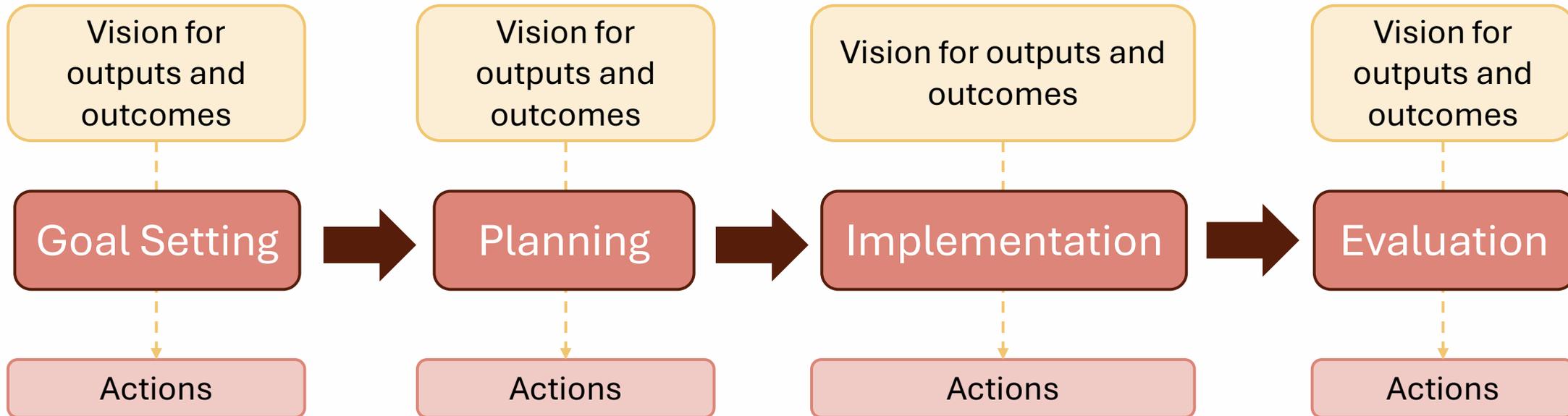


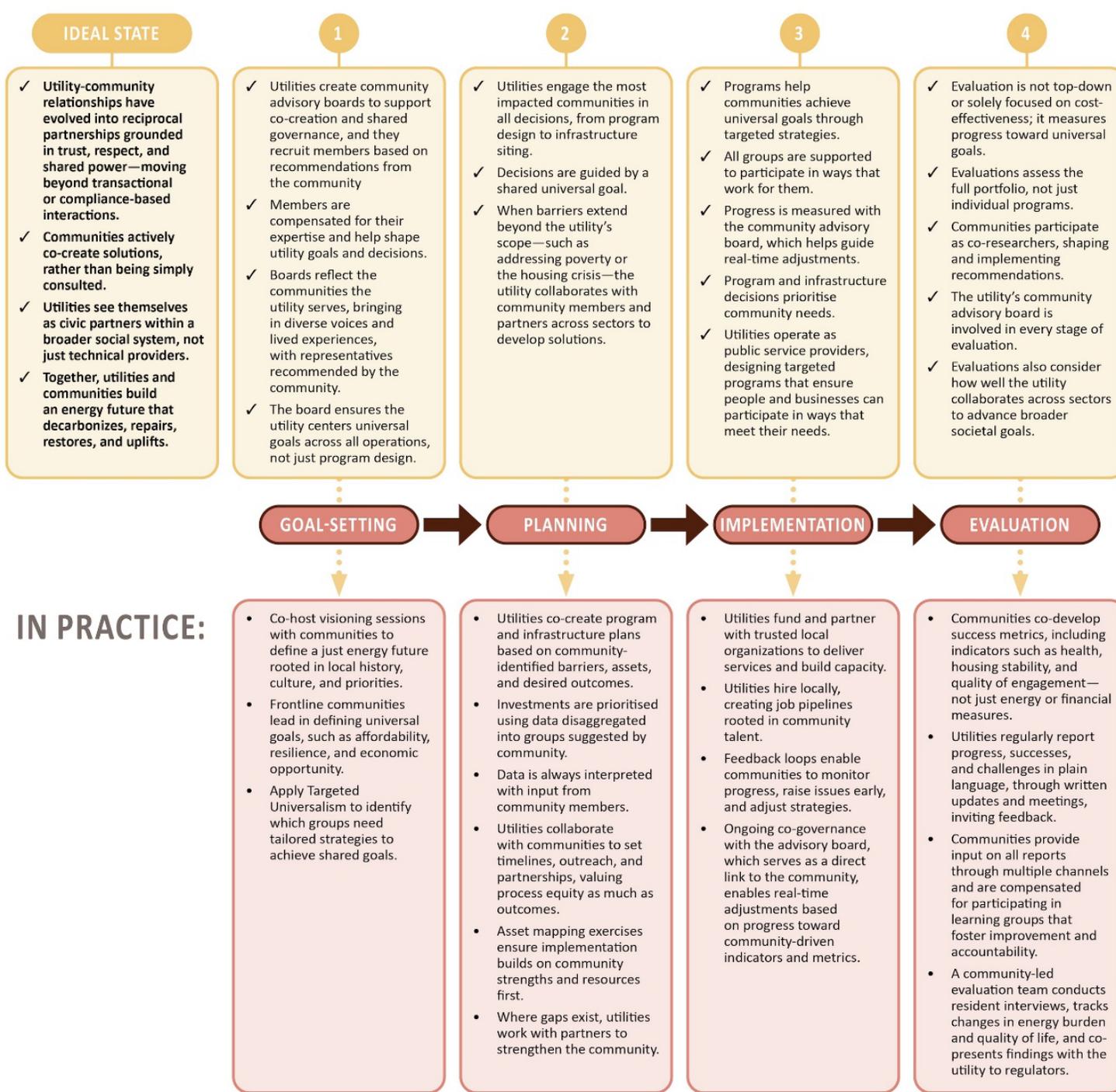
SYSTEMS-CENTRIC —————> PEOPLE-CENTRIC  
 ONLY QUANTITATIVE —————> BLENDS QUANTITATIVE AND QUALITATIVE



# DESIRED FUTURE STATE

## IDEAL STATE





# APPLYING THE FRAMEWORK

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IMPROVING EQUITY IN ENERGY EFFICIENCY EVALUATION 

**GROWING  
EQUITY  
AWARENESS**

**MAKING  
PROCESS  
CHANGES**

**PRACTICING  
TARGETED  
UNIVERSALISM**



# PLANNING

## GROWING EQUITY AWARENESS

- Include “why” & “for whom”
- Understand who has & has not been historically reached
- Community supports engagement

## MAKING CHANGES TO IMPROVE EQUITY

- Objectives reflect community & utility needs
- Scope different activities
- Include budget and timeline to engage community as partners

## PRACTICING TARGETED UNIVERSALISM

- Objectives co-created with community
- Disaggregate data to understand how communities are situated relative to the goal
- Establish research questions with community



# DATA COLLECTION

## GROWING EQUITY AWARENESS

- Remove industry jargon and use language relevant to community
- Understand limitations in approaches that prioritize certain groups over others

## MAKING CHANGES TO IMPROVE EQUITY

- Questions that move past the counterfactual and describe community impact
- Consider different attribution ratios based on participation
- Trust community members with data collection

## PRACTICING TARGETED UNIVERSALISM

- Data collection addresses population-specific barriers
- Culturally relevant tools affirm dignity and agency in how questions are asked
- Community-owned or participatory models



# ANALYSIS

## GROWING EQUITY AWARENESS

- Validate findings with those closest to the outcomes
- Explore how evaluation methods and metrics have overlooked community-defined success

## MAKING CHANGES TO IMPROVE EQUITY

- Combine qualitative and quantitative insights to sharpen conclusions
- Bring community perspectives into interpretation of results through participatory analysis

## PRACTICING TARGETED UNIVERSALISM

- Co-analyze results with community partners
- Translate findings into strategies co-developed with impacted groups



# REPORTING

## GROWING EQUITY AWARENESS

- Understand whose interests are centered
- Share results back to participants with consideration for tone, language, and dissemination channels

## MAKING CHANGES TO IMPROVE EQUITY

- Validate outputs with community before reporting
- Share results in multiple accessible formats
- Include community recommendations
- Provide forums for feedback & dialogue

## PRACTICING TARGETED UNIVERSALISM

- Co-create outputs and recommendations with community
- Offer accountable, equity-centered recommendations that advance progress toward a universal outcome



READ OUR PAPER



THANK YOU



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