

# 2021 Rhode Island Energy Efficiency Equity Working Group Report

Prepared by Green & Healthy Homes Initiative  
for inclusion in  
National Grid's 2022 Annual Plan

September 2021



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September 1, 2021

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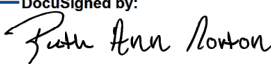
Re: 2021 Rhode Island Energy Efficiency Equity Working Group Report

Dear Chris Porter:

Please find attached to this letter, the Green & Healthy Homes Initiative's 2021 Rhode Island Energy Efficiency Equity Working Group Report (the "Report") prepared for National Grid for inclusion in its 2022 Annual Plan. We would like to thank National Grid and Rhode Island's Office of Energy Resources (OER) for co-hosting the Equity Working Group. In addition, we appreciate the opportunity provided by National Grid to allow GHHI to facilitate the EWG and thank the EWG members and partner organizations for their participation, engagement and feedback throughout the three-month process. I also want to thank Jamal Lewis (project lead) and Margarita Robledo-Guedes for their work in completing this process and the enclosed report.

In response to calls from the Rhode Island advocacy community and its own commitments to equitable delivery of programs, National Grid has embarked on a focused effort to update, develop, implement, and deliver their energy efficiency programs – including through the hosting of the EWG. We are confident that this Report can be a useful tool for National Grid, OER, the advocacy community, the PUC, and many others to continue to work towards an equitable clean energy future for all Rhode Islanders. Through our work in and commitment to the Rhode Island community, we would welcome the opportunity to continue to engage in this important work.

Sincerely,

DocuSigned by:  
  
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Ruth Ann Norton  
President and CEO



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## Executive Summary

National Grid in Rhode Island, as a part of its 2021 Annual Energy Efficiency Program Plan (2021 Annual EE Plan) and 2021-2023 Energy Efficiency Program Plan (2021-2023 EE Plan), committed to working with the Rhode Island (RI) Office of Energy Resources (OER) to co-host an Energy Efficiency Equity Working Group (EWG). The objective of the EWG was to provide National Grid with recommendations on incorporating equity in the planning, design, and delivery of its future RI Energy Efficiency Programs. More information on National Grid's current programs can be found on [National Grid's website](#) or in National Grid's [Three-Year Plan and 2021 Annual Plan filing](#).

The EWG was comprised of twenty-six people representing diverse organizations and personal backgrounds. Green & Healthy Homes Initiative facilitated the EWG meetings. There were six meetings held over four months (May 2021-August 2021): an introductory meeting, four topic-specific meetings (marketing and outreach, metrics and data collection, workforce development and training, and program budgets), and a final wrap-up meeting. The goal of each topic-specific meeting was for EWG members to discuss and recommend strategies that could significantly impact the equitable delivery of the Energy Efficiency Programs. Each of the top fourteen recommendations that emerged from the topic-specific meetings were compiled into one list and EWG members then voted for the overall top five priority recommendations:

1. Hire multilingual staff and partner with trusted leaders who have the same ethnic background and that frequent popular community gathering places such as community centers and faith-based organizations. Potential partnerships can include 1) working with YMCA's, senior centers, schools and universities, or other community organizations to provide program information at an event they are hosting, 2) co-hosting events in partnership with community organizations, 3) sponsoring events or efforts that help to meet other community needs such as a food drive or trash pick-up, or 4) partnering with trade associations or career centers to host trainings and job fairs.
2. Benchmark Energy Efficiency Program participation data for race, geography, socioeconomic status, language, age of home, age of owner, age of renter, heating fuel type, type and age of heating /hot water/cooling systems.
3. Develop multilingual marketing and outreach materials. Use accessible language to target audiences in each publication.
4. Partner with other home visiting programs to expand the reach and impact of National Grid's energy efficiency programs. Home visitors as part of visiting programs are typically discussed in a healthcare context and can include nurse case managers, occupational and physical therapists, home-based healthcare nurses, travelling doctors or physicians, and case workers. Partnering with these individuals or entities can include 1) offering trainings so that home visitors can identify potential beneficiaries of energy efficiency programs and make referrals into National Grid's programs 2) incentivizing home visitors to educate their clients on energy efficiency and refer their clients into energy efficiency programs 3) co-hosting outreach and marketing events that cover health- and energy-related topics 4) targeting energy efficiency programs, energy bill

assistance, and heating or cooling assistance at high-risk households that often have medical conditions that cause them to have health-based home visitors.

5. Reduce barriers to professional development as well as entry into the workforce. This can include 1) helping to pay for, or support employees in paying for, necessary trainings for interested individuals 2) investing in building new, accessible training centers in underserved communities, particularly in cases where the closest training center is out of state 3) incentivizing certified trainers to host more frequent trainings in different parts of the state, particularly in underserved areas 4) helping to create on-the-job training programs to allow trainees to get necessary and valuable experience 5) providing upfront seed capital to foster the creation of more minority- or women-owned businesses by covering costs for tools, trucks, and supplies as well as operating investments for costs such as liability insurance 6) potentially paying off student loans of energy efficiency workers to reduce economic burden 7) sponsor other professional development and skills trainings to allow workers to build competencies in other areas that enable expansion of work into new fields.

The top fourteen recommendations that emerged from the marketing and outreach, metrics and data collection, and workforce development and training meetings are listed below and include the prioritized recommendations listed above. EWG group members voted from this list to get the top five prioritized recommendations (listed above) during the Program Budgets meeting.

- Develop multilingual marketing and outreach materials. Use accessible language to target audiences in each publication.
- Hire multilingual staff and partner with trusted leaders who have the same ethnic background and that frequent popular community gathering places such as community centers and faith-based organizations.
- Include in the messaging that National Grid is not code enforcement so residents can feel more comfortable.
- Develop age-appropriate marketing strategies to connect with various age groups that live in a household such as utilizing social media, apps, and text messaging to reach new audiences and help engage customers with their energy usage.
- Partner with other home visiting programs to expand the reach and impact of National Grid's energy efficiency programs.
- Allocate a proportion of Energy Efficiency marketing budgets to municipalities for mailing energy efficiency materials; some municipalities use third parties for mailing.
- Provide incentives to community groups that are serving vulnerable populations.
- Develop a mechanism that allows participation or action to occur immediately after the marketing step.
- Benchmark Energy Efficiency Program participation data for race, geography, socioeconomic status, language, age of home, age of owner, age of renter, heating fuel type, type, and age of heating /hot water/cooling systems.
- Track late payments and shut offs.
- Align energy efficiency programs with healthcare and partner to achieve healthcare goals, promote further engagement, and sharing health outcome and impact data.

- Perform a full review of all HR policies and remove outdated policies that restrict hiring such as background checks.
- Reduce barriers to professional development, as well as entry into the energy efficiency workforce.
- Collaborate with local diverse community organizations to train and certify potential workers (Progreso Latino, Hispanic chamber of commerce, cape Verdean community development).

The following list represents additional recommendations that were discussed during each topic-specific meeting but did not rise to the top during the voting for that meeting. These recommendations were harvested from the brainstorming platform, kept in their original form and language, and can be viewed as direct quotes.

- Marketing and Outreach
  - o Help customers use apps in their own language to manage/see their energy use – teach customers how to use these apps.
  - o Reach people in a way that’s exciting and will not feel triggering or disappointing – find ways to distinguish energy efficiency outreach from bills.
  - o Publicly benchmark and label energy usage.
  - o Utilize billboards that can be seen by many on the highway.
  - o Utilize lawn signs.
  - o Produce information in brail for vision impaired and ASL for hearing impaired.
  - o Utilize clear marketing that energy efficiency is a benefit and will be easy.
  - o Explore different ways that people get news and information and use those channels to try to reach and engage as many people as possible.
  - o Target outreach to individuals who need the assistance to reduce costs and improve quality.
  - o Create materials that appeal to a variety of skills and abilities; reach the customer where they are.
  - o Tailor the message to community/needs/concerns priorities.
- Metrics and Data Collection
  - o Track customer preferred language and contractor language capacity.
  - o Align workforce with the race, ethnicity, and language of the customer base.
  - o Incorporate six dimensions of equity metrics from the Urban Institute publication “[The State of Equity Measurement](#)”<sup>1</sup>.
  - o Advance enhanced data sharing with community action programs.
- Workforce Development and Training
  - o Work to ensure there are more local BPI testing centers and increased capacity for testing and training.

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<sup>1</sup> Martin C, Lewis J. *The State of Equity Measurement: A Review for Energy Efficiency Programs*. The Urban Institute; 2019. [https://www.urban.org/research/publication/state-equity-measurement/view/full\\_report](https://www.urban.org/research/publication/state-equity-measurement/view/full_report)

- Incentivize diversity in program workforce (Recognize that diversity in the workforce is valuable to the programs – National Grid should be willing to pay for this).
- Create internships for residents of Environmental Justice (EJ) communities to join the energy workforce.
- Make industry standards regarding pay/wages – National Grid could do a rate scale analysis to help support pay that attracts and retains diverse individuals.
- Provide financial support for retention (maybe a retainment bonus could be provided).
- Develop a Rhode Island energy job board that could include both policy and trades.
- Partner with grade schools in environmental justice communities to promote math and science at early ages.
- Coordinate the joint development of training with organizations and individuals that are conducting workforce development training in their respective communities.
- Reassess and make changes to streamline certification processes for BPI and other energy efficiency related certifications.
- Standardize programs and offerings so that they are easy to braid together.
- Offer more incentives for staff – rental assistance, work/life balance, bonuses, paid apprenticeships.
- Offer workshops for businesses in environmental justice communities to learn how to become an official National Grid vendor.

Using the EWG’s top fourteen recommendations, National Grid proposed specific actions to include in the 2022 Annual Plan that would enhance their energy efficiency programs. A table of the proposed actions can be found in National Grid’s 2022 Annual Plan. These proposed actions were presented to the EWG and discussed during the final meeting. Generally, EWG members were supportive of the proposed actions. There were some proposed actions, for which some EWG members had additional feedback. In addition, during the final meeting, EWG members debriefed the six EWG meetings and discussed the potential future of the EWG. All EWG members found the EWG meetings and process to be valuable and almost all EWG members thought that EWG meetings should continue beyond this initial phase with the purpose of tracking implementation of each proposed action and making further recommendations to National Grid. As one of the proposed actions, National Grid proposed to continue convening the EWG once a quarter.

## Background/Introduction

National Grid, as a part of its 2021 Annual Energy Efficiency Program Plan (2021 Annual EE Plan) and 2021-2023 Energy Efficiency Program Plan (2021-2023 EE Plan), committed to working with the Rhode Island Office of Energy Resources (OER) to co-host an Energy Efficiency Equity Working Group (EWG). The EWG was envisioned to 1) be comprised of representatives from state agencies, community-based organizations, advocacy organizations, and local subject matter experts in equity; 2) provide a space where the voices and concerns of impacted communities could inform discussions on equity issues; 3) identify areas of importance and focus around issues of equity for the energy efficiency programs; and 4) be a resource in the development of future Annual and Three-Year Energy Efficiency Plans, alongside related evaluation efforts. The desired deliverable from the EWG was to provide National Grid with written recommendations to advance equity in the planning, design, and delivery of its Energy Efficiency Programs. National Grid would then use these recommendations to propose the elimination of or alteration of current programs or development of new programs or services that would help to better serve National Grid's diverse customer base. More information on National Grid's current programs can be found on [National Grid's website](#) or in National Grid's [Three-Year Plan and 2021 Annual Plan filing](#).

In May 2021, National Grid contracted with the Green & Healthy Homes Initiative (GHHI) to facilitate the development and implementation of the EWG. GHHI is a national non-profit organization dedicated to addressing the social determinants of health and the advancement of racial and health equity through the creation of healthy, safe, and energy efficient homes. GHHI has a local Rhode Island office that works to coordinate federal, state, and philanthropic resources to develop programming, in partnership with state and local municipalities and nonprofits, that provides low-income Rhode Island residents with integrated energy efficiency, health, and safety housing retrofit programs. More information on GHHI can be found in the Appendix.

Given the desire to have the EWG recommendations inform and be included in National Grid's 2022 Annual Plan, GHHI committed to a quick timeline for recruiting EWG members, facilitating the EWG meetings, and finalizing recommendations by the end of August 2021. Within this timeline, GHHI proposed to host six EWG meetings between June 8<sup>th</sup> and August 26<sup>th</sup>.

## Methodology

### Equity working group member recruitment

During the month of May, GHHI recruited EWG members based on three factors: The original vision of the EWG outlined in the Annual and Three-Year Plans; internal GHHI connections and partnerships; and feedback and suggestions from National Grid, OER, and other key players in the Rhode Island energy efficiency field. Our intent was to achieve the following key objectives:

- 1) prioritize individuals and organizations that had experience and expertise in providing services – or designing and implementing policies that support services – that benefit residents of underserved and under-resourced communities, particularly limited income households, Black and Brown residents, and other communities served by National Grid's programs

- 2) add perspectives that have not traditionally been heard in energy efficiency proceedings or policy and program advocacy and



3) support diversity including, but not limited to, gender, race, economic status, and geography to ensure that EWG members represented a wide range of perspectives.

We recognize that our approach to EWG member recruitment was limited and may not have resulted in as diverse a group as possible. Nonetheless, we do believe that the EWG included individuals and organizations that provide services to underserved and under-resourced communities, represented voices that have not been traditionally engaged in energy efficiency planning, and was comprised of a diverse group of perspectives. The list of EWG members is included below.

- Amy Vavak, National Grid (co-host)
- Becca Trietch, Rhode Island Office of Energy Resources (co-host)
- Margarita Robledo-Guedes, GHHI Rhode Island
- Jamal Lewis, GHHI Rhode Island (facilitator)
- Brenda Clement, HousingWorks RI at RWU
- Rachal Calabro, Rhode Island Department of Health
- Jeanne Cola, LISC Rhode Island Health Equity Zone (Pawtucket/Central Falls)
- Jennifer Wood, Center for Justice
- Kathy McCabe, McCabe Enterprises
- Tony Hubbard, Youth Build Preparatory Academy
- Laura Rodormer, National Grid (co-host)
- Joel Munoz, Rhode Island Division of Public Utilities
- Stacy Wasserman, Rhode Island Housing
- Garry Bliss, Prospect CharterCare
- John Marcantonio, Rhode Island Builders Association
- Rilwan Feyisitan Jr., Community Action Partnership of Providence
- Rob Hart, City of Providence
- Elizabeth Moreira, City of Pawtucket
- Emily Freedman, City of Providence

In addition, there were several organizations and individuals that did not participate in the EWG meetings but that still wanted the opportunity to provide feedback on National Grid programs. GHHI had one-on-one meetings with these organizations and individuals, who offered additional recommendations based on their experiences. More information on these meetings can be found in the Appendix.

### [Equity working group meeting timeline and topics](#)

GHHI facilitated six EWG meetings. The first meeting was an introductory meeting with the intention of creating space for EWG members to get to know each other and to level-set with a basic presentation of National Grid's Energy Efficiency Programs and the regulatory environment in which National Grid's Energy Efficiency Programs operate. The second, third, fourth, and fifth meetings were focused on distinct areas within the Energy Efficiency Programs: marketing and outreach; metrics and data collection; workforce development and training; and program budgets, respectively. The goal of meetings 2-5 was to ultimately present recommendations to inform the long-term direction of National Grid's Energy Efficiency Programs and include short term actions that National Grid could include in its 2022 Annual Plan. The last meeting served as a chance to finalize and prioritize the recommendations from each of the previous meetings. Each meeting was facilitated using the same guidelines and expectations, which can be found listed in the Appendix. The comprehensive meeting schedule is described below.

| Timeline and Meeting Topics  |  |  |  |
|--|--|--|--|
| May  | June   | July   | August   |
| <ul style="list-style-type: none"> <li>Equity working group recruitment</li> </ul> | <ul style="list-style-type: none"> <li>Equity working group recruitment</li> <li>Introductory meeting</li> <li>Second meeting: marketing and outreach</li> </ul> | <ul style="list-style-type: none"> <li>Equity working group recruitment</li> <li>Third meeting: metrics and data collection</li> <li>Fourth meeting: workforce development and training</li> </ul> | <ul style="list-style-type: none"> <li>Fifth meeting: program budgets</li> <li>Sixth meeting: finalize and prioritize recommendations</li> </ul> |

### Methodology for determining top recommendations

As mentioned above, the objective of the EWG was to offer National Grid recommendations to advance equity in the planning, design, and delivery of its Energy Efficiency Programs. For meetings 2-5, which featured voting, EWG members discussed and presented recommendations and then individually voted (via MURAL and PollEverywhere) on the recommendations they determined would have the most significant impact on equity pertaining to the RI Energy Efficiency Programs. The top recommendations were determined by the highest number of votes. Specifically, if the highest number of votes were four, six, and seven votes (i.e., all other recommendations received less than four votes), then all of the recommendations that received four, six, or seven votes would be included as a top recommendation. Continuing this example, if two recommendations received seven votes, five recommendations received six votes, no recommendation received five votes, and three recommendations received four votes, then all ten recommendations would be included in the top recommendations. In each of the sections below, the recommendations are split into top recommendations and other recommendations. The other recommendations represent ideas that surfaced during the brainstorming but did not receive enough votes to be considered a top recommendation.

### Additional considerations

There are several additional considerations that might be helpful to consider when attempting to understand this report or the efforts of the EWG.

1. Many energy efficiency program administrators, regulators, and staff across the country are attempting to improve the advancement of equity in the respective programs and, as of the writing of this report, there is no widespread consensus on the best way to define and/or promote equity in energy efficiency programs. There are several national initiatives<sup>2</sup> that were

<sup>2</sup> The American Council for an Energy Efficiency Economy (ACEEE) launched the [Leading with Equity Initiative](#) in January 2021, designed to convene community-based organizations, advocates, and utilities to jointly define success for equitable decarbonization, and then work to embed metrics that match this definition in ACEEE's

created prior to the start of this EWG that are working to build a baseline understanding of this topic and develop standardized metrics to track and measure equity in energy efficiency programs.

2. Equity is a complex and dynamic term that can vary in meaning depending on the context. [A 2019 report published by the Urban Institute](#)<sup>3</sup> attempts to articulate these nuances. The report outlines four underlying concepts that may be important when defining equity.
  - a. Equity is historical parity, not just current equality, which means that equity should be viewed as an ongoing process and not a single goal with an endpoint.
  - b. Equity is measured for specific populations – including protected classes or groups with shared characteristics – for whom there is a relevant and reasonable past or current disparity in treatment. This means that equity could, and probably does, have different meanings depending on the perspective.
  - c. Equity is multifaceted and cannot be reduced to a single construct, which means that there is no single metric that can fully capture the nuances of equity.
  - d. Equity can and should be measured for each component along an intervention: development, implementation, quality, and outcome.
  
3. The implementation of the EWG in the summer of 2021 occurred on the heels of a nationwide, and arguably global, awakening that resulted in a majority of Americans understanding that racism and racial inequities exist in many facets of American society.<sup>4</sup> After the murder of George Floyd on May 25<sup>th</sup>, 2020, many Americans demanded action to promote equity and justice and many companies and organizations responded with statements and commitments to combat racism and racial injustice with their platforms.<sup>5,6,7,8</sup> And, President Biden made racial justice a pillar of his presidency with the announcement of Executive Order 13985, which directed federal agencies to, among other things, identify methods of assessing equity, conduct

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utility, state, and city scorecards. In May 2021, the Urban Energy Justice Lab at the University of Michigan School for Environmental and Sustainability launched the [Energy Equity Project](#) with the goal of creating a framework for measuring equity across energy efficiency and clean energy programs among utilities, state regulatory agencies, and other practitioners, while engaging and centering BIPOC and frontline communities.

<sup>3</sup> Martin C, Lewis J. *The State of Equity Measurement: A Review for Energy Efficiency Programs*. The Urban Institute; 2019. [https://www.urban.org/research/publication/state-equity-measurement/view/full\\_report](https://www.urban.org/research/publication/state-equity-measurement/view/full_report)

<sup>4</sup> Mallory Newall, Sara Machi. White and Black Americans far apart on racial issues. *Ipsos*. <https://www.ipsos.com/en-us/news-polls/npr-racial-inequality-issues>.

<sup>5</sup> Alex Altman. Why The Killing of George Floyd Sparked an American Uprising. *TIME*. Published online June 4, 2020. <https://time.com/5847967/george-floyd-protests-trump/>

<sup>6</sup> Chauncey Alcorn. George Floyd's death was a wake-up call for Corporate America. Here's what has — and hasn't — changed. *CNN Business*. <https://www.cnn.com/2021/05/25/business/corporate-america-anti-racism-spending/index.html>. Published May 25, 2021.

<sup>7</sup> Levi Sumagaysay. Companies that declared solidarity after George Floyd killing may be 'woke washing,' shareholder advocates warn. *MarketWatch*. <https://www.marketwatch.com/story/companies-that-declared-solidarity-after-george-floyd-killing-may-be-woke-washing-shareholder-advocates-warn-11621960301>. Published May 29, 2021.

<sup>8</sup> Emma Whitford. Going Behind the Rhetoric. *Inside Higher Ed*. August 5, 2021. <https://www.insidehighered.com/news/2021/08/05/naspa-report-examines-statements-wake-george-floyds-murder>

an equity assessment in federal agencies, allocate federal resources to advance fairness and opportunity, and engage with members of underserved communities.<sup>9,10</sup> This is all to say that there are many people across the country attempting to take actions to advance and promote equity, National Grid included.

4. The EWG is intentionally made up of members with varying understanding of – and expertise in – equity, National Grid’s Energy Efficiency Programs, and general energy efficiency. Therefore, it is possible that EWG members have made recommendations that National Grid has already implemented. This scenario should not be viewed as an attack on National Grid or any of its implementation partners nor should it be viewed as a confirmation that National Grid’s programs are currently equitable. All recommendations should be viewed as ways that the EWG members believe National Grid can act to improve the advancement of equity within its programs – whether these recommendations are already being implemented or not.
  
5. Separate from the EWG process, National Grid hired the Cadeo Group to conduct two market studies: a Participation and Multifamily Census Study and a Nonparticipant Market Barriers Study. The Participant and Multifamily Census Study was designed to assess, document, and analyze historical participation – and, relatedly, nonparticipation – in National Grid Rhode Island’s residential energy efficiency programs between 2016 and 2020 and to create a comprehensive database (or as close to comprehensive as possible) of the multifamily (MF) buildings in Rhode Island that includes building characteristics and an indicator of whether each building has participated in a National Grid efficiency program. This Participant study relies on existing National Grid data to develop profiles for participants of National Grid programs. The Nonparticipant Market Barriers Study is designed to provide in-depth research to characterize customers that have not participated in National Grid Rhode Island’s residential programs, assess barriers to their participation, and identify opportunities to engage them. This Nonparticipant study utilizes surveys to understand why certain customers do not participate in National Grid’s programming. On June 23<sup>rd</sup>, the EWG provided feedback on Nonparticipant Market Barriers Study Work Plan. Both National Grid market studies and the EWG process are complementary to National Grid’s goals of serving its diverse customer base in the most equitable way.

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<sup>9</sup> Executive Office of the President. *Advancing Racial Equity and Support for Underserved Communities Through the Federal Government.*; 2021. <https://www.federalregister.gov/documents/2021/01/25/2021-01753/advancing-racial-equity-and-support-for-underserved-communities-through-the-federal-government>

<sup>10</sup> The White House Briefing Room. Executive Order On Advancing Racial Equity and Support for Underserved Communities Through the Federal Government. Published January 20, 2021. <https://www.whitehouse.gov/briefing-room/presidential-actions/2021/01/20/executive-order-advancing-racial-equity-and-support-for-underserved-communities-through-the-federal-government/>

## Meeting Discussions and Recommendations

### Introductory Meeting

On June 8<sup>th</sup>, 2021, the EWG had its first meeting. The intended goals of this meeting were to 1) provide space for EWG members to get to know each other, 2) level-set the group’s understanding of National Grid’s Energy Efficiency Programs and the regulatory environment in which these programs exist, 3) build a shared understanding of how the group wanted to define equity in the context of energy efficiency, and 4) ensure that participants understood that the EWG was designed to provide National Grid with recommendations on equity for the planning, design and delivery of its Energy Efficiency Programs.

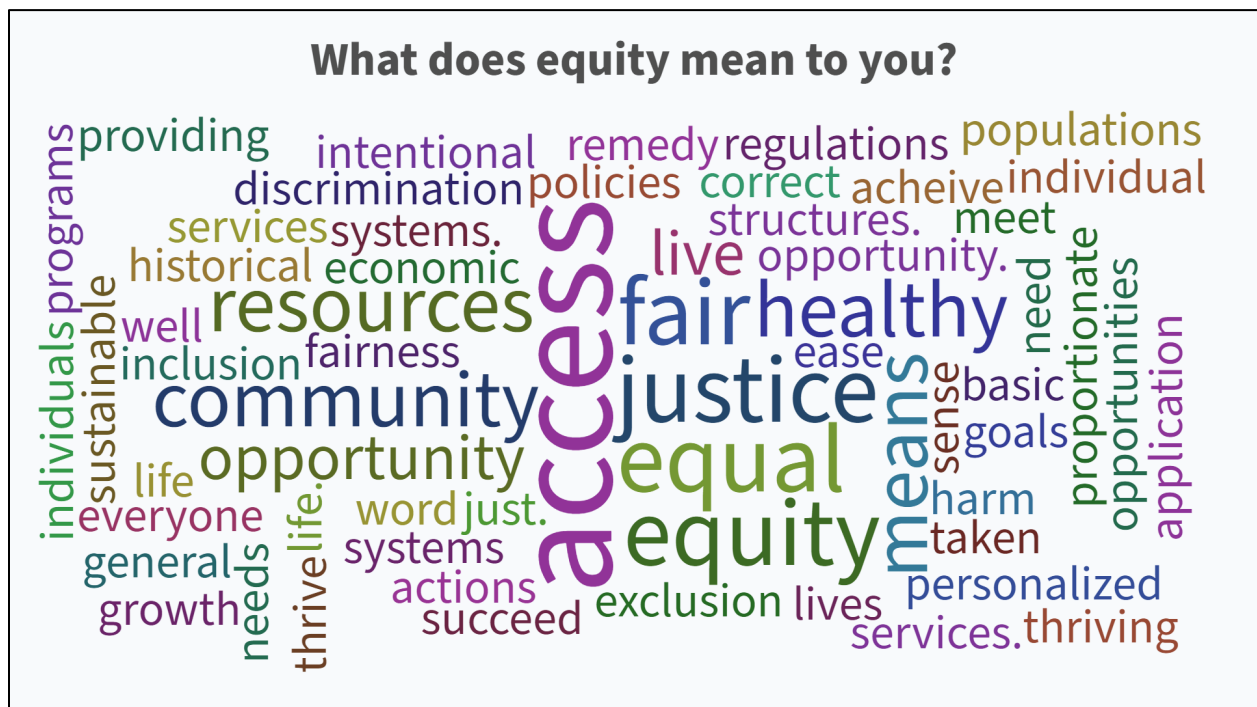
The meeting began with a large group ideation session to define equity in the context of this project. Through an interactive exercise where EWG members submitted their individual definition and/or perception of equity, the following word-cloud image was created. To add additional context into the defining equity exercise, here are some quotes from the meeting that are examples of how the EWG members describe equity.

“Intentional actions taken to remedy and correct historical exclusion, discrimination, and harm in policies, systems and structures.”

“For me, it was three words. Fair, impartial, and opportunity.”

“Justice and community.”

**Initial EWG Exercise** – Individual definitions and/or perceptions of equity.



The next part of the meeting featured a presentation by National Grid introducing the RI Energy Efficiency Programs and the regulatory context in which those programs operate. Topics of the presentation included 1) the program planning process, 2) the list of, and budget for, the energy efficiency programs that National Grid administers including the breakdown of in-home programs, retail programs, and customer behavior and education programs, 3) the benefits and larger impact of these programs such as energy savings, gross domestic produce (GDP) impact, greenhouse gas emissions reduction, and the jobs impact, and 4) relevant third-party evaluation, measurement, and verification (EMV) studies including the Participant and Multifamily Census study and the Non-Participant Market Barrier study, which are occurring simultaneously to this EWG process.

### Marketing and Outreach Meeting

On June 23<sup>rd</sup>, 2021, the EWG met to discuss equitable marketing and outreach. The goal of this meeting was to create a prioritized list of action-oriented recommendations that can improve the way that National Grid markets and performs outreach for their energy efficiency programs.

The first part of the discussion centered around defining equitable marketing and outreach. By and large, participants broadly described equitable marketing and outreach as the ability to provide access to the people who need it most, who would have never otherwise thought about energy efficiency, and who need to be proactively encouraged to participate in the programs. Some participants indicated the importance of targeted messaging utilizing specialized and accessible mediums that meet people where they are and appeal to community needs, concerns, and priorities. Every community should be able to receive and understand marketing material that highlights and provides information on National Grid's programs. Equitable marketing and outreach initiatives go the extra mile to explore and implement outreach strategies that ensure every community is able to receive and understand program information.

### Top recommendations

- Develop multilingual marketing and outreach materials. Use accessible language to target audiences in each publication.
- Hire multilingual staff and partner with trusted leaders who have the same ethnic background and that frequent popular community gathering places such as community centers, faith-based organizations, etc.
- Include in the messaging that National Grid is not code enforcement so residents can feel more comfortable.
- Develop age-appropriate marketing strategies to connect with various age groups that live in a household such as utilizing social media, apps, and text messaging to reach new audiences and help engage customers with their energy usage.
- Partner with other home visiting programs to expand the reach and impact of National Grid's energy efficiency programs.

- Allocate a portion of Energy Efficiency marketing budgets to municipalities for mailing energy efficiency materials; some municipalities use third parties for mailing.
- Provide incentives to community groups that are serving vulnerable populations.
- Develop a mechanism that allows participation or action to occur immediately after the marketing step.

#### Additional recommendations

- Help customers use apps in their own language to manage and see their energy use – teach customers how to use these apps.
- Reach people in a way that’s exciting and will not feel triggering or disappointing – find ways to distinguish energy efficiency outreach from bills.
- Publicly benchmark and label energy usage.
- Utilize billboards that can be seen by many on the highway.
- Utilize lawn signs.
- Produce information in brail for vision impaired and ASL for hearing impaired.
- Utilize clear marketing that energy efficiency is a benefit and will be easy.
- Explore different ways that people get news and information and use those channels to try to reach and engage as many people as possible.
- Target outreach to individuals who need the assistance to reduce costs and improve quality.
- Create materials that appeal to a variety of skills and abilities; reach the customer where they are.
- Tailor the message to community, needs, concerns, and priorities.

#### Metrics and Data Collection

On July 14<sup>th</sup>, 2021, the EWG met to discuss measuring and analyzing program data determined to represent equity indicators. The goal of this meeting was to create a prioritized list of metrics and data that National Grid should consider in assessing how equitably their energy efficiency programs are delivered.

In recent years, there has been a shift to better understand how energy efficiency programs can be more equitable. Despite the existence of programs that serve low- and moderate-income households, there is an increasing realization that the benefits of energy efficiency may not reaching those who can most benefit from the services. Several efforts<sup>11</sup> including the [Energy Equity Project](#), housed at the Urban Energy Justice Lab at the University of Michigan’s School for Environment & Sustainability, and the American Council for an Energy-Efficient Economy’s (ACEEE) [Leading with Equity Initiative](#) have

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<sup>11</sup> The American Council for an Energy Efficiency Economy (ACEEE) launched the [Leading with Equity Initiative](#) in January 2021, designed to convene community-based organizations, advocates, and utilities to jointly define success for equitable decarbonization, and then work to embed metrics that match this definition in ACEEE’s utility, state, and city scorecards. In May 2021, the Urban Energy Justice Lab at the University of Michigan School for Environmental and Sustainability launched the [Energy Equity Project](#) with the goal of creating a framework for measuring equity across energy efficiency and clean energy programs among utilities, state regulatory agencies, and other practitioners, while engaging and centering BIPOC and frontline communities.

begun a process of developing and incorporating new metrics that will enable energy efficiency programs to better measure equity. To ground the discussion in some of this broader context, participants were sent an [article](#)<sup>12</sup> that discussed the importance of data in promoting energy equity.

We began the conversation with a broad prompt: How do you/would you measure equity in your own programs? Some participants offered some perspective from their own work, including the desire to track and measure the equity impact of their programs and the recognition that collecting and analyzing data is an important part of determining a baseline and improving program services in a way that continuously gets better at advancing equity. One commenter stated that while collecting perfect data is the goal, we ought to not spend our entire life waiting for perfect data before we act; there are things we can do now, and we should do them simultaneously. Other participants mentioned the importance of collecting demographic information and analyzing program outcomes by these demographics including race.

Next, the conversation shifted to be more focused on measuring equity in energy efficiency programs. Given the wide range of experience with energy efficiency, GHHI and National Grid presented some slides with the goal of getting each participant to a similar baseline of knowledge and understanding. GHHI presented a slide on its 2019 report, co-published with the Urban Institute, called [The State of Equity Measurement: A Review for Energy-Efficiency Programs](#)<sup>13</sup>, which offers a framework for how to think about measuring equity within energy efficiency programs. This report has been cited as a useful resource on the topic of energy equity and measurement. National Grid then presented a few slides on its current metrics and data collection practices so participants could understand what National Grid currently measures. After these presentations, participants moved into breakout groups to discuss questions related to metrics and data that National Grid should consider adopting to measure equity more effectively.

In these breakout groups, participants offered perspectives on how they would measure whether equity is being achieved through energy efficiency programs. There were largely two components of programs that participants described as being important: Equity in program delivery and equity in program impact. To assess equity in program delivery, participants mentioned tracking detailed demographics such as race, language, geography, and family size as well as information on vulnerable individuals and communities such as older adults, people with special healthcare needs, and historically excluded, underserved, or under-resourced communities. Evaluating equity in program impact means tracking and collecting data on household energy burden as well as other non-energy impacts. Given that energy efficiency can improve environmental quality and household occupant health outcomes, participants noted that tracking health impacts can be a way to understand how these benefits are being distributed. A few participants noted the importance of building trust in communities so that program participants could feel comfortable sharing data. Communicating the goal of data collection and partnering with community leaders and faith-based organizations represent some examples of ways to build trust. Ultimately, EWG participants noted the importance of meeting households and businesses where they

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<sup>12</sup> Robert Walton. Energy equity depends on data, and experts say there isn't enough of it. *Utility Dive*. July 8, 2021. [Energy equity depends on data, and experts say there isn't enough of it | Utility Dive](#)

<sup>13</sup> Martin C, Lewis J. *The State of Equity Measurement: A Review for Energy Efficiency Programs*. The Urban Institute; 2019. [https://www.urban.org/research/publication/state-equity-measurement/view/full\\_report](https://www.urban.org/research/publication/state-equity-measurement/view/full_report)



are with program resources to create pathways for everyone to participate. These conversations led to the recommendations listed below.

#### Top recommendations

- Benchmark Energy Efficiency Program participation data for race, geography, socioeconomic status, language, age of home, age of owner, age of renter, heating fuel type, type and age of heating /hot water/cooling systems.
- Track late payments and shut offs.
- Align energy efficiency programs with healthcare and partner to achieve healthcare goals, promote further engagement, and sharing health outcome and impact data.

#### Additional recommendations

- Track customer preferred language and contractor language capacity.
- Align workforce with the race, ethnicity, and language of the customer base.
- Incorporate six dimensions of equity metrics from the Urban Institute publication "[The State of Equity Measurement](#)"<sup>14</sup>.
- Advance enhanced data sharing with community action programs.

#### Workforce Development and Training

On July 27<sup>th</sup>, 2021, the EWG met to discuss equitable workforce development and training. The goal of this meeting was to identify gaps and barriers that exist, and which prevent the development of a diverse workforce prepared to serve an equally diverse customer base, and to develop solutions to overcome these challenges.

The meeting began with a poll to understand the types of perceived jobs that exist in the energy efficiency workforce and to explore what an equitable and diverse workforce looks like. Below are two word clouds that illustrate participants' answers.

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<sup>14</sup> Martin C, Lewis J. *The State of Equity Measurement: A Review for Energy Efficiency Programs*. The Urban Institute; 2019. [https://www.urban.org/research/publication/state-equity-measurement/view/full\\_report](https://www.urban.org/research/publication/state-equity-measurement/view/full_report)



participants continued to discuss challenges and barriers to achieving a more diverse energy efficiency workforce and brainstormed actionable recommendations that National Grid can advance within the scope of its work.

The panel discussion and the breakout groups covered a variety of topics and highlighted several important points. It was brought up that by and large there is a shortage of workers that are trained and certified to perform energy efficiency services. It should also be noted that given the nature of the panelists and the EWG members that are close to workforce, most of the discussion centered around the workforce required to perform in-home weatherization and energy efficiency services. Given the overall shortage of workers, there is a culture of competition among different community action program (CAP) agencies and energy auditor and contractor firms that leads some to offer more competitive wages and other benefits to attract qualified applicants. While competitive wages and attractive benefits are ultimately good for applicants, firms continue to have a hard time retaining their employees. In addition, the shortage of workers is exacerbated by 1) the lack of people interested in learning trades, 2) barriers within National Grid's internal hiring and contractor on-boarding process, and 3) the amount of time and resources needed to train and certify interested applicants. Some participants noted that the requirement for applicants to have a background check has prevented some interested applicants from being able to be hired to work on National Grid contracts. Other participants noted that once they get an applicant that is interested and passes National Grid's background check, among other things, there is a need to make sure that these individuals are trained and certified to work on federal contracts, which all of the CAP agencies also administer. The training centers that provide the necessary certifications are also not easily accessible, with many existing out of the state, taking up to a full week to complete, and offering classes infrequently (only offered twice a year) with a limited number of available spots. So, for example, a new energy auditor hire may have to wait up to six months to be trained and certified before they are able to perform an audit on their own.

One participant also noted the presence of tension between contractor firms and CAP agencies with funders like National Grid. For example, CAP agencies and their subcontracted contractors, who enter client homes, often administer or provide services for multiple programs in addition to energy efficiency. So, when they enter homes for an energy audit, auditors are often looking for other issues like food insecurity, which can be helped by referring the family into other programs also administered by the CAP agency. This is sometimes in contradiction with energy efficiency funders like National Grid, who value and push for maximized unit production. Another example that illustrates competing priorities is one that was exacerbated by COVID-19. In-home energy efficiency services, which require workers to enter the home of a client to perform an audit or install new equipment, directly threatened the health and safety of energy efficiency workers. Some CAP agencies paused their services to protect their staff, which could be seen as contradictory to the goal of maximized unit production in energy efficiency programs.

Other barriers to developing and maintaining a diverse energy efficiency workforce include economic barriers such as low wages, high upfront costs, and access to credit to cover training costs, equipment purchases, and startup costs for firms; delays in payment from program administrators like National Grid and the State government; lack of awareness and availability of job and professional development opportunities; and other barriers such as childcare and transportation.

Based on these barriers, EWG participants, as well as the panelists that joined for this meeting, brainstormed the following recommendations for ways that National Grid can take action to help develop and maintain a diverse energy efficiency workforce.

### Top Recommendations

- Perform a full review of all HR policies and remove outdated policies that restrict hiring such as background checks
- Reduce barriers to professional development, as well as entry into the energy efficiency workforce.
- Collaborate with local diverse community organizations to train and certify potential workers (Progreso Latino, Hispanic Chamber of Commerce, Cape Verdean Community Development of RI)

### Additional recommendations

- Work to ensure there are more local BPI testing centers and increased capacity for testing and training
- Incentivize diversity in program workforce (Recognize that diversity in the workforce is valuable to the programs – National Grid should be willing to pay for this)
- Create internships for residents of Environmental Justice (EJ) communities to join the energy workforce
- Make industry standards regarding pay/wages (i.e., National Grid could conduct a rate scale analysis to help support pay that attracts and retains diverse individuals)
- Provide financial support for retention (i.e., a potential retainment bonus)
- Develop a Rhode Island energy job board that could include both policy and trades
- Partner with grade schools in environmental justice communities to promote math and science at early ages
- Coordinate the joint development of training with organizations and individuals that are conducting workforce development training in their respective communities
- Reassess and make changes to streamline certification processes for BPI and other energy efficiency related certifications
- Standardize programs and offerings so that they are easy to braid together
- Offer additional incentives for staff (i.e., rental assistance, work/life balance, bonuses, paid apprenticeships)
- Offer workshops for businesses in environmental justice communities to learn how to become an official National Grid vendor

### Program Budgets

On August 10<sup>th</sup>, the EWG met to discuss program budgets. The goal of this meeting was to prioritize recommendations that the EWG group believes would make the most significant impact on equity and should receive a budget allocation. Prior to the meeting, the facilitator compiled the top recommendations from the second, third, and fourth meetings into one list. EWG members then voted

on which of these top recommendations would ultimately make the most significant impact on equity and that National Grid should prioritize for budget allocation.

This meeting began with a breakout group discussion to identify ways that EWG members would evaluate a budget for equitable allocation. Several ideas were mentioned including evaluating the budget to ensure that the greatest investments are focused on closing the largest gaps (such as gaps in minority contractors, insufficient awareness of opportunities, pre-existing and disqualifying housing conditions). Budget should also reduce disparities in participation and service delivery, and target underserved subsets of the population including environmental justice communities, minority- and women-owned contracting firms and small businesses, apartment buildings, and non-English speaking households. Goal setting also emerged as an important part of equitable budget evaluation. Setting goals on how much money and resources should go to specific subsets of the population and specific geographies and then evaluating the budget based on these benchmarks. Participants mentioned that benchmarked goals should be set both periodically and continuously such that there are long-term (3-5 years), annual, and quarterly goals for distributing funding and resources equitably. In addition, there were several ideas that were specific to National Grid's budget. For example, some EWG members mentioned that if they were evaluating National Grid's budget, they would be looking for a diversified portfolio that is inclusive of benefits to all ratepayers including low-income and commercial and industrial payers. More specifically, they would be looking at what each class of customers are paying, where program dollars are going, and who's receiving the benefits of the programs to determine how equitable the budget is.

In the next part of the meeting, each participant voted on the top three recommendations that they felt would make the most significant impact on equity and that should be prioritized for a budget allocation by National Grid. Participants voted on a list of recommendations that were compiled from the second, third, and fourth EWG meetings on marketing and outreach, metrics and data collection, and workforce development and training, respectively. In total, there were fourteen recommendations from the previous EWG meetings that were classified as a top recommendation. The top five priority recommendations that received the highest number of votes during this meeting are listed below in order of highest number of votes to lowest.

#### Top five priority recommendations

1. Hire multilingual staff and partner with trusted leaders who have the same ethnic background and that frequent popular community gathering places such as community centers, faith-based organizations, etc. Potential partnerships can include 1) working with YMCA's, senior centers, schools and universities, or other community organizations to provide program information at an event they are hosting, 2) co-hosting events in partnership with community organizations, 3) sponsoring events or efforts that help to meet other community needs such as a food drive or trash pick-up, or 4) partnering with trade associations or career centers to host trainings and job fairs.
2. Benchmark Energy Efficiency Program participation data for race, geography, socioeconomic status, language, age of home, age of owner, age of renter, heating fuel type, type and age of heating /hot water/cooling systems.

3. Develop multilingual marketing and outreach materials. Use accessible language to target audiences in each publication.
4. Partner with other home visiting programs to expand the reach and impact of National Grid's energy efficiency programs. Home visitors as part of visiting programs are typically discussed in a healthcare context and can include nurse case managers, occupational and physical therapists, home-based healthcare nurses, travelling doctors or physicians, and case workers. Partnering with these individuals or entities can include 1) offering trainings so that home visitors can identify potential beneficiaries of energy efficiency programs and make referrals into National Grid's programs, 2) incentivizing home visitors to educate their clients on energy efficiency and refer their clients into energy efficiency programs, 3) co-hosting outreach and marketing events that cover health- and energy-related topics, or 4) targeting energy efficiency programs, energy bill assistance, and heating or cooling assistance at high-risk households that often have medical conditions that cause them to have health-based home visitors.
5. Reduce barriers to professional development as well as entry into the workforce. This can include 1) helping to pay for, or support employees in paying for, necessary trainings for interested individuals, 2) investing in building new, accessible training centers in underserved communities, particularly in cases where the closest training center is out of state, 3) incentivizing certified trainers to host more frequent trainings in different parts of the state, particularly in underserved areas, 4) helping to create on-the-job training programs to allow trainees to get necessary and valuable experience, 5) providing upfront seed capital to foster the creation of more minority- or women-owned businesses by covering costs for tools, trucks, and supplies as well as operating investments for costs such as liability insurance, 6) potentially paying off student loans of energy efficiency workers to reduce economic burden, or 7) sponsor other professional development and skills trainings to allow workers to build competencies in other areas that enable expansion of work into new fields.

#### Additional Top Recommendations (excluding the top five priority recommendations)

- Include in the messaging that National Grid is not code enforcement so residents can feel more comfortable.
- Develop age-appropriate marketing strategies to connect with various age groups that live in a household such as utilizing social media, apps, and text messaging to reach new audiences and help engage customers with their energy usage.
- Allocate a proportion of Energy Efficiency marketing budgets to municipalities for mailing energy efficiency materials; some municipalities use third parties for mailing.
- Provide incentives to community groups that are serving vulnerable populations.
- Develop a mechanism that allows participation or action to occur immediately after the marketing step.
- Track late payments and shut offs.
- Align energy efficiency programs with healthcare and partner to achieve healthcare goals, promote further engagement, and sharing health outcome and impact data.

- Perform a full review of all HR policies and remove outdated policies that restrict hiring such as background checks.
- Collaborate with local diverse community organizations to train and certify potential workers (Progreso Latino, Hispanic chamber of commerce, cape Verdean community development).

After voting, there was some discussion about why these top five priority recommendations rose to the top. The discussion also highlighted other recommendations that didn't rise to the top but that members of the group still view as important. It became clear during the discussion that participants believe that all fourteen possible recommendations are important and should be components of National Grid's equity strategy. Trust was another principle that guided some participants' votes. Several participants discussed the importance of having trusted messengers that look like the community, which can help the community see that the program is intended for them, and that can communicate effectively with potential clients in their first language. Recommendations 1 and 4 – hiring multilingual staff and partnering with trusted community leaders including faith-based leaders, representatives from community centers, and healthcare professionals – represent actions that National Grid can take to build and foster trust in their programs. According to EWG participants, other home visitors as a part of home visiting programs can be viewed as trusted leaders since they are often tasked with providing healthcare related services.

Since the first EWG meeting, access emerged as a key part of the definition of equity and some participants mentioned that it's hard to imagine equitable access to programming if program materials or staff are not sensitive to non-English speaking or other multi-cultural communities. Another key part of accessibility is the ability to speak to priorities that potential program participants care about. One meeting participant mentioned that from their experience households, particularly underserved and under-resourced households, often care more about keeping the lights on and other basic human needs than cost effectiveness of installation measures which is what National Grid – and many of their contractors by proxy – are required to care about. This can create a barrier in participation if National Grid staff and contractors are focused on measures that provide significant energy savings but may not align with the needs of that household. Recommendations 1 and 3 represent actions that National Grid can take to increase access to its programs among underserved and under-resourced communities.

Intentionality also emerged as a principle that guided meeting participants' votes. Given that certain demographics have lower participation rates in National Grid's programs, are disproportionately impacted by energy issues, and are less likely to get a job working in the energy efficiency industry – one participant noted that much of this is by intentional design given how energy and other social and economic policies are developed and implemented – it's important that intentional action is taken to overcome these barriers and change these realities. All five of the top recommendations represent actions that National Grid can take to be intentional about advancing equity in specific and targeted ways that are also responsive to the needs of underserved, under-represented, under-resourced, and historically excluded households and communities.

## Conclusion and Future Directions

On August 24, 2021, the EWG met to discuss National Grid's proposed actions for 2022 programming and the future of the EWG. The goal of the meeting was to hear National Grid's proposed actions for 2022 programming that were driven by the EWG's top fourteen recommendations, discuss these proposed actions, and solicit feedback on the EWG and any ideas for potential future directions of the group.

One of the goals of the EWG was to provide National Grid with a set of prioritized recommendations that can be used to propose enhancements to National Grid energy efficiency programs in the 2022 Annual Plan. The topic-specific meetings (meetings 2-5) resulted in a set of fourteen top recommendations, including a set of five prioritized recommendations that emerged to the top through a vote in the Program Budgets meeting. Using the EWG's top fourteen recommendations, National Grid proposed a set of actions that would enable the company to make progress towards improving the advancement of equity with its energy efficiency programs and presented these recommendations during the last meeting. The EWG's top fourteen recommendations, including the five prioritized recommendations, and National Grid's proposed actions can be found in National Grid's 2022 Annual Plan.

After National Grid's presentation, EWG members engaged in a discussion to provide feedback on their proposed actions. Generally, EWG members were supportive of National Grid's proposed actions with several members specifically referring to these proposed actions as "solid steps forward", "a great start" and "a great beginning". This language reinforces the perspective that equity is a journey and, while these proposed actions can make a significant impact, there is still ways to go to achieving truly equitable programming and resulting outcomes. Several members also mentioned the importance of implementation. While the inclusion of these proposed actions in the 2022 Annual Plan is significant, the way these actions are implemented can further advance equity or can be a hinderance. Many EWG members expressed a desire to monitor the progress of these proposed actions, assuming they are approved by the PUC, and continue to meet with National Grid in an advisory capacity to ensure and support effective implementation.

There were some proposed actions, where EWG members had additional, specific feedback. For example, in response to National Grid's proposed actions for top Recommendation #1 to translate direct mail more consistently into Spanish and initiate an effort beginning with Hispanic customers to utilize new linguistic and cultural elements for web pages, customer toolkits, call-center support, and third-party partners, one participant noted that additional language capacity is needed beyond English and Spanish given the diversity of residents in Rhode Island. In addition, in response to National Grid's proposed actions for Recommendation #9 to establish a regular report that shows participation for their EnergyWise, multifamily, and income-eligible, single-family programs at the zip code level, one participant mentioned that it might be helpful to track customer data at levels more granular than zip code, such as the census tract level. Lastly, in response to National Grid's proposed recommendations for Recommendation #12 to continue its current background check policies, one participant noted that one potential area for improvement of the current policy would be to exhibit transparency around the background check process so that candidates know that they weren't selected for a position because of issues with their background check. This recommendation emerged as a best practice from a review conducted during the process to revamp the background check policies for all Rhode Island's state



licensure. As part of the passage of the [Fair Chance Licensing legislation](#) there were two major components of expanding equitable opportunity to professions that require background checks. One is to narrow the scope of which issues are disqualifying to only those issues that are directly relevant to the safety and well-being of program participants. The second is to ensure transparency so that applicants know and understand what the basis of their disqualification has been and are provided an opportunity to correct or rebut information relied on in making the decision. In this context transparency includes both notice of the basis for disqualification *and* an opportunity to correct or challenge that basis as incorrect or not relevant.

The second part of the meeting included a debrief of the six EWG meetings and a discussion of the potential future of the EWG. A survey was sent to EWG members prior to the meeting to solicit feedback. There were two questions about the value of the EWG and four questions on the desired future of the EWG. The results of the survey are detailed in the Appendix.

Every survey respondent thought the EWG meetings were valuable. In particular, the top two qualities that EWG members found the most valuable were the opportunity to 1) work collaboratively to develop specific recommendations for National Grid and 2) meet other stakeholders interested in Rhode Island equity issues. All survey respondents thought that EWG meetings should continue beyond this initial phase, meet at least twice a year with most respondents preferring to meet quarterly, and include other members such as National Grid clients, Habitat for Humanity, more grassroots advocacy groups, religious institutions, and industry representatives. In addition, survey respondents offered ideas for what the objective of the EWG should be. These ideas include serving as an advisor to National Grid to offer new and refined recommendations, monitor the progress and implementation of recommendations, evaluate the equity impact of the recommendations and programs, and offer additional marketing and outreach strategies that can help promote National Grid's programs. Based on this feedback, it seems that this EWG was a worthwhile initiative that National Grid can use to continue to refine its programs and work towards a more equitable set of energy efficiency programs.

In the 2022 Annual Plan, National Grid proposed a set of actions, driven by the EWG's recommendations. These proposed actions include a commitment to continue convening the EWG on a quarterly basis with the goal of updating the group on its implementation progress and continuing to leverage the group's experiences and expertise. For more detailed information on National Grid's proposed actions, refer to National Grid's 2022 Annual Plan.

## Acknowledgements

The Green & Healthy Homes Initiative (GHHI) would like to thank:

- All the Rhode Island advocates that have continuously pushed National Grid to develop, implement, and deliver their energy efficiency programs more equitably and that resulted in National Grid's proposal and commitment to hosting this Equity Working Group.
- National Grid, specifically Amy Vavak and Laura Rodormer, and Rhode Island Office of Energy Resources (OER), specifically Becca Trietch and Nathan Cleveland, for co-hosting the Equity Working Group.
- Each of the EWG members for their participation and engagement through the process
- Each non-EWG member that devoted time to providing their perspective
- Brian Kearney and Vin Graziano from RISE Engineering and Paul Salera from Westbay Community Action for donating their time to speak to the EWG on the panel during the Workforce Development meeting.

## Appendix

### 1. ABOUT GREEN & HEALTHY HOMES INITIATIVE

The Green & Healthy Homes Initiative (GHHI) is a national organization with the mission dedicated to addressing the social determinants of health and the advancement of racial and health equity through the creation of healthy, safe and energy efficient homes. By delivering a standard of excellence in its work, GHHI aims to eradicate the negative health impacts of unhealthy housing and unjust policies for children, seniors and families to ensure better health, economic and social outcomes for low-income communities of color. The vision of our work is to advance health and racial equity through healthy housing, with a focus in limited-income communities of color.

GHHI is the largest healthy homes organization in the country, operating in over sixty-five communities and states, focused on improving housing quality and establishing public-private partnerships that allow local governments to efficiently and effectively utilize resources related to housing. GHHI has worked to design and implement policies and programs at the federal, state, and local level that promote healthy, energy efficient, and climate friendly housing. In Rhode Island, GHHI aligns and braids housing, health, and energy efficiency resources to offer a holistic set of services to meet the housing needs of families and children, offers healthy homes training for Spanish-speaking contractors in partnership with RI Builders Association, manages Attorney General Funds to support comprehensive interventions in different jurisdictions, partners with Integra Community Care (Accountable Care Entity) to deliver asthma and healthy homes services to 10 homes of Integra members with asthma, and provides healthy housing training to residents and contractors in Central Falls, RI.

### 2. EWG Guidelines and Expectations

Below are the guidelines and expectations that guided each EWG meeting. Meeting attendees shall:

- Make every attempt to attend every meeting on time
- Share the oxygen – ensure that all participants who wish to have an opportunity to speak are afforded a chance to do so
- Listen to other points of view and try to understand differing viewpoints and other interests
- Maintain a focus on collaboration and solutions
- Share information openly and respectfully
- Make sure information given is accurate
- Remain flexible and open-minded
- Review meeting notes and documents prior to next meeting
- Respect the privacy of the meeting
- Meeting notes are for participants only
- What is said during meetings is important, who said it is not
- Make sure information given is accurate.
- Remain flexible and open-minded.

### 3. Additional Perspectives and Recommendations from Non-EWG members

Separate from the EWG process, GHHI was able to connect with several organizations to incorporate their perspectives and recommendations. GHHI met with the Rhode Island Office of Healthy Aging, Integra Community Care Network, Green Energy Consumers Alliance, and a representative from the

Housing Resources Commission. Each organization was then sent a list of questions (below) that represent similar questions that were posed to the EWG. Given each respondent had different experience and expertise on equity and National Grid's programs, respondents were given the option to respond only to questions that they felt comfortable answering. As a result, each organization did not respond to all questions. To maintain anonymity, all responses from each respondent were organized by question, compiled into one list, and included below. Since these organizations were not a part of the EWG and did not attend any meetings, they are unaware of the nature of EWG conversations. Therefore, some of the perspectives and recommendations may coincidentally be like ones posed by the EWG.

- Introductory meeting
  - o What does equity mean to you?
    - Equity to us mean to promote the values of diversity and inclusion by honoring lived experience and creating opportunities for all Rhode Islanders to live and age with dignity and purpose.
  
- Marketing and Outreach
  - o What does equitable marketing and outreach mean to you?
    - Equitable marketing and outreach mean to identify the most vulnerable communities – knowing who to reach, especially marginalized populations, by leading with a racial and social lens. At OHA, we partner with organizations across the state to equip our constituents with all the resources they need.
    - The ability to convey a message in a way that allows people from different backgrounds to understand that message
    - Multilingual marketing opportunities
    - Simple marketing language that is sensitive to customers with varying educational backgrounds
    - Everyone should know that these opportunities are available
  
  - o What are strategies that can help us achieve equitable marketing and outreach?
    - Phone banking
    - Mail postage paid flyers and mailers
    - Print signage in multiple languages
    - Social media
    - Representation is great...but not enough
    - Making sure language is simple and easy to understand (not just the standard 5<sup>th</sup> grade reading level recommendation) but making sure it takes cultural differences into consideration. (i.e. idioms may be difficult for certain groups to understand)
    - Make use of visuals, so nonnative English speakers can understand message without having to read text
    - Research demographics in the community to whom you're trying to market, and make sure translated materials are easily available in top languages spoken in that community

- Get creative about where you're marketing, to make sure information is accessible to different groups (i.e. community spaces, barber shops, churches, etc.)
  - Ask the community (i.e. conduct focus groups to learn what equitable marketing means to the community & what strategies they recommend)
  - Avoid using jargon
  - Be mindful that some languages have different dialects (ex. Spanish has over 20 different dialects from different countries so using simplified Spanish could help to make marketing broadly accessible)
  - Incorporate marketing strategies or different abilities (i.e. building the capacity for website information to be accessed auditorily for people with vision impairment)
  - Conduct marketing through social media and social service agencies
  - Ensure that the "right" messengers are utilized to reach specific target audiences
- Metrics and Data Collection
- What should the goals of the energy efficiency programs be?
    - Lowering of energy bills
  - Which benefits of energy efficiency should be captured?
    - Lower bills
    - Less energy usage
  - How do we ensure that the most vulnerable customers are benefitting?
    - Before launching a marketing campaign, conduct focus group & survey group to see whether they think the campaign is equitable
    - Not sure if this is possible, but for digital marketing, including social media, track the number of clicks, likes, views, shares, & who/where they're coming from
    - Engagement rates: after creating a marketing campaign to engage new groups, track how many people actually engage with whatever that initiative is
    - Following up on program impact after services are delivered
    - Providing services proactively to customers that National Grid knows are struggling to pay their bills (i.e. offering discounted rate once National Grid recognizes that the customer is struggling and connecting those customers with energy efficiency programs)
    - Ensure that following any information provided on customer energy use that there are specific action steps that National Grid provides customers to help them use less energy and pay lower bills.
    - Track the number of renters being served
    - Track demographic information of customers and program recipients
    - Move from a savings as the primary metric governing these programs to a broader benefits metric
    - Create equity-based performance incentive mechanisms (i.e. incentives for reaching the renter participation goal or an income-eligible participation goal)
- Workforce Development and Training

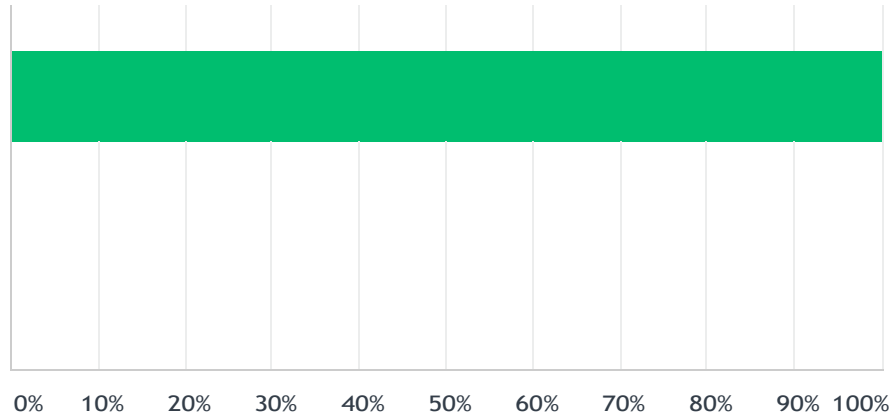
- How can we ensure that the energy efficiency workforce is as diverse as possible?
  - We can ensure it to be diverse by including people with variety across several different categories, such as religion, culture sexual orientation, language, educational backgrounds, skills, and abilities.
  - Reevaluate current job descriptions and remove any qualifications that aren't completely necessary for the role
  - Get creative about where you're posting job opportunities—if you'd like to prioritize hiring in a certain community, then ensure your job postings are reaching that community
    - Collaborate with community leaders & health equity zones and regularly share job opportunities with these groups, so they can share directly with community residents
  - Put together a focus group of community residents and ask them this question
- What barriers exist for entry and retention of potential energy efficiency workers?
  - Barriers to entry: Qualifications; job postings not reaching specific communities
  - Barriers to retention: not creating a comfortable environment that takes into account cultural differences; an environment where employees may feel singled out/ don't have peers that look like them or share similar experiences/ backgrounds
  - There is sometimes a bias towards hiring individuals that can complete trainings quickly, while some individuals require more time based on their differing abilities.
- What recommendations do you have that can overcome these barriers?
  - Ensure that there are jobs and positions available for people of different abilities
  - Provide specialized trainings for entry level positions that are accessible to folks at every level of abilities
- Program Budgets
  - What does an equitable energy efficiency budget look like?
    - (No responses)
  - How would you review a budget for an equitable allocation?
    - (No responses)
  - Which recommendations would have the most significant impact on equity?
    - Devote more of the budget to income-eligible and moderate-income residential customers
    - Expand offerings to moderate income customers
- Future of the EWG
  - If the EWG, would continue:
    - How would you want that engagement to look?
      - To connect people in the community with skills and abilities to jobs that can help them thrive.

- I'm not sure what the current group looked like since I wasn't able to attend the meetings, but from personal experience with organizing working groups, I know that it's often easier to engage CBO representatives than residents. If your working group was mainly comprised of CBO representatives, I'd recommend figuring out ways to get community residents involved with the group... and creating an environment where residents feel comfortable providing feedback (i.e. ensuring there's an interpreter, ensuring materials are presented in a clear & simple way, etc.)
- What would you want the objective to be?
  - Discuss strategic ways to meet employer demand and ensure particular groups are prioritized.
  - Align on priority actions that could potentially be included in future legislation that would alter the program services and delivery
- How often should the group meet?
  - Bi-monthly meetings.
  - Monthly, ideally not during the summer months.

#### 4. Survey: Evaluation of EWG and Future Directions

### Q1 Did you find value out of this EWG?

Answered: 13 Skipped: 0

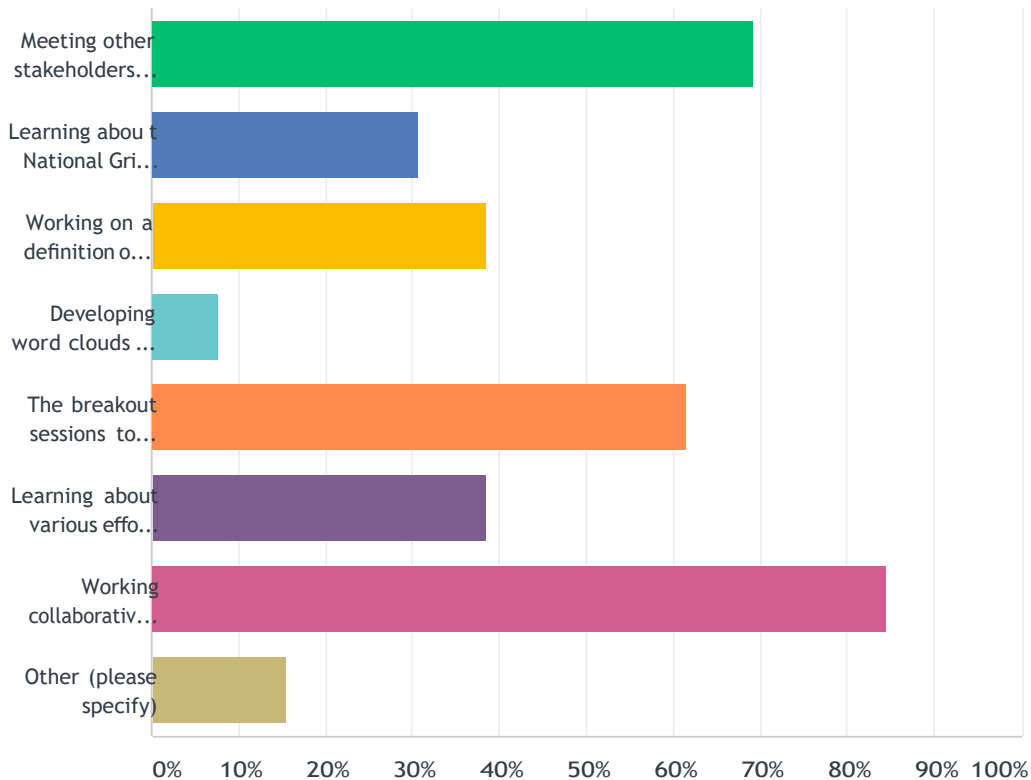


| ANSWER CHOICES | RESPONSES |    |
|----------------|-----------|----|
| Yes            | 100.00%   | 13 |
| No             | 0.00%     | 0  |
| TOTAL          |           | 13 |



## Q2 What did you find valuable in the EWG?

Answered: 13 Skipped: 0



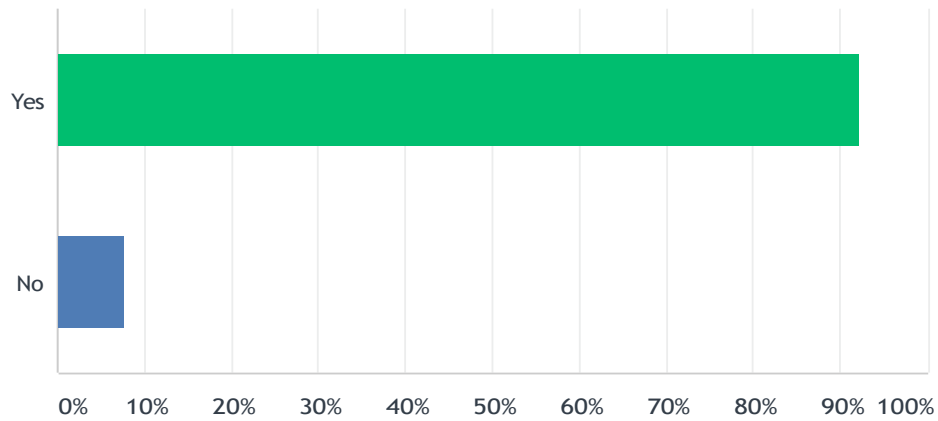
| ANSWER CHOICES   | RESPONSES |    |
|--|-----------|----|
| Meeting other stakeholders interested in RI equity issues  | 69.23%    | 9  |
| Learning about National Grid's programs and efforts to call out and/or add components of equity within their EE Programs | 30.77%    | 4  |
| Working on a definition of equity  | 38.46%    | 5  |
| Developing word clouds to understand the priorities of EWG participants  | 7.69%     | 1  |
| The breakout sessions to discuss and document relevant information and ideas.  | 61.54%    | 8  |
| Learning about various efforts in RI that are addressing, or pursuing, steps to achieve equity                           | 38.46%    | 5  |
| Working collaboratively to develop specific recommendations for National Grid  | 84.62%    | 11 |
| Other (please specify)   | 15.38%    | 2  |

Total Respondents: 13

| # | OTHER (PLEASE SPECIFY)   | DATE               |
|---|--|--------------------|
| 1 | Sharing ideas with other stakeholders and NG to advance and center equity in NG programs                             | 8/24/2021 10:40 AM |
| 2 | To start a new process that will evolve over time with key organizations at the table to make a difference over time | 8/24/2021 10:33 AM |

### Q3 Should this EWG continue?

Answered: 13 Skipped: 0



| ANSWER CHOICES | RESPONSES |    |
|----------------|-----------|----|
| Yes            | 92.31%    | 12 |
| No             | 7.69%     | 1  |
| TOTAL          |           | 13 |

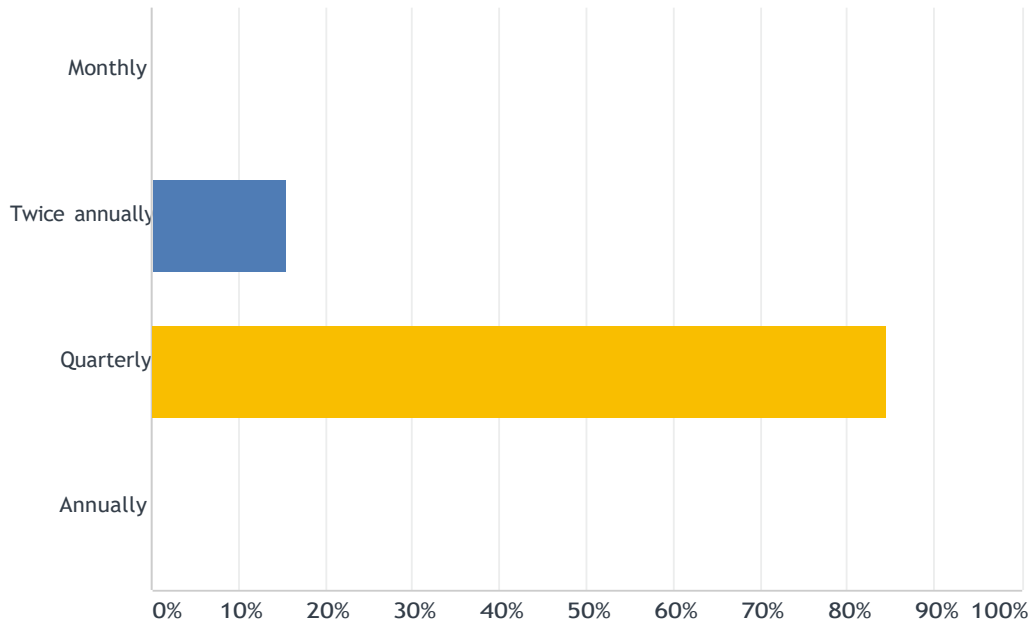
## Q4 If the EWG continues, what should the objective of the group be?

Answered: 13      Skipped: 0

| #  | RESPONSES  | DATE               |
|----|--|--------------------|
| 1  | Advise National Grid on marketing, outreach strategies to foster equity and inclusion  | 8/24/2021 1:58 PM  |
| 2  | Advisory capacity to track National Grid implementations and outcomes progress and make recommendations as needed  | 8/24/2021 1:42 PM  |
| 3  | to generate a network of channels to help promote the RI EE Program through all the participating stakeholders.  | 8/24/2021 10:48 AM |
| 4  | Helping to evaluate programs and continue recommendations  | 8/24/2021 10:42 AM |
| 5  | Monitor implementation of recommendations, continue to develop and refine additional recommendations, support a continued equity focus in ALL NG programs and priorities   | 8/24/2021 10:40 AM |
| 6  | for check ins /coordination  | 8/24/2021 10:36 AM |
| 7  | Since Equity work is not a singular event, the EWG should continue to home in and evolve the work and provide advisory role in the implementation.   | 8/24/2021 10:36 AM |
| 8  | Monitor implementation of recommendations.   | 8/24/2021 10:33 AM |
| 9  | oversite of initial recommendations and bring stakeholders who did not participate   | 8/24/2021 10:33 AM |
| 10 | Assessing progress towards equity and revising strategies.   | 8/24/2021 10:27 AM |
| 11 | To be a voice and feedback to National Grid on equity issues, monitor progress of plan, suggest revisions/ fine tuning of the plan as needed; to urge National Grid to incorporate equity more broadly within its services and programs (not just energy efficiency) | 8/24/2021 8:51 AM  |
| 12 | Not sure   | 8/23/2021 11:46 PM |
| 13 | Explore how participating organization and other can support and/or collaborate with National Grid to advance equity initiatives. Conduct accountability check-ins with National Grid on the progress of their energy equity efforts.                                | 8/23/2021 8:07 PM  |

## Q5 If the EWG continues, how often should the group meet?

Answered: 13 Skipped: 0



| ANSWER CHOICES | RESPONSES |
|----------------|-----------|
| Monthly        | 0.00% 0   |
| Twice annually | 15.38% 2  |
| Quarterly      | 84.62% 11 |
| Annually       | 0.00% 0   |
| <b>TOTAL</b>   | <b>13</b> |

## Q6 Who else should participate in an ongoing EWG?

Answered: 10      Skipped: 3

| #  | RESPONSES   | DATE               |
|----|---|--------------------|
| 1  | Customer/constituent  | 8/24/2021 1:58 PM  |
| 2  | Habitat for Humanity  | 8/24/2021 10:48 AM |
| 3  | We should reach out to and include more grassroots advocacy groups who work on equity issues in the community   | 8/24/2021 10:40 AM |
| 4  | not sure  | 8/24/2021 10:36 AM |
| 5  | n/a   | 8/24/2021 10:36 AM |
| 6  | Religious institutions, clients   | 8/24/2021 10:33 AM |
| 7  | Any stakeholders that would provide value. Perhaps more industry.   | 8/24/2021 10:27 AM |
| 8  | It would be nice to hear from a senior (as to post, not age) executive from RI National Grid at least once a year, to insure CEO/high level commitment to equity and inclusion. Correspondingly, it would be similarly useful to have head of DOER and the RIPUC hear about and commit to equity. | 8/24/2021 8:51 AM  |
| 9  | Consumers   | 8/23/2021 11:46 PM |
| 10 | National Grid clients and other community members directly impacted by National Grid services. Grassroots environmental equity organizations and grassroots economic justice organizations.   | 8/23/2021 8:07 PM  |