Framework for Implementation:
Efficient Housing for All
Community of Practice (EHACoP)

University of Rhode Island Cooperative Extension
Rhode Island Energy Efficiency Council

2025

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1. Defining the EHACoP

1.1 Mission & Purpose

The Efficient Housing for All Community of Practice (EHACoP) will be a structured, multi-stakeholder initiative that fosters cross-sector collaboration among specialists in public health, community engagement, and energy efficiency. The Community of Practice (CoP) will serve as a knowledge-sharing and action-oriented network that identifies challenges, co-develops solutions, and enhances program implementation through cross-sector partnerships. Its primary objective is to mitigate barriers to participation in income-eligible home energy efficiency programs in Rhode Island through evidence-based, community-driven interventions.

This model aligns with the CoP model as described in Wenger-Trayner et al. (2015), which defines a CoP as a group of people who share a concern and learn how to address it through regular interaction [3]. The EHACoP will build on best practices in strategic convening and collaborative learning from other CoPs in public health and energy equity [1,2].

1.2 Goals

1. **Increase Participation:** Develop and deploy community engagement strategies to reduce barriers preventing income-eligible households from accessing energy efficiency programs.
2. **Enhance Cross-Sector Collaboration:** Establish an active network between energy efficiency experts, public health advocates, community organizations, and residents to co-develop solutions.
3. **Improve Program Design:** Provide recommendations to policymakers and program administrators for more accessible, effective, and equitable energy efficiency initiatives.
4. **Develop Knowledge-Sharing Mechanisms:** Create a centralized repository of resources, best practices, and case studies for stakeholders and community members [6].
5. **Measure and Communicate Impact:** Utilize evaluation models to track progress, identify key challenges, and refine approaches [4].

2. Structuring the EHACoP

2.1 Membership & Stakeholders

EHACoP will include the following members and roles:

- **Core Institutional Partners:** Organizations and agencies directly involved in the facilitation of the CoP and/or the implementation of energy efficiency programming in Rhode Island.
    - URI Cooperative Extension Energy Literacy Initiative
    - RI Department of Health (RIDOH) Health Equity Zone (HEZ)
    - RI Office of Energy Resources (RIOER)
    - RI Department of Human Services (RIDHS)
    - RI Community Action Agencies (CAA)
    - RI Energy
    - ClearResult
    - The RISE Group
    - Local municipal authorities and housing organizations
- **Community Representatives:** Residents with lived experience, community health workers, and advocates, recruited through HEZ partnerships.
    - Income-eligible residents with lived experience of energy insecurity;
    - Community-based health professionals and grassroots advocates; and
    - Tenant advocacy groups and property management entities.
- **Advisory Partners:** Policymakers, energy efficiency program administrators, and funders who can influence programmatic and policy changes and provide strategic direction and review of EHACoP findings.
    - RI Energy Efficiency Council (EEC) members
    - RI Office of Energy Resources (RIOER) staff
    - State legislative committees overseeing energy and housing policy
- **Academic & Research Support:** Universities and research institutions contributing data analysis, behavioral research, and best practices [5].
    - University of Rhode Island
    - Brown University
    - Nonprofits engaged in energy equity and public health research

2.2 Roles & Responsibilities

- **Facilitators (URI & EEC Team):**
    - Kate Hardesty, Kevin Drumm
        - Oversee CoP activities, Facilitate meetings, Ensure strategic alignment, Reporting
    - Nina Lima
        - Coordination of notetakers, materials management, participant registration
- **Knowledge Managers (URI & EEC Team):**
    - Document discussions
    - Curate resources
    - Disseminate findings via a public knowledge-sharing platform [5].
- **Working Groups (Thematic Teams):**
    - Address specific barriers such as outreach, deferral issues, program accessibility, and health-energy linkages [3].
- **Community Ambassadors:**
    - Residents and frontline workers who provide real-world perspectives and ensure culturally relevant engagement strategies.

3. Operational Framework

3.1 Convening & Engagement Model

EHACoP will adopt a multi-tiered engagement structure informed by the Rockefeller Foundation's strategic convening framework [2]. EHACoP will use a combination of regular gatherings to promote knowledge exchange and action:

- **Monthly Meetings**: Led by URI Cooperative Extension Team, half of the meetings will be virtual on Zoom and half will be in-person, hosted at community libraries or nonprofits. The meetings will involve the presentation of relevant information and facilitated discussions focused on emerging barriers and solutions.
- **Working Group Breakouts**: Beginning in Session 4, dive into specific challenges/barriers (e.g. incentivizing landlords to weatherize their homes or addressing lead and mold remediation barriers to weatherization) identified during Sessions 1-3 in groups.
- **Community Learning Events**: Follow-up to the CoP conversation sessions, these events are an opportunity for public engagement and knowledge dissemination.These could include the RIDOH Health Equity Zone Learning Community Events and the Plugged into Energy Research lecture series, for example.

Action Steps for Effective Convening:

1. **Pre-meeting preparation:** Agenda-setting based on member surveys, logistical coordination, and pre-distributed materials.
2. **Facilitated discussion format:** Use interactive workshops, small-group breakouts, and problem-solving exercises [2].
3. **Real-time documentation & feedback:** Live note-taking and post-meeting synthesis for accountability; incorporate a "safebox" list of agreed upon discussion items / findings at the end of each session.
4. **Follow-up and accountability:** Clear action items assigned and tracked over time.

3.2 Community Learning & Capacity Building

EHACoP will employ structured learning models from previous successful CoPs [6]:

- **Workshops & Webinars:** Training on energy efficiency, indoor air quality, and overcoming programmatic barriers.
- **Knowledge Repository:** A digital platform housing case studies, outreach materials, and policy briefs [5].
- **Storytelling & Lived Experience Integration:** Collecting and publishing resident narratives to inform future policy changes with support from Community Action Agencies, Health Equity Zones, the RI Energy Efficiency Council, ClearResult and The RISE Group [3].

3.3 Communication & Outreach

- **Targeted outreach campaigns** using community radio, flyers, social media, and HEZ/CAA networks.
- **Multilingual materials** in Spanish, Portuguese, and other languages relevant to Rhode Island communities.
- **Regular updates (email communications, newsletters, reports)** summarizing meeting takeaways, progress, and success stories [5].

3.4 Adaptive Learning & Continuous Improvement

- **Regular reflection sessions** to refine strategies.
- **Data-driven adjustments** based on survey findings and participation trends.
- **Regular meetings with the advisory committee** between CoP sessions.
  - Sessions will be held:
    - During EEC Education Committee meetings
    - Week of May 26
    - Week of July 7

4. Strategy Development & Action Planning

4.1 SOAR Framework Application

Using the SOAR (Strengths, Opportunities, Aspirations, Results) framework, EHACoP will identify strategic priorities [1]:

- **Strengths:** Leveraging existing HEZ and CAA networks for income eligible community engagement.
- **Opportunities:** Expand participation and reduce deferrals through integrated service models and direct targeting of solutions to pre-weatherization barriers.
- **Aspirations:** Ensure all income-eligible residents benefit from energy efficiency programs.
- **Results:** Tracking of increased enrollment rates and reduced deferral cases with data from RI Energy, the RISE Group, ClearResult and CAA weatherization, etc.

4.3 Session Schedule and Objectives

TABLE 1		
#	Date	Objective
1	April 24 (in person)	Ensure that participants have a baseline understand of energy efficiency Begin to build a list of barriers to accessing energy efficiency programs in RI
2	May 8 (remote)	Create an exhaustive list of barriers to accessing energy efficiency programs in RI
3	May 21 (in person at HEZ LC)	Prioritize barriers to address through the Community of Practice
4	June 5 (in person)	Define all possible solutions to the prioritized barriers
5	June 16 (remote)	Prioritize solutions for each barrier to be further developed through the Community of Practice
	Week of July 7 (remote)	Professional Review of prioritized solutions
6	July 17 (remote)	Identify challenges that will be faced in implementing the proposed solutions and determine how and by whom they can be overcome
	End of July or Aug (TBD)	Report out at HEZ Learning Community

5. Evaluation & Sustainability

5.1 Monitoring & Evaluation

Building on **evaluation models for CoPs** [4], EHACoP will track:

1. **Short-Term Actions (0-6 months)**: Convene community members to identify and prioritize barriers and develop proposed solutions to the prioritized barriers.
   a. **Participation Metrics:** Attendance at convenings, diversity of membership.
   b. **Engagement Outcomes:** Changes in knowledge, collaboration, and participation, measured through: a) Pre- and post-event surveys; b) Stakeholder interviews and qualitative impact assessment; c) Tracking new partnerships and initiatives launched; and d) Case studies documenting participation barriers & solutions [4].
   c. **Programmatic Impact:** Increase in a) EHACoP participants' weatherization completion (e.g. Leading by Example); and b) general income eligible weatherization completion rate [6].
   d. **Community Outreach:** Number of community members engaged by CoP participants as part of CoP homework assignments
2. **Mid-Term Goals (6-12 months)**: Advocate for policy improvements based on CoP recommendations.
   a. **Policy Influence:** Number of recommendations adopted by state and utility partners [3].
3. **Long-Term Vision (3+ years)**: Institutionalize CoP recommendations into statewide energy efficiency policies. *NOTE: This is external / beyond the scope of this particular effort.*

5.2 Outputs

5.2.1 Policy Recommendations

- **Provide policy recommendations** to the Energy Efficiency Council to inform and be shared with relevant stakeholders and changemakers**.**
- **Strategies for ensuring that recommendations are achieved**
  ○ **Institutional Support:** Ensure short- and long term commitment from the RI Office of Energy Resources and the RI Energy Efficiency Council, RI Energy and other funders to follow through with solutions proposed through the EHACoP process [2].
  ○ **Institutional Capacity Building:** Embed CoP recommendations into permanent policy structures. [3].

5.2.2 RI Energy Efficiency Roadmap

- Compilation of a **comprehensive list of available state- and municipal-level resources** for energy efficiency upgrades and the reconciliation of pre-weatherization barriers.
- Creation of an **energy efficiency roadmap** to assist RI residents in navigating energy efficiency and pre-weatherization programs.
- To ensure sustainability of this output, the roadmap will need to be **continuously updated with input from relevant stakeholders**. On the website where the roadmap is hosted, a form will enable stakeholders to submit updates periodically.

5.2.3 Process Replication Guide

- **Scalability assessments** to share our process to be replicated for other topics or in other states.

6. Conclusion

The EHACoP is designed to reduce barriers to energy efficiency for income-eligible Rhode Islanders. Through strategic convening, knowledge-sharing, and advocacy, it will drive measurable improvements in participation rates and program accessibility. By leveraging best practices from established CoPs, the EHACoP will serve as a national model for energy equity and public health collaboration.

7. Sources

1. "Community of Practice Facilitation Guide." Center for Positive Organizations, Stephen M. Ross School of Business, University of Michigan. 2020.
2. "Convening Design 2022." The Rockefeller Foundation. 2022.
3. 1 Kelsey, Kathleen, and Eric Stafne. "A Model for Evaluating eXtension Communities of Practice." Journal of Extension, vol. 50, no. 5, Oct. 2012.
4. Lupton, Christine, Harry Webne-Behrman, Julie Hunt Johnson, Margaret Merrill, and Tetyana Schneider. "Communities of Practice Guide: Creating, reinvigorating or transforming a community of practice." Community of Practice Network.
5. Raison, Brian, Julie M. Fox, and Phil D'Adamo-Damery. "Crowdsourcing eXtension: Communities of Practice Provide Rapid Response." Journal of Extension, vol. 52, no. 6, Dec. 2014.
6. Sellers, Debra M., Andrew B. Crocker, Allison Nichols, Sarah D. Kirby, and Mary Brintnall-Peterson. "Creating the eXtension Family Caregiving Community of Practice." Journal of Extension, vol. 47, no. 5, Oct. 2009.

Appendices

Appendix 1: Session 1 Planning and Logistics

Date / Time:	Thursday, April 24, 6:00 - 7:30 p.m.
Venue:	Olneyville Resilience Hub
Registration Open?	Monday, March 24 [Nina]
Email invite sent?	Monday, March 31 [Kevin]
Catering Order Deadline?	Thursday, April 17
Notetakers Requested / Confirmed?	TBD [Nina]
Final Registration Count?	TBD [Nina]
Incentives Ordered/Set-up?	TBD [Kate]
Materials Needed?	Poster boards, markers, sticky nametags, catering [Nina]

Table 2: EHACoP Session 1 - Plan / Agenda			
Session Goals	1. Share information with participants about current energy efficiency programs in RI 2. Begin to brainstorm barriers to accessing energy efficiency programs in RI		
Session Outputs	Post-session quiz results assessing participant knowledge about energy efficiency programs in RI Initial list of barriers to accessing energy efficiency programs in RI		
Activity	**Lead**	**Time**	**Notes**
Registration	Nina L	5:30 p.m.	Registration opens! Sign in for incentive credit!
Welcome & Ice Breaker	Kate VH	6:00 p.m.	Ice breaker: CoP Bingo > Find a person who: ● B: Has had an energy efficiency audit completed on their home ● I: Is a home energy efficiency auditor ● N: Is a renter ● G: Is a homeowner ● O: Is a landlord
Pre-CoP Survey	Kevin D	6:15 p.m.	EHACoP Pre-Test Survey (Preview)
Goals & Norms	Kate VH Kevin D	6:20 p.m.	Ground Rules / Code of Conduct Expectations Community of Practice Goals and Session Goals
Literacy Learn	Kate VH Kevin D	6:30 p.m.	**Pre-Read materials:** TBD **Topic:** Conservation vs. efficiency 101, EE programs and incentives in RI
Facilitated Discussion	KVH, KD	6:50 p.m.	Facilitated discussion on barriers to accessing EE programs. Break into small groups to brainstorm all barriers to accessing energy efficiency programs in RI.

			Report out to the larger group. Add anything that we missed (*need list ahead of time → include the EWG list of barriers*)
Session Wrap-Up	KD	7:15 p.m.	Define Exhaustive List of Barriers and ask participants to commit to the exhaustive list of barriers.
Announcements & Plan for Next Session	KVH	7:25 p.m.	**Next Session:** Thursday, May 8 at 6:00 - 7:30 p.m. **Homework:** Find someone who has gone through the energy audit and energy efficiency upgrade process. Ask them about their experience, taking note of any points in the process where they ran into issues. What other issues could you imagine might come up for other residents going through the same process?

Appendix 2: Session 2 Planning and Logistics

Date / Time:	Thursday, May 8, 6:00 - 7:30 p.m.
Venue:	Zoom; https://uri-edu.zoom.us/j/97778108351
Registration Open?	Tuesday, April 8 [Nina]
Email Invite sent?	Tuesday, April 15 [Kevin]
Catering Order Deadline	n/a
Notetakers Requested / Confirmed?	TBD [Nina]
Final Registration Count?	TBD [Nina]
Incentives Ordered/Set-up?	TBD [Kate]
Materials Needed?	Poster boards, markers, sticky nametags

EHACoP Session 2: Plan / Agenda			
Session Goal	1. Education goal 2. Create an exhaustive list of barriers to accessing energy efficiency programs in RI		
Session Outputs	Exhaustive list of barriers to accessing energy efficiency programs in RI		
Activity	**Lead**	**Time**	**Notes**
Welcome & Ice Breaker	KVH	6:00 p.m.	Ice breaker description
Goals & Ground Rules	KVH, KD	6:10 p.m.	Review Ground Rules / Code of Conduct Review Community of Practice Goals and Session Goals Review Previous Session Outcome and recommit to the exhaustive list of barriers
Literacy Learn	TBD	6:20 p.m.	Utility rates 101 (from PUC presi)
Facilitated Discussion	KVH, KD	6:40 p.m.	Facilitated discussion on prioritization of barriers to accessing EE programs ● Activity to get people to rank the barriers ● Present results to the group ● Discuss any reasons why the list should be changed
Session Wrap-Up	KD	7:10 p.m.	Define list of barriers to focus on for remainder of CoP

Announcements & Plan for Next Session	KVH	7:25 p.m.	

Appendix 3: Session 3 Planning and Logistics

Date / Time: Wednesday, May 21, time TBD
Venue: Crowne Plaza Hotel, 801 Greenwich Ave, Warwick, RI
Registration Open? KD emailed Deb and Morgan re: registration logistics
Email Invite sent? TBD [Kevin]
Notetakers Requested / Confirmed? TBD [Nina]
Final Registration Count? TBD [Nina]
Incentives Ordered/Set-up? TBD [Kate]
Materials Needed? Poster boards, markers, sticky nametags

EHACoP Session 3: Plan / Agenda			
Session Goal	1. Education goal 2. Prioritize barriers to address through the Community of Practice		
Session Outputs	Identify barriers to prioritize for the remainder of the Community of Practice		
Activity	**Lead**	**Time**	**Notes**
Welcome & Ice Breaker	KVH		Ice breaker description
Goals & Ground Rules	KVH, KD		● Review Ground Rules / Code of Conduct ● Review Previous Session Outcome and recommit to the prioritized list of barriers ● Review Community of Practice Goals and Session Goals
			Literacy topic? *Energy conservation program goals, and why they are what they are (Carinel), Available technologies and why they're so important (Brendan)*
Facilitated Discussion	KVH, KD		Facilitated discussion on solutions to the prioritized barriers to accessing EE programs ● Brainstorm solutions in small groups - each group focuses on one barrier

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			• Participants rotate to different groups, adding additional ideas as they go
Session Wrap-Up	KD		Define exhaustive list of solutions to each of the barriers and ask participants to commit to the exhaustive list of solutions
Announcements & Plan for Next Session	KVH		

Appendix 4: Session 4 Planning and Logistics

Date / Time: Thursday, June 5, 6:00 - 7:30 p.m.
Venue: South Providence Library, 441 Prairie Ave, Providence, RI
Requested or Confirmed?   Requested by KD on 3/14/25
Registration Open?   Monday, May 5
Catering Order Deadline?   Thursday, May 29
Notetakers Requested / Confirmed?
Incentives Ordered/Set-up?
Final Registration Count?
Materials Needed?   Poster boards, markers, sticky nametags, catering

EHACoP Session 4: Plan / Agenda			
Session Goal	1. Education goal 2. Define all possible solutions to the prioritized barriers		
Session Outputs	List of all possible solutions to the prioritized barriers		
Activity	**Lead**	**Time**	**Notes**
Welcome & Ice Breaker	KVH		Ice breaker description
Goals & Ground Rules	KVH, KD		• Review Ground Rules / Code of Conduct • Review Previous Session Outcome and recommit to the exhaustive lists of solutions • Review Community of Practice Goals and Session Goals
Literacy Learn			**Literacy topic?** *The Realm of Possibility / Scope of RI weatherization resources available, Existing timelines for funding streams*
Facilitated Discussion	KVH, KD		Facilitated discussion on prioritization of solutions for each barrier • In small groups, identify the types of solutions (low-hanging fruit, institutional change, behavior

			change, etc.)
			• Then, identify the solution or combination of solutions that is best able to overcome the barrier • Present to the group • Provide opportunity for others to comment and provide feedback
Session Wrap-Up	KD		Identify common solutions and actors/stakeholders
Announcements & Plan for Next Session	KVH		

Appendix 5: Session 5 Planning and Logistics

Date / Time:	Wednesday, June 16, time TBD
Venue:	Zoom
Requested or Confirmed?	https://uri-edu.zoom.us/j/97778108351
Registration Open?	Friday, May 16
Catering Order Deadline?	n/a
Notetakers Requested / Confirmed?	
Incentives Ordered/Set-up?	
Final Registration Count?	
Materials Needed?	Poster boards, markers, sticky nametags, catering

EHACoP Session 5: Plan / Agenda			
Session Goal	1. Education goal 2. Prioritize solutions for each barrier to be further developed through the Community of Practice		
Session Outputs	List of prioritized solutions for each barrier to be further developed through the Community of Practice		
Activity	**Lead**	**Time**	**Notes**
Welcome & Ice Breaker	KVH		Ice breaker description
Goals & Ground Rules	KVH, KD		• Review Ground Rules / Code of Conduct • Review Previous Session Outcome and recommit to the solutions • Review Community of Practice Goals and Session Goals
Facilitated Discussion	KVH, KD		Facilitated discussion on development of solutions • In small groups, do a SWOT analysis for the solution(s) that the group defined in the last session

			● Create a draft plan for taking advantage of the strengths/opportunities and overcoming the weaknesses/threats ● Present results to the larger group ● Provide space for feedback and discussion
Session Wrap-Up	KD		Review commonalities and themes between the various SWOT analyses
Announcements & Plan for Next Session	KVH		

Appendix 6: Session 6 Planning and Logistics

Date / Time: Thursday, July 17, 6:00 - 7:30 p.m.
Venue: Zoom
Requested or Confirmed?   https://uri-edu.zoom.us/j/97778108351
Registration Open?   Thursday, June 17
Catering Order Deadline?   n/a
Notetakers Requested / Confirmed?
Incentives Ordered/Set-up?
Final Registration Count?
Materials Needed?   Poster boards, markers, sticky nametags, catering

EHACoP Session 6: Plan / Agenda			
Session Goal	1. Education goal 2. Identify challenges that will be faced in implementing the proposed solutions and determine how and by whom they can be overcome		
Session Outputs	List of challenges and how to overcome them for each solution working group		
Activity	**Lead**	**Time**	**Notes**
Welcome & Ice Breaker	KVH		Ice breaker description
Goals & Ground Rules	KVH, KD		● Review Ground Rules / Code of Conduct ● Review Previous Session Outcome ● Review Community of Practice Goals and Session Goals
Facilitated Discussion	KVH, KD		Facilitated discussion on creating final proposals ● In groups, produce the content for the proposals, including activities, responsible parties, necessary steps, expected challenged or bottlenecks, etc. ● Present results to the group ● Provide space for feedback
Session Wrap-Up	KD		Final survey
Announcements & Plan for Next Session	KVH		