

Equity Advisory Committee

Meeting #2 Summary¹

September 17, 2025

On September 17, 2025, the California Energy Efficiency Coordinating Committee's (CAEECC) Equity Advisory Committee (EAC) met for its second meeting. The webinar was hosted online via Zoom. All members of the EAC were in attendance: Amaury Berteaud of Local Government Sustainable Energy Coalition (AMBAG²), Brooke Wright of Environmental Innovations, Chris Pilek of Resource Innovations, and Julia Hatton of Rising Sun Center for Opportunity. This meeting was facilitated by Michelle Vigen Ralston (Ralston) and Mahal Garcia Liu (Garcia Liu) of Common Spark Consulting.

Supporting meeting materials are available at: <https://www.caeecc.org/eac>

Overview

Key Meeting Takeaways:

- EAC Members reiterated the need to simplify and streamline program eligibility and coordination.
- EAC Members emphasized building participant trust, including flexibility or allowances for targeted but ineligible customers.
- EAC Members discussed integrating equity into energy efficiency portfolio planning, flexibility for communities, and stronger workforce and community engagement.

High-Level Summary of Next Steps:

- The EAC will review and redline draft recommendations compiled by the Facilitation Team.
- EAC Meeting #3 is scheduled for November 12, 2025.

Members of CAEECC or the Public interested in attending a future EAC meeting reach out to Mahal (mahal@common-spark.com).

¹ This meeting summary is intended to capture the overarching discussion of ideas, concerns, alternative options for proposals and consensus; it is a high-level summary and not a transcript. For more detailed discussion, please reach out to the [Facilitation Team](#).
[See Appendix A: Key Acronyms](#) for acronyms relevant to this meeting summary.

² Berteaud also is a CAEECC member representing LGSEC.

Welcome & Introductions

Slides 1 - 7

Garcia Liu welcomed participants to the second meeting of the Equity Advisory Committee (EAC). Garcia Liu shared an overview of the meeting goals and agenda.

Recaps

Slides 8 - 13

Garcia Liu reviewed Meeting #1 key takeaways and action items. Meeting #1 introduced EAC Members to one another, discussed the scope of work (SOW), and previewed the EAC process. Meeting #1 also provided an overview of Equity segment programs using preliminary data from California Energy Data and Reporting System (CEDARS) to inform EAC about the scope and focus of current efforts. Garcia Liu reviewed discussion from the Q3 Full CAEECC Meeting Equity Highlights session.

Members discussed:

- **Overlap between EE Equity Programs and ESA:** A Member noted that making ESA the only program that can serve low-income (LI) customers is problematic. This topic was also raised in a recent protest by CalPA regarding Equity Metrics.
 - *A Member of the EAC, Amaury Berteaud, shared via Zoom Chat: Referring back to our ESA conversation, this is what the decisions said: "We also clarify that the "equity" category is distinct from our separate low-income energy efficiency Energy Savings Assistance (ESA) programs, which have separate goals and regulatory treatment. While there is some overlap in customers within the target segments, the "equity" category is intended to be defined within the energy efficiency programs covered in this rulemaking that are not specifically targeting low-income populations with program offerings that low-income populations could receive at no cost from the ESA program."*
 - *A Member of the EAC, Amaury Berteaud, shared via Zoom Chat: [D.21-05-031](#) [page 15] was the decision that created the equity and market support construct*
- **History of Equity Programs:** Members discussed the tension and foundation of not serving customers that are not income-qualified—such as RENs serving HTR and underserved communities— which is a broader regulatory question.

Meeting #1 Follow-Ups

Slides 14 - 29

Garcia Liu shared CEDARS program analysis updates that were requested at EAC Meeting #1. Garcia Liu also overviewed [Non-Energy Benefits \(NEB\) study](#) efforts.

Members discussed:

- **CEDARS Workforce, Education & Training:** Members felt that to improve clarity in CEDARS, all statewide programs should clearly reference the owning PA within the implementation plan. Additionally, program names should include a label such as “Statewide under [PA name]” to ensure consistent identification and tracking across entries.
 - *A Member of the EAC, Julia Hatton, shared via Zoom Chat: [Energy Efficiency Workforce Education Training and Workforce Standards](#); [Energize Careers Career & Workforce Readiness](#); [PG&E’s Career & Workforce Readiness Solicitation](#);*
- **Program Classification:** Members raised challenges in classifying programs as Equity or Market Support, noting that PAs make decisions on classification as they are writing their business plans. PAs might establish a program’s category based on the program objectives but also cost-effectiveness profile, since Resource Acquisition programs have a cost-effectiveness requirement and there is a budget cap on Equity and Market Support programs. Members flagged that inconsistent interpretations of program types and policy have led to disconnects during reviews, with past feedback raising concerns.

Running List of Recommendations

Slides 30 - 38

Garcia Liu presented a draft list of recommendations to the EAC, developed from the notes from EAC Meeting #1.

The following questions/topics were raised in response:

Simplify and Clarify Program Eligibility

- **Customer Program Coordination:** Members discussed the possibility of coordination across programs for low-income (ESA) and hard-to-reach (HTR) customers targeted in an Equity program. Members questioned the effectiveness

of Joint Cooperation Memos (JCM) to support these efforts, citing it depends on the motivation of the JCM parties to coordinate on that issue.

- **Streamlining Eligibility:** Members emphasized that customers should have autonomy and discretion with identifying program eligibility, and which programs are a best fit for their situation. E.g., to offer a bulleted list of criteria and ask applicants to say whether they meet any of the criteria below, without specifying which criterion.

Build Trust with Program Participants

- **Customer Alignment:** Members recommended that implementers explain the purpose of programs to customers to see if they align with customer's needs and goals; this allows customers to recognize that other programs may better suit their needs.
- **Buffer for Ineligible Participants:** A Member suggested allowing a small percentage of targeted but ineligible participants to be served by a given program to reduce issues like the "resentful neighbor" effect, which creates distrust with EE programs.

Strengthen Data & Evaluation for Equity

- **Customer Experience Lifecycle:** Members discussed the value of Equity programs as a customer service and touchpoint role and their ability to contribute to overall customer satisfaction. Members acknowledged that Equity programs have a significant impact on the customer experience lifecycle and EE adoption.
- **Implementing Research:** Rather than introducing new research efforts, existing research findings from Equity programs should be implemented. Members pointed to the fact that implementation of best practices needs to be funded, not necessarily additional research.
- **Metrics:** Members discussed the adoption of more holistic Key Performance Indicators (KPIs). A Member flagged that the current CPUC Affordability Ratio does not account for customer household size or other living costs that scale; Affordability metrics based on this Ratio are not capturing customer reality.
 - *A Member of the EAC, Julia Hatton, shared via Zoom Chat: [CEC Energy Equity Indicators](#)*

Integrate Equity into Portfolio Design & Planning

- **Portfolio Design:** Members raised concerns about Equity programs being designed in silos at the same time as the rest of the portfolio, leading to missed opportunities for alignment and collaboration. Members also noted it's not clear that there is an agreed upon Level of Service that programs should achieve in communities that don't feel served.
- **Program Flexibility:** Members agreed on the importance of flexibility in program design, acknowledging that different microcommunities may have unique needs; one-size-fits-all approaches are ineffective. Implementers should have some leeway and flexibility to adapt or provide for program participants, such as use program or outside funding to address prerequisite health and safety or other program participation requirements.

Expand Equity through Workforce & Community Engagement

- **Cost-Effectiveness:** Current TRC and cost-effectiveness metrics were seen as misaligned with equity goals, especially regarding customer costs and workforce compensation. Use of these conventional cost-effectiveness metrics is a disservice, giving the perception that Equity programs provide a lower value for ratepayers. Benefits of Equity programs are not expressed or considered in the portfolio or evaluation.
- **Integration:** Members stressed integrating workforce training with program delivery, highlighting job placement, quality, and living wages as key equity considerations.

Members emphasized the need to allocate time and resources for developing actionable recommendations, including developing clear estimates of required investment to implement recommendations and boost Equity program adoption. A Member proposed a statewide, equity-focused program to be included in the energy efficiency portfolio as a vehicle to fund an effort, perhaps under the EAC, to support engagement, pilot best practices, and ensure recommendations are fully developed and implemented.

Next Steps

Slides 39 - 42

Ralston presented action items and next steps out of Meeting #2. The EAC Meeting #3 is scheduled for Wednesday, November 12, from 9:00-11:00am.

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).