Equity Advisory Committee Meeting #4 Summary

On February 12, 2026, the California Energy Efficiency Coordinating Committee's (CAEECC) Equity Advisory Committee (EAC) met via Zoom.[1] Attendees included:

- EAC Members : Brooke Wright (Environmental Innovations), Julia Hatton (Rising Sun Center for Opportunity), Chris Pilek (Resource Innovations), and Amaury Berteaud (AMBAG).
- CAEECC Members: Ely Jacobsohn (CPUC), Dan Suyeyasu (CodeCycle), Margaret Marchant (Frontier Energy), Chris Ruch (SMW Local 104), Nancy Barca (Frontier Energy), Natalie Espinoza (TEC), and Pamela Rittelmeyer (CPUC).
- Other Interested Stakeholders: Berenise Alfaro, Emily Lange (Cascade Energy), Jennifer Green (MCE), Yeshi Lemma (CPUC), Aaron Jones (Frontier Energy), Amanda Harvey (Frontier Energy), Ana Zapata (CPUC), Emily Carter (Frontier Energy), Hilary Quinn (NREN), Jan Maes (Sierra Energy Reimagine), Jesse Farber Eger (Frontier Energy), Jim Dodenhoff (Silent Running), Karla Soriano (Opinion Dynamics), Kristin Larson (Frontier Energy), Mara Portlock (SCE), Melanie Stutler (Resource Innovations), Storm Selsor (DNV), Timaree Nelson, Antoinette Siguenza (PGE), and Heather Iwamuro (CPUC).

This meeting was facilitated by Michelle Vigen Ralston (Ralston) and Suhaila Sikand (Sikand) of Common Spark Consulting. Supporting meeting materials are available at: https://www.caeecc.org/2-12-2026-eac-meeting-4.

Overview of Meeting

EAC Members gathered to refine the remaining Equity Best Practices recommendations for PAs, CAEECC, and Energy Division. Next steps include:

- Members of the Public and CAEECC Members will be invited to provide feedback on the next draft of recommendations via the CAEECC listserv.

- The Facilitation Team will gather more information on the following topics for discussion at the next meeting:
    - Community-based Design Collaborative
    - Non-energy Impact Proceeding
    - Non-energy Benefits Working Group

This meeting was well attended by CAEECC Members, PAs, and the Public. Additional Public discussion is included in *Appendix B*.

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[1] This meeting summary is intended to capture the overarching discussion of ideas, concerns, alternative options for proposals and consensus, and as such, substantive agenda items are included.For more detailed discussion, please reach out to the Facilitation Team. See Appendix A for acronyms relevant to this meeting summary.

Refining Draft Recommendations

Sikand and Ralston provided an overview of the draft recommendations and changes made since EAC Member edits on 1/31/26. Ralston invited discussion on outstanding recommendations for the rest of the meeting. Key themes are summarized below.

Recommendation 1.2 - Clarify desired coordination and collaboration with Income-Qualified Programs

- This recommendation should be reframed to clarify to all parties that low-income customers should be allowed to participate in any programs they are eligible for, and that collaboration with ESA should ensure they receive the fullest benefits of any and all programs available.
- The challenges experienced in EE programs, and especially Equity segment programs, with ESA include:
  - The sense or assumption that ESA is the only program that can serve low-income customers (a change since 2025).
  - The customer loses out on opportunities to get no-cost EE Equity programs because they participate or are eligible for ESA.
  - Only allowing ESA to serve low-income customers causes limitations on the number of HTR and DAC customers served and level of service by EE programs.
  - Customers eligible for ESA are, since 2025's "direction", being turned away from EE Equity programs because their income is *too low,* when low-income is often also an HTR and DAC qualifier.
  - Customers are having to choose to participate in one program over another.
  - ESA programs may not have contractors who are available and ready to serve ESA customers, so instead of being served immediately by an EE Equity program when they are ready to engage, low-income customers may have to wait for ESA, perhaps to a point beyond their interest or ability to engage.
  - EE programs that refer customers to ESA don't get credit for the referral, even if it was their outreach and marketing and offerings that successfully engaged that customer in the first place.
- PAs are reporting lots of data in CEDARS and the EAC (or other stakeholders) should figure out how to leverage this data to analyze equity outcomes.
- Joint Cooperation Memos are simply coordination memos that outline how a PA will interact with another. It should be clarified how EE and ESA programs should coordinate without blocking their respective ability to engage with customers.
- NREN recently used an ESA Monitoring Plan alongside a JCM to ensure there's no overlap with ESA. NREN made a follow-up process to this to check if the NREN referred customer is being served by ESA and if not, to bring that customer back to NREN's programs. A referral program by ESA to EE programs could be helpful.

- RENs don't do income qualifications, so there is a potential delay in determining if a customer needs to be referred to ESA until data is collected from the customer.
- CBOs would appreciate clarity on how they can support recruitment and participation of community members into different programs. Figuring out how to ensure vulnerable communities are ready for the transition to heat pumps will be an important step.

Recommendation 2.1 - Align equity-specific Key Performance Indicators (KPIs) with broader utility and implementer KPIs to ensure equity efforts are recognized and integrated, not seen as added costs or in conflict with one another.

- The EAC should leverage Business Plan metrics to track Equity program objectives and targets. This includes creating a standard definition of "service" across parties (customers, implementer, and utility). Currently each stakeholder defines "service" in different ways—could be a successful referral, achieved energy savings, participation in training, etc.
  - Metrics could include first-net-therm and first-net-kWh of HTR customers, percent of residential/commercial customers that are HTR, etc. The EAC/CAEECC should assess and agree upon what is a "successful" outcome of Equity programs.
- Equity programs today are focused on outreach and education to expand access to energy efficiency upgrades to Equity customers. There needs to be a way to also measure if the overall EE portfolio (including Resource Acquisition programs) is becoming more or less equitable. The concern is that if all equity work is segregated only in the Equity segment, then equity is decreasing overall and savings opportunities are not expanding in other parts of the portfolio.

General Recommendation - Create a facilitated space for continued conversation and best practices.

- This conversation isn't easy, but it's important. A shared safe space is needed to continually improve the equity and impact of the EE portfolio.
- The EAC is still a pilot, perhaps a longer term / permanent EAC is needed.
- There used to be more equity representation on CAEECC, but CAEECC is time consuming.
- A session at the annual California Climate and Energy Collaborative (CCEC) forum could be useful.

Recommendation 2.3 - Improve tracking, reporting, and cost-effectiveness/valuation metrics to include how Equity programs contribute to other EE (Resource Acquisition and/or Market Support) programs. Giving credit where it is due to Equity programs would offer clearer understanding of the Equity segment value across the portfolio.

- This recommendation is unique from Recommendation 1.2. This recommendation considers if an Equity program can be credited for referring a customer to another program. This could be achieved by checking a flag in the

CEDARS system that indicates it was substantially supported by another program, e.g., Equity segment program.

- Recommendations on how to appropriately value programs from the CEC Non-Energy Impact proceeding and CPUC Non-Energy Benefit Working Group study would be helpful.
- A new framework is needed to think about how to track the benefit of delivering real bill savings for low-income customers. Current frameworks limit capturing full benefits, especially from buildings that fall below the baseline codes and standards. An estimated $5B in savings are not accounted for or are stranded (unaddressed) because of noncompliance to baseline standards; noncompliance is likely concentrated in low-income communities. Many, especially low-income customers, HTR, and those in DAC, are not receiving needed upgrades because the EE programs can't claim the savings and the cost-effectiveness doesn't pencil.
  - This new framework should build upon the establishment of standard definitions and understanding of "success" in the Equity program as described in Recommendation 2.1.
- There is a disincentive by some Equity program PAs to do some measures (like the Green House Calls that Rising Sun Center for Opportunity implements) because EE programs are restricted to counting savings beyond baseline, but ESA is focused on simply delivering energy efficiency and other bill-saving measures.

Recommendation 3.3 - In order to implement best practice recommendations from implementers, stakeholders, and customers, create a statewide cross cutting equity pilot program in the Energy Efficiency portfolio to organize and oversee integration of innovative Equity program design and best practices to maximize Equity customer participation within existing RA programs.

- This recommendation is meant to solve for implementers who keep recreating the wheel on Equity programs because there's no shared approach, best practices, or lessons learned. Instead, a coordinated effort to elevate and facilitate implementation of best practices should be supported.
- There needs to be a way for Equity programs to tell the story of their program operations and impact with the rest of the portfolio. While PAs are not funded to do this, case studies offer learning opportunities.
  - There should be an anonymized safe space to allow the full story (challenges, successes, shortcomings, etc) to be shared and impactful best practices to be created from them.
- Rather than setting up a "program" that would draw funds away from the Equity and Market Support segment budget, explore other ways to provide financial support for participation in a more permanent, EAC-like body and initiative (e.g., CPUC authorized funding).

Next Steps

Ralston proposed a recommendation refinement and final EAC memo drafting plan. In addition, Ralston and the EAC invited public feedback and input on the next draft of recommendations. An invitation for feedback through a survey or other means will be shared via the CAEECC listserv. The next EAC Meeting will be on March 17, 2026.

Appendix A: Key Acronyms

Key acronyms used in this document include California Energy Efficiency Coordinating Committee (CAEECC), California Public Utilities Commission (CPUC), Energy Division (ED), California Energy Commission (CEC), California Air Resources Board (CARB), energy efficiency (EE), working group (WG), disadvantaged communities (DAC) and hard-to-reach (HTR) communities, justice equity diversity and inclusion (JEDI), CPUC's Environmental and Social Justice Action Plan (ESJ Action Plan), Portfolio Administrator (PA), Investor-owned utilities (IOU), Regional Energy Network (REN), community-based organization (CBO), market transformation (MT), Equity Metrics Working Group (EMWG), Market Support Metrics Working Group (MSMWG), evaluation measurement and verification (EM&V), Ordering Paragraph (OP), Disadvantaged Communities Advisory Group (DACAG), Low-Income Oversight Board (LIOB), Evolving CAEECC Working Group (ECWG), Compensation Task Force (Compensation TF), and Mid-Cycle Advice Letters (MCALs).

Appendix B: Public Questions and Discussion

This EAC Meeting had the highest attendance of any EAC Meeting by CAEECC Members, PAs, and Members of the Public. As such, the Facilitation Team provided time for public input before the EAC refined recommendations. Below are key themes from that discussion:

- Given the political climate, *Strengthen Use of Data and Evaluation for Equity* Recommendations are especially important so that program eligibility and verification processes do not endanger communities.
- Recommended specific metrics PAs can use to track WE&T outcomes. E.g., analysis of participants in programs (demographic representation, income, amount of training, graduation rates, placement rates, graduation rate metrics) or employers (number of small BIPOC / women owned contractors engaged, number of union contractors engaged, number of jobs created/ placement of jobs, quality of jobs (wage + benefits, wages pre/post training, employment rates pre/post training).
- PAs could require implementers to integrate labor standards to uplift job quality and quality of installations into portfolios. Rising Sun Center for Opportunity is soon releasing a *Contractor Support Guide* describing how PAs can support high road contractors to participate in their programs successfully.