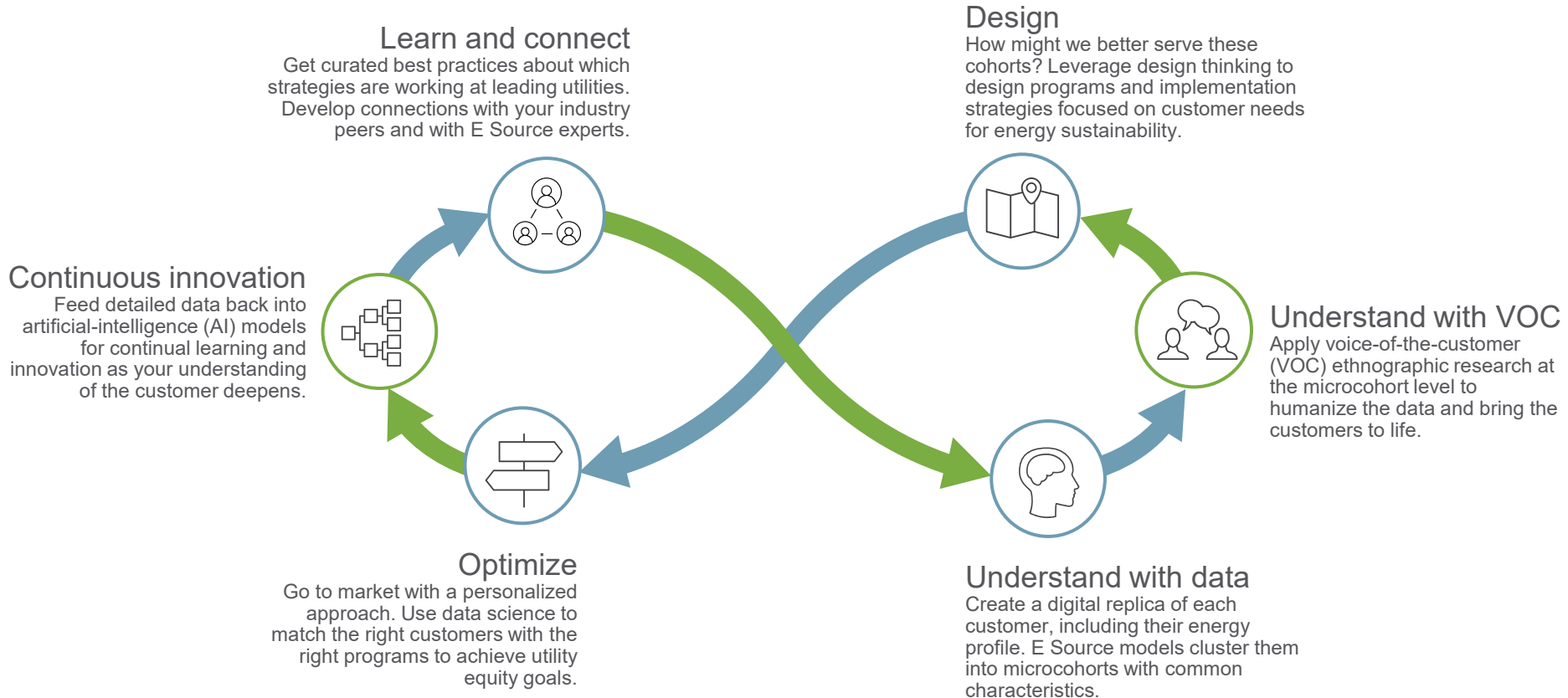# Integrating energy equity into your utility's customer programs and engagement

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E Source
POWERING WHAT'S **NEXT**

E Source energy-equity solutions

Learn and connect
Get curated best practices about which strategies are working at leading utilities. Develop connections with your industry peers and with E Source experts.

Design
How might we better serve these cohorts? Leverage design thinking to design programs and implementation strategies focused on customer needs for energy sustainability.

Continuous innovation
Feed detailed data back into artificial-intelligence (AI) models for continual learning and innovation as your understanding of the customer deepens.

Understand with VOC
Apply voice-of-the-customer (VOC) ethnographic research at the microcohort level to humanize the data and bring the customers to life.

Optimize
Go to market with a personalized approach. Use data science to match the right customers with the right programs to achieve utility equity goals.

Understand with data
Create a digital replica of each customer, including their energy profile. E Source models cluster them into microcohorts with common characteristics.

Case study: Equitably serve LMI customers

Create energy sustainability for low- and moderate-income (LMI) customers by better understanding and serving them as an audience of one

The problem:

- One segment for all LMI customers isn't equitable, nor is it serving customers or the utility well

- The ability of LMI customers to pay their utility bills, coupled with the lack of participation in customer programs compounds the equity issue

- Historically, utilities haven't understood LMI customers at a granular level to enable services to better address energy sustainability

E Source's data-driven approach uses:

- **Thought leadership** from our research experts

- **Data science** to define microcohorts

- **Ethnography** to bring those microcohorts to life with deep customer understanding

- **Design thinking** to develop solutions for unique microcohorts

- **AI** to engage microcohorts in a more personal manner to help them achieve energy sustainability

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In your role, how are you addressing energy equity?
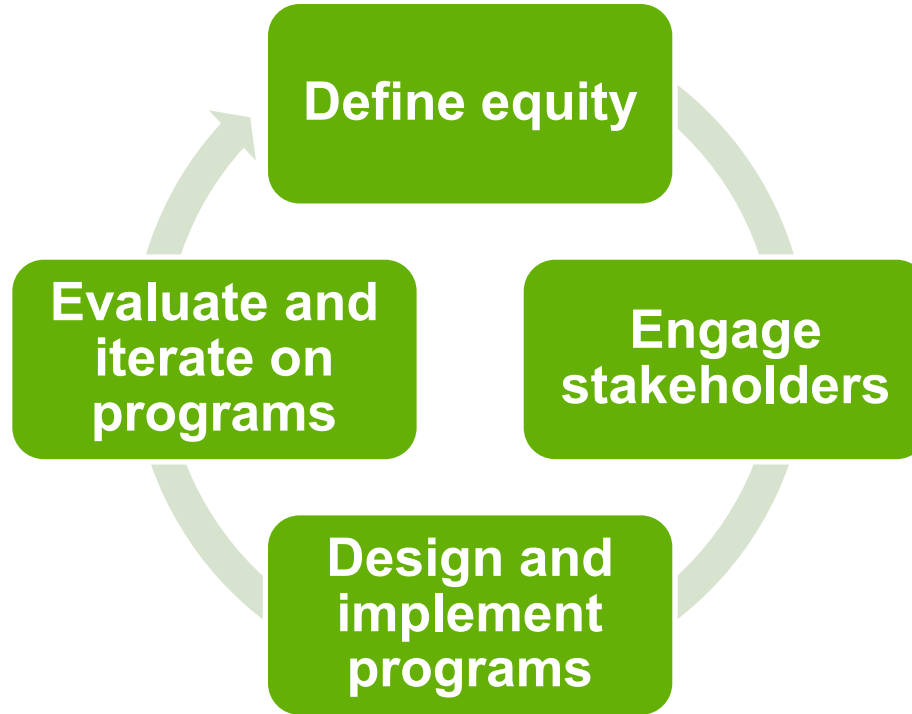
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What is energy equity?

"At a moment when climate action and clean energy programs are expanding rapidly, it is imperative that access to the benefits of these programs are distributed equitably, particularly for Black, Indigenous and People of Color (BIPOC) and frontline communities historically overburdened by the costs and pollution of our energy system. Historically, the energy sector echoes racial and class disparities in housing, education, and economic development. Despite the semblance of uniform utility rates and ubiquitous service, the negative outcomes of power shut-offs and cost burdens—and the positive benefits of weatherization, retrofits, and renewable energy—are not evenly distributed."

—[The Energy Equity Project](link) (PDF)

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Why pursue energy equity?

- New savings opportunities; expand program customer base

- Reduce financial risk passed on to you and your customers

- Increase non-energy benefits for all customers

- Bolster your utility's reputation; build trust with all customers

- Respond to forthcoming state and local legislation

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E Source energy-equity framework

Define equity

Engage stakeholders

Design and implement programs

Evaluate and iterate on programs

Define equity

Location and housing
- Housing/building stock value/age
- Homeownership
- Local pollution
- Climate-change impacts
- Heat island effect in neighborhoods

Demographics
- Income/energy burden
- Race/ethnicity
- Age/disability
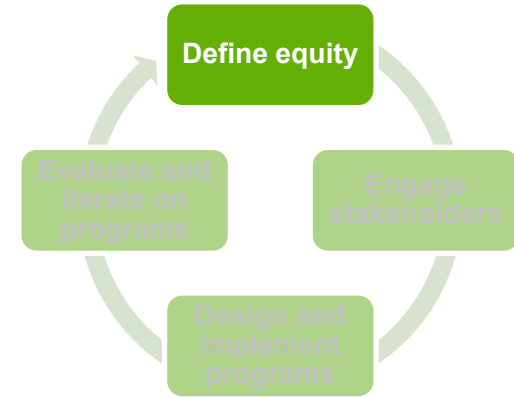- Language/information access
- Minority-owned businesses

Access to resources
- Employment
- Mobility access; EV infrastructure
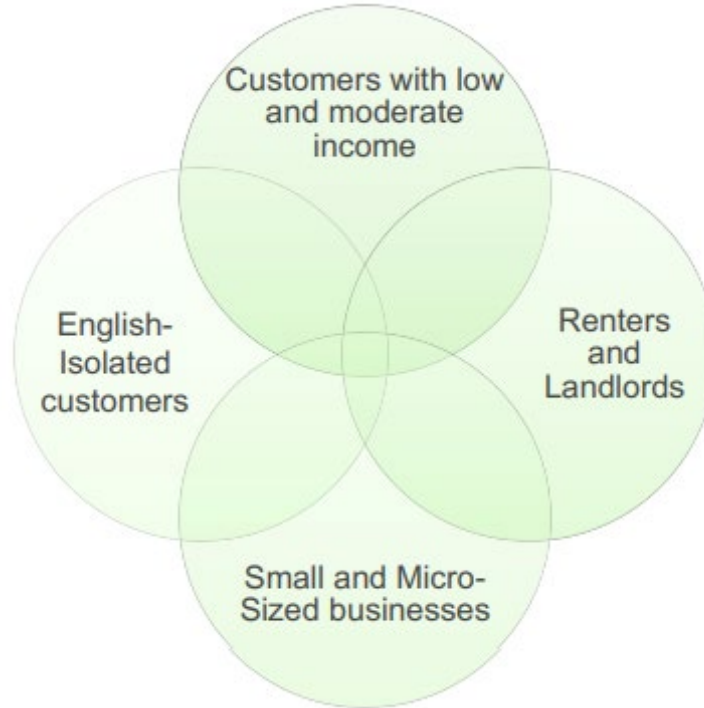- Local grid infrastructure quality
- Access to healthcare
- Rural

Define equity

Evaluate and iterate on programs

Engage stakeholders

Design and implement programs

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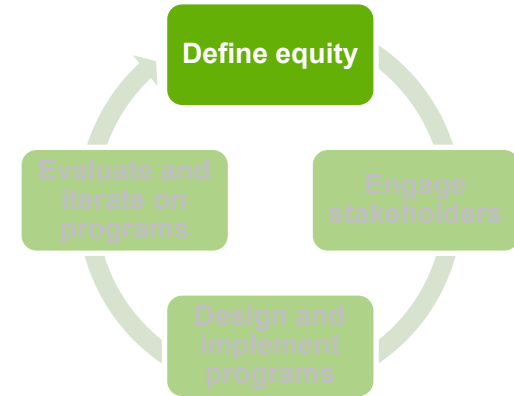
Define equity

What problem are you aiming to solve for customers?

Utility definitions

Mass Save's target communities

Customers with low and moderate income

English-Isolated customers

Renters and Landlords

Small and Micro-Sized businesses

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Engage stakeholders

- Collaborating utilities

- State and local governments

- Regulators/public utility commissions

- Community-based organizations and community action partners

- Community advocates

- Schools

- Business associations

- Housing authorities

Define equity

Engage stakeholders

Evaluate and iterate on programs

Design and implement programs

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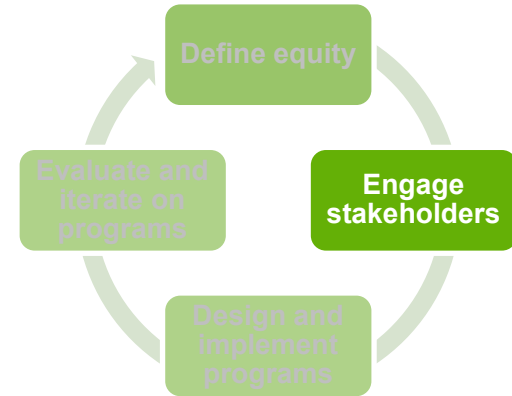
How are you engaging customers and community-based organizations in your efforts?

How are you working collaboratively with other utility departments?

Utility partnerships

Mass Save's Equity Working Group members:

- Massachusetts Department of Energy Resources
- 5 voting councilors
- 4 utility reps
- Council consultants
- 2 reps from Low-Income Energy Affordability Network (LEAN)
- Green Justice Coalition
- 30+ additional stakeholders

City of Austin's Community Climate Ambassadors:

- 12 ambassadors from underserved communities
- Ambassadors engaged their communities in conversations about climate change
- Integrated findings into the city's Climate Equity Plan

Design and implement programs

Demand-side management
- Energy efficiency
- Demand response
- Weatherization
- Behavior

Distributed energy resources and transportation
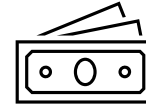- Solar
- Storage
- EVs

Information accessibility
- Marketing and communications
- Digital channels
- Education

Bill affordability
- Payment plans/options
- Rate/billing assistance
- Helping/connecting customers with other social services

Utility operations
- Internal diversity, equity, and inclusion (DEI) initiatives
- Philanthropy
- Workforce development
- Supplier diversity

Define equity

Engage stakeholders

Design and implement programs

Evaluate and iterate on programs

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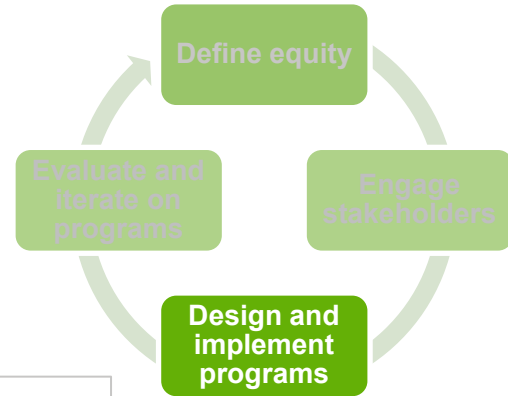
How are you designing and implementing equity-focused programs?

Equity-focused energy programs

Energy efficiency

- Weatherization and equipment incentives: Mass Save
- Small business financing: Energize Connecticut

Distributed energy resources

- Solar plus storage: PG&E and Southern California Edison
- Smart grids: Portland General Electric

EVs and mobility

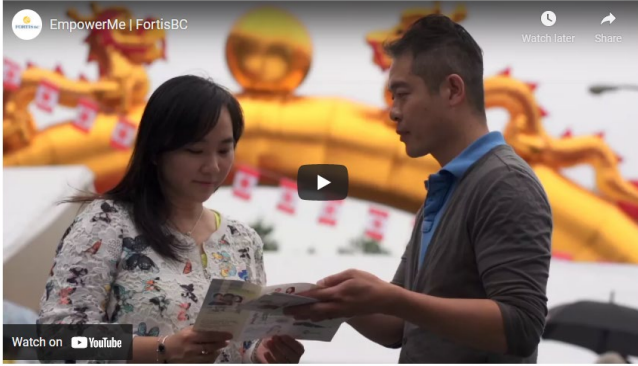- Transportation electrification: Xcel Energy and Seattle City Light
- EV make-ready programs: Con Edison and NYSEG

Define equity

Engage stakeholders

Evaluate and iterate on programs

Design and implement programs
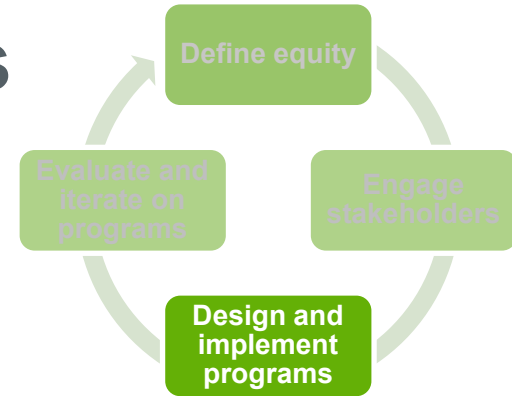
Source: Con Edison

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Multilingual programs

Empower Me

Empower Me is one-on-one energy conservation program that is specifically for South Asian, Chinese, Korean and Persian families who are interested in creating a safer and more comfortable home while reducing energy bills. The program is delivered in the participant's native language and focuses on
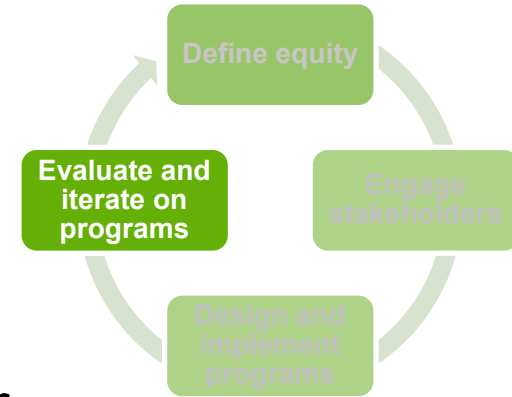
FortisBC Empower Me
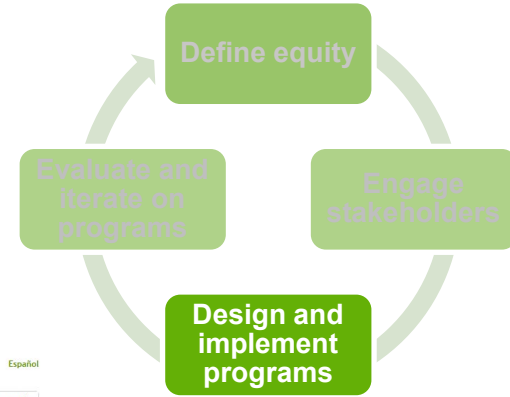
SoCalGas Community Language Efficiency Outreach (CLEO)

Define equity

Evaluate and iterate on programs

Engage stakeholders

Design and implement programs

Evaluate, report, and iterate on programs

- Los Angeles Department of Water and Power [Equity Metrics Data Initiative](...)

- Hawaii Energy equity evaluation metrics [Program Year 2018 Annual Report](...) (PDF)

- Energy Trust of Oregon [Progress toward diversity, equity and inclusion goals](...) (PDF)

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How are you evaluating, reporting, and iterating on energy-equity programs?

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Energy Trust's program evaluation metrics

1. Increase participation in energy-efficiency programs for all underserved populations and communities of color by 20%
2. Increase participation in programs for small and medium businesses in very rural areas by 20%
3. Increase participation in solar projects for low-income, rural and racially diverse communities by 20%
4. Increase overall market awareness and understanding of underserved populations through engagement with 50 culturally specific/culturally responsive organizations
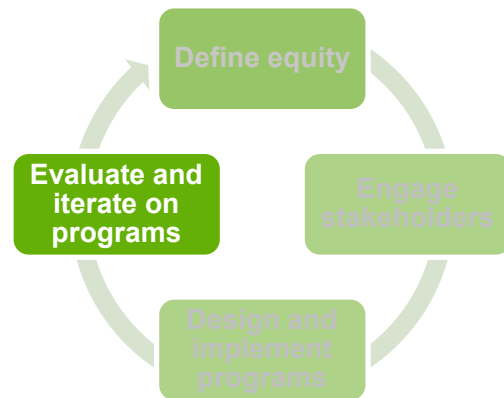
Goal 1: Increase customer participation in energy efficiency programs for all underserved populations by 20% by the end of 2020.

Goal 1A: Increase residential participation rate by 20% in communities of color by the end of 2020.[31]

Baseline	Results	2020 Target	Status
50,185 total participants from communities of color through 2017 (24% participation rate)	5,350 new participants in 2020 for a total of 65,658 participants from communities of color (31.4% participation rate)	60,593 total participants from communities of color through 2020 (a 20% increase to participation rate)	

Source: Energy Trust of Oregon annual report

E Source energy-equity research resources

Visit www.esource.com/energy-equity to learn about our energy-equity solutions for utilities:

- What utilities can do to improve energy equity
- Using an equity lens to reach more customers with DSM programs
- Partnering with disadvantaged communities to make emerging technologies more equitable
- Next-generation programs for an equitable clean-energy future
- Include non-energy benefits in cost-effectiveness tests to improve energy equity

On low-income programs:

- How are utilities scaling their low-income programs?
- Using solar programs to help low-income customers during COVID-19
- Community solar pilots and programs: A catalog of current and recent utility initiatives
- How to use electric transportation to support low-income customers during and after COVID-19
- Can low-income consumers benefit from EVs? Yes, but maybe not in a traditional way

Additional energy-equity resources

Advocacy
- [Energy Equity Project](#)
- [Initiative for Energy Justice](#)
- [WE ACT for Environmental Justice](#)
- [Energy Efficiency for All - Equity Working Group](#)
- [Partnership for Southern Equity - Just Energy](#)

Research
- [ACEEE Leading with Equity Initiative](#)
- [Urban Institute and the Green & Healthy Homes Initiative](#)
- [Pecan Street Center for Race, Energy & Climate Justice](#)

Institutional partners
- [Urban Sustainability Directors Network](#)
- [Northeast Energy Efficiency Partnerships](#), [Southeast Energy Efficiency Alliance](#), [Southwest Energy Efficiency Project](#), and [Midwest Energy Efficiency Alliance](#)
- [US Department of Energy](#) and [US Environmental Protection Agency](#)
- [Pacific Northwest National Lab](#) and [National Renewable Energy Lab](#)

Upcoming E Source events

[Spring 2022 Data Science Leadership Council](#)
Energy equity: Marrying data science and human connections to achieve equitable outcomes

April 4–6, 2022
Hyatt Place Charleston Historic District | Charleston, South Carolina

Stay tuned for info on our next energy-equity exchange!

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