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# Energy Efficiency Equity Update

EERMC Meeting 12/21/2023

# Agenda



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- Update on equity strategies and metrics
- Introduction to Green and Healthy Homes Initiative
- 2024 Equity Working Group
  - Review objectives
  - Review timeline and meeting plan
- Council discussion and feedback

# We've made meaningful progress on selecting equity strategies and metrics to adopt in 2024

## Completed

- ✓ Equity strategies and metrics received from Equity Working Group (EWG)
- ✓ Provided initial assessment of equity strategies in final 2023 EWG meeting
- ✓ Conducted feasibility assessment of proposed 2024 equity metrics, gathered feedback from Council
- ✓ Established 2024 EWG objectives and meeting plan with Green and Healthy Homes Initiative (GHHI)
- ✓ Communication to current EWG on progress, 2024 objectives, and Q1 meeting plan

Since Nov.

## In Progress (Q1 2024)

- + Recruitment for 2024 EWG
- + Rhode Island Energy (RIE) prioritization of equity strategies and metrics
- + EWG prioritization of equity strategies and metrics
- + Agree on short list of equity strategies and metrics to adopt starting in Q2 2024
- + Identify long-term equity strategies and metrics to work towards
- + Gather and incorporate EWG feedback on 2024 objectives

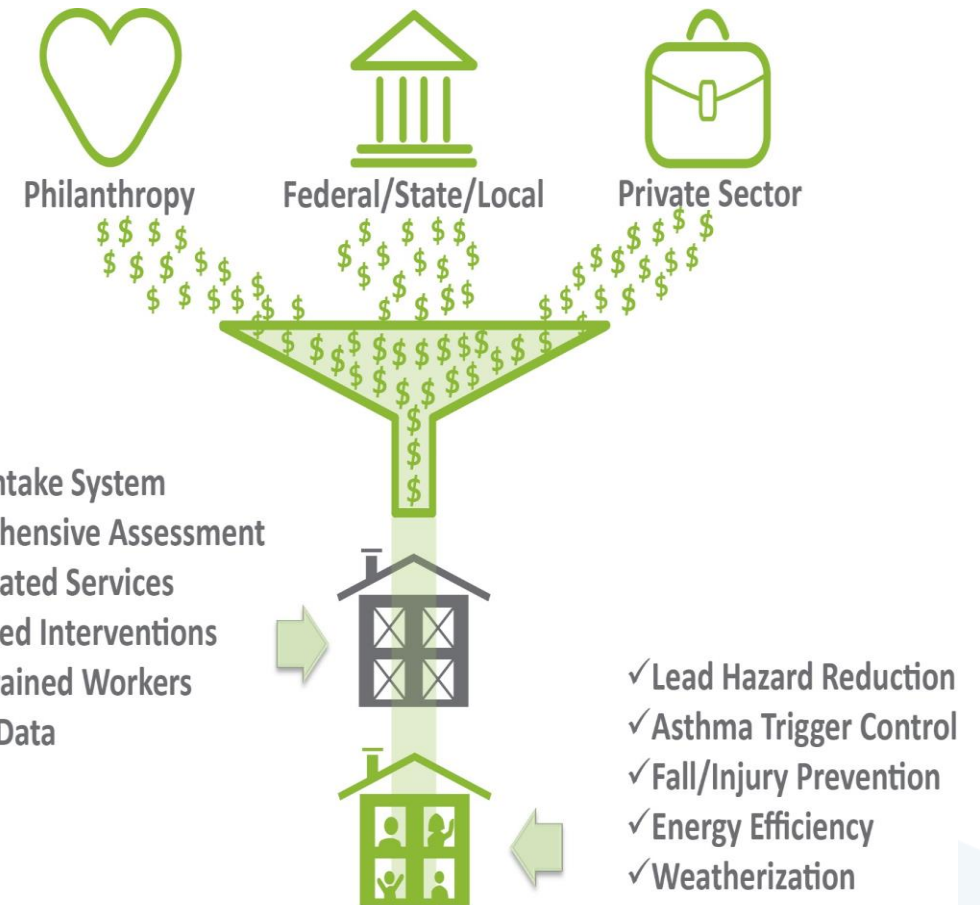
# Green & Healthy Homes Initiative



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## Who We Are:

- + Mission: To break the link between unhealthy homes and unhealthy families
  - + GHHI is dedicated to addressing the social determinants of health through the creation of **healthy, safe, and energy-efficient homes**
  - + GHHI aims to eradicate the negative health impacts of unhealthy housing to ensure better health, economic, and social outcomes in historically disinvested communities.



*GHHI Model: Addressing the Whole Home by Integrating Services*

# Green & Healthy Homes Initiative

## GHHI RI's Role:

- + To facilitate the EWG in partnership with the Company and the RI Office of Energy Resources and develop a list of prioritized recommendations and strategies that outline equity-related improvements for the Company to consider when planning, designing, and delivering its energy efficiency programs.
- + Worked with The Company to facilitate the RI EWG in May 2021 and has facilitated the group annually since its inception.
- + Why GHHI?

Long-Standing  
Service Provider

National Thought  
Leader

Whole-Home Strategy  
Model

# RI EWG Purpose

The EWG was envisioned to:

- 1) Be comprised of a diverse group 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 Company's energy efficiency programs; and
- 4) Be a resource in the development of future Annual and Three-Year Energy Efficiency Plans.

# We've identified a list of key objectives to achieve with the 2024 working group\*

- 1) Uplift more voices from Rhode Island's underserved & underrepresented communities
  - a) Conduct recruitment of residents, businesses, and organizations in these communities in Q1 2024
  - b) Provide an effective mechanism (e.g. through meeting facilitation practices, an additional forum to accommodate schedules) for these voices to be elevated and heard in the EWG
- 2) By end of Q1, agree on a shortlist of equity strategies and metrics for Rhode Island Energy to adopt and track for the remainder of 2024 (and beyond, if applicable)
- 3) Identify and prioritize long-term equity strategies and metrics that Rhode Island Energy can work towards adopting in future years
  - a) Based on the 2024 EWG findings, provide a *refreshed* (ie. updated, not new) list of equity recommendations for Rhode Island Energy to consider in its 2025 energy efficiency plan
- 4) Work with the Energy Efficiency Resource Management Council (EERMC) to establish a clearer line of communication with EWG (e.g., councilor(s) listening in at EWG meetings, identification of councilor representing low-income users, mid-year equity update)

# 2024 Equity Working Group activities timeline



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Month	Activities
January	<ul style="list-style-type: none"><li>• GHHI conducts additional recruitment for 2024 (Year 4) Equity Working Group</li><li>• <b>Year 4 Meeting #1</b> – EWG strategies / metrics (more details on slide 9)</li></ul>
February	<ul style="list-style-type: none"><li>• <b>Year 4 Meeting #2</b> – EWG strategies / metrics (more details on slide 9)</li></ul>
March	<ul style="list-style-type: none"><li>• <b>Year 4 Meeting #3</b> – EWG strategies / metrics (more details on slide 9)</li></ul>
May	<ul style="list-style-type: none"><li>• <b>Year 4 Meeting #4</b> – Discuss progress and challenges with implementing equity recommendations/workshop ideas and solicit feedback; intake new ideas and recommendations; feature guest presenters</li></ul>
July	<ul style="list-style-type: none"><li>• <b>Year 4 Meeting #5</b> – Discuss progress and challenges with implementing equity recommendations/workshop ideas and solicit feedback; intake new ideas and recommendations; feature guest presenters</li></ul>
August	<ul style="list-style-type: none"><li>• <b>Year 4 Meeting #6</b> – Review the first 2024 equity metrics report; review and compile EWG refreshed recommendations for 2025</li><li>• First draft of Year 4 EWG Report issued</li></ul>
September	<ul style="list-style-type: none"><li>• Final draft of Year 4 EWG Report issued in early September</li><li>• RIE decides which equity strategies and metrics to adopt in 2025 plan</li></ul>



# 2024 Equity Working Group – Q1 Details

## + January

- + Introduction to 2024 EWG, review goals and objectives for Year 4
- + RIE provides overview of what equity *strategies/actions* it can or cannot adopt for remainder of 2024
- + The EWG members & RIE will discuss what should be prioritized out of strategies list; the Company will give its view and EWG members will give their view

## + February

- + RIE and EWG come to final agreement on *strategies/actions* to adopt in 2024
  - + Additionally, identify long term strategies and metrics that may not be feasible in 2024, but are a high priority for the EWG and long-term program goals for Company
- + Tie metrics to adopted strategies and review metrics feasibility assessment to begin metrics conversation

## + March

- + Continue metrics discussion and select shortlist of metrics to track based on feasibility and priority
- + Establish commitment and plan for RIE to track metrics beginning in Q2 2024

# Questions and discussion

- + General feedback and questions from Council
- + Questions to consider for discussion:
  - Do the 2024 EWG objectives align with the Council's expectations? Would you add or change anything for the EWG's consideration?
  - Does the Council have any questions, comments, or concerns for GHFI as the facilitator of the EWG?
  - Does the Council have any additional feedback on the Company's Q1 plan to select equity strategies and metrics to adopt?

# Appendix



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# Equity Issue / Challenge: Participation Barriers

- 1) Increase participation rates from residents living in the 5 Equity Communities (or Justice40 or EJ Communities) across the EnergyWise and IES Programs by XX% by the end of 2024
  - **Feasible to do, needs more investment to automate:** we would need to establish a baseline first to track this
  
- 2) Track the # of HEAs in other languages
  - **Feasible to do, needs more research:** need to understand how we could track given our current processes
  
- 3) Offer Home Energy Assessments (HEAs) in at least 4 languages other than English (e.g. Spanish, Portuguese, Chinese (Cantonese/Mandarin), Creole) by the end of 2024
  - **Clarification needed:** looking for more specifics here
  - Language translation lines currently being used

# EWG Suggested Metrics: Participation Barriers

## Scoring

- **(4 pts)** Data is tracked, and reporting is easily available
- **(3 pts)** Data is tracked or gathered at some level, but reporting requires resources and effort
- **(2 pts)** Data is not tracked, but can be collected with resources and effort
- **(1 pt)** Data is not tracked, and is currently difficult or impossible to collect

Suggested metric	Feasibility to track
# of participants broken down by primary household language	4
# of new partners	3
Increase # of participants who receive a HEA in Spanish & Portuguese by X%	2
# of HEAs in languages other than English	2
# of referrals from CBOs/partners	2
Increase # of participants who receive Wx after receiving a HEA in Spanish or Portuguese by X%	2
# of stakeholder events vs # of stakeholder events in EJ communities	2
# of HEA customers that learned about or signed up at an outreach event in each outreach service area	2
# of Participants broken down by income, race, primary language, etc; <i>NOTE: this is treated as 3 separate metrics</i>	1
Increase # of participants in EJ Communities by X%	1
# of Participants residing in Environmental Justice communities vs. Non-EJ communities	1
Incentives spent in EJ vs non-EJ communities	1
% of eligible customers reached at events	1
% of marketing and education interactions w/ customers mirrors the % distribution of customer groups	1

# Equity Issue / Challenge: Multifamily Barriers

- 1) Increase participation rates in EnergyWise Multifamily and Income Eligible Multifamily Programs statewide by XX% over 12 months - We can show this: would need to pull out historical participation data // we have served a lot - something that may not be visible
  - **Feasible to do, needs more research**
  
- 2) Increased focus on renter-specific resources, including but not limited to information on what is available for renters and renter-friendly DIY home improvements that can cut down on energy use
  - **Feasible to do, needs more research:** we do not currently collect this level of information on renters, but we will look into this

# EWG Suggested Metrics: Multifamily Barriers

## Scoring

- **(4 pts)** Data is tracked, and reporting is easily available
- **(3 pts)** Data is tracked or gathered at some level, but reporting requires resources and effort
- **(2 pts)** Data is not tracked, but can be collected with resources and effort
- **(1 pt)** Data is not tracked, and is currently difficult or impossible to collect

Suggested metric	Feasibility to track
# of landlord EE workshops	2
# of landlords reached	2
# of renters reached	2
# of new areas of feedback	2
# of customers providing feedback	2
# of new MF participants	2
# of new MF participants/demo \$ spent	2
Total associated customer energy savings (\$)	2
Conversion rate of contacts to participants (%)	2
\$ spent on renter populations/landlord engagement	2
Incentives spent on rental properties vs. ownership properties (separate for SF and for Condos)	2
# of points of contact before participation	1

# Equity Issue / Challenge: Pre-Weatherization Barriers

- 1) Close the gap in the Conversion to Weatherization ratio between Energywise and IES programs by XX% over the next XX months.
  - **Currently unable to do:** this is not realistic as IES has far more expensive pre-weatherization barriers. Some future work would be to improve data collection on IES side.
  
- 2) Provide additional funding for pre-weatherization barrier remediation.
  - **Already doing:** We are conducting tests with IE heat pump work. Coordinating with OER on additional IRA funding.
  
- 3) Engage with the new State Department of Housing, cities/towns code officers, and/or housing courts. Better coordination between agencies can potentially address the pre-Wx issue.
  - **Feasible to do, needs more research:** Would need to improve data collection on IES side.



# Equity Issue / Challenge: Workforce Development

- 1) Increase the % of BIPOC workforce training participants and contractors that reside in the 5 Equity Communities (or Justice 40/EJ Communities) year over year by XX%
  - **Feasible to do, needs more research:** need to establish target and feasibility of any additional tracking to be done
  
- 2) Increase # of and capacity of minority contractors by XX% in 2024.
  - **Clarification needed:** is this referring to RIE contractors, or more broadly in the industry? How might we measure capacity?
  
- 3) Increase the # and size of contracts awarded to MWBEs by XX% in 2024.
  - **Clarification needed:** is this referring to RIE, or more broadly in the industry?
  - **Already doing:** Report the number of MWBE contractors. Need to research the # and size elements.

# EWG Suggested Metrics: Workforce Development

## Scoring

- **(4 pts)** Data is tracked, and reporting is easily available
- **(3 pts)** Data is tracked or gathered at some level, but reporting requires resources and effort
- **(2 pts)** Data is not tracked, but can be collected with resources and effort
- **(1 pt)** Data is not tracked, and is currently difficult or impossible to collect

Suggested metric	Feasibility to track
# of contracts awarded to MWBEs compared to the total # of contracts awarded overall	2
\$ spent on MWBE contracts vs \$ spent overall on all contracts	2
% of jobs by MWBEs	2
Size of jobs for MWBEs vs Non MWBEs	2
# of graduates (RIBA'S RCWP)	2
# of graduates employed with the CAP agency (RIBA'S RCWP)	2
Demographics of participants/graduates (income, race, location, etc.) (RIBA'S RCWP); <i>NOTE: this is treated as 3 separate metrics</i>	2
# of jobs created (RIBA'S RCWP)	2
\$ spent on workforce offerings (RIBA'S RCWP)	2
# of participants from EJ communities in EE-related job trainings, programs, apprenticeships, STEM education, tuition, scholarships, etc. (RIBA'S RCWP); <i>NOTE: this is treated as 6 separate metrics</i>	2

# Equity Issue / Challenge: Microbusiness and Small Business

- 1) Leverage findings from the 2023 Small Business Process Evaluation to improve program strategy
  - **Feasible to do**
  
- 2) Conduct Main Street efforts in all five communities identified in the 2024-2026 EE Plan Narrative
  - **Feasible to do:** In 2024 we committed to conducting MAIN STREET campaigns in 3 of the 5 communities, including conducting two campaigns in each of the largest towns (e.g. Providence, Pawtucket).
  
- 3) Develop translated program materials, as suggested in the SBDI Process Evaluation
  - **Feasible to do:** Working with Creative Services/Marketing on website PDF versions in Portuguese and Spanish

# EWG Suggested Metrics: Microbusiness and Small Business

## Scoring

- **(4 pts)** Data is tracked, and reporting is easily available
- **(3 pts)** Data is tracked or gathered at some level, but reporting requires resources and effort
- **(2 pts)** Data is not tracked, but can be collected with resources and effort
- **(1 pt)** Data is not tracked, and is currently difficult or impossible to collect

Suggested metric	Feasibility to track
SBDI participation by zip code or census tract	4
Total eligible SBDI customers by zip code or census tract	3
Unique C&I customer accounts by consumption category (e.g., less than 250,000 kWh, 250,000-500,000 kWh...)	3
C&I participation by consumption category (e.g., less than 250,000 kWh, 250,000-500,000 kWh...)	3
Number of RI Energy and RI Energy vendor staff that speak languages other than English with prevalence in RI (disaggregated by language)	3
Total SBDI participation by customers who report to speak languages other than English	1

# Equity Issue / Challenge: Metrics Tracking/Reporting

- 1) Based on RI EWG member feedback, Rhode Island Energy continues to miss the mark on sharing meaningful metrics and progress. For example, the metrics from Year 2 for Workforce Development & Training were not reported on by the utility, but instead very brief updates on their quarterly equity update reports. In addition, the lack of a sufficient baseline of data hinders working group members ability to better inform recommendations, actions, metrics, and targets. In order to better share progress over time and identify issues and solutions, members agreed that the Company must develop a more comprehensive template to better report on equity and targets in quarterly and annual reports.
  - **Feasible to do, needs more research:** We have committed in our plan to establishing a set of trackable equity metrics by the end of Q1 2024 to begin tracking in Q2. We will begin the conversations in Q4 2023.