

Equity Advisory Committee

Kickoff Meeting

July 28, 2025

On July 28, 2025, the California Energy Efficiency Coordinating Committee's (CAEECC) Equity Advisory Committee (EAC) met for its first meeting. The meeting was hosted online via Zoom. All members of the EAC were in attendance: Amaury Berteaud of Local Government Sustainable Energy Coalition (AMBAG*), 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 Miles (Miles) of Common Spark Consulting.

*Berteaud also is a CAEECC member representing LGSEC.

Overview

Key Meeting Takeaways:

- There is a strong need for better market research and data collection to inform equity program design and overcome current limitations in measuring impact, customer eligibility, and program effectiveness. Without funding for studies like market potential assessments, specific to equity programs, programs struggle to make a case for their value.
- To better recognize and support historically excluded groups, a growing number of terms like “equity,” “disadvantaged,” and “underserved” have been introduced. While rooted in positive intent, the increasing variety of terminology can create confusion and lead to shifting interpretations of eligibility.
- Reporting structures and cost-effectiveness metrics do not align with the goals of equity programs, making it difficult to capture their true impact and creating disincentives for implementers. Equity Key Performance Indicators (KPIs) should be integrated with/into utility KPIs to reflect shared goals and benefits.
- Equity programs face scrutiny and vulnerability due to their perceived higher costs and assumed lower conventional resource savings, due to the deeper engagement and outreach they require. These challenges are particularly acute for third-party implementers and programs under regulatory caps.
- There is interest in a recommendation positioning equity programs as pilots for broader best practices or even programs that could be adopted across the portfolio. Some suggest reframing these efforts not as separate, niche programs

but as models that can improve all program delivery.

High-Level Summary of Next Steps:

- The Facilitation Team will create a running recommendations list ahead of the September meeting to organize comments, suggestions, and ideas from the Kickoff Meeting.
- The Facilitation Team will run another analysis of equity segment programs in CEDARS ahead of EAC Meeting #2.
- The Facilitation Team will connect with the NEB Study Working Group, as they are already engaging in PA interviews.
- The EAC will attend the Equity Highlights session of the Q3 CAEECC Meeting, scheduled for August 13, 2025.
- EAC Meeting #2 is scheduled for September 17, 2025.
- Members of CAEECC or the Public interested in attending a future EAC meeting reach out to Mahal (mahal@common-spark.com).

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](#).

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).

Welcome & Introductions

Slides 1 - 5

Ralston welcomed and introduced participants to their first meeting of the Equity Advisory Committee (EAC). Miles shared an overview of the meeting goals and agenda.

Time Requests & Expectations

Slides 6 - 15

Ralston reviewed the EAC Scope of Work (SOW) and shared the near-term proposed process for the EAC.

Ralston then asked the committee to share initial thoughts on what they think would be important for the EAC to consider and/or present to CAEECC, the Portfolio Administrators (PAs), or Energy Division.

- A Member suggested that the EAC serve as a forum to generate ideas to share with the CPUC or PAs, such as recommending market potential studies.
- A Member asked: What is the goal of the equity segment and how do you measure success of the equity segment? Is it a way to get resources to communities? Is it firewalled from the Resource Acquisition (RA) segment, or is there an overall goal for the overall portfolio to serve equity customers better?
- A Member questioned how confident the group feels about future prospects for equity programs, and energy efficiency ratepayer programs in general.
- A Member noted that concerns about Immigration and Customs Enforcement (ICE) have impacted their team's engagement with small businesses. Some business customers view questions about primary language—used to determine eligibility for Hard-to-Reach (HTR) programs—as a potential risk, limiting participation. The Member wondered whether PAs need to have a stated policy that they will not work with ICE.
- A Member noted that regarding income verification, it is difficult to ensure that there is no duplication with the Energy Savings Assistance (ESA) program.
- A Member noted that implementers in other segments, such as RA or market support, could share recommendations on how to remove barriers to equity.

Overview of EE Programs

Slides 16 - 28

Miles overviewed the completed pre-committee Facilitation Team tasks that were outlined in the EAC Scope of Work. In order to support the EAC kickoff meeting discussion, the Facilitation Team prepared instructions on how to use the California Energy Data and Report System (CEDARS), conducted a preliminary analysis of the equity segment programs on CEDARS, and compiled links to existing dictionaries of relevant terms for California Energy Equity.

- Members provided feedback on the preliminary analysis of equity segment programs. Members noted that the Energy Savings Assistance (ESA) program is not regulated under the EE portfolio.
- A Member highlighted that portfolio support for the equity segment is administrative funding.
- A Member shared that it would be useful to differentiate how many statewide programs are truly separate, as opposed to being split into different entries for each of the utilities but with the same implementation plan.
- A Member recommended that CEDARS programs should be filtered to include “active” and “new” programs.
- A Member requested additional analyses to explore program budget and expenditure in addition to program counts.
- A Member explained that workforce programs include K-12 education, workforce education, training, and career and workforce readiness. The Facilitation Team confirmed that workforce programs predated the equity segment, and are now categorized as equity. A Member recommended looking at individual entries on CEDARS and seeing if they have the same implementation plan.
- A Member shared that the Disadvantaged Communities Advisory Group (DACAG) reviews all CPUC and CEC programs affecting disadvantaged communities under SB 350, noting that evolving and overlapping definitions of “underserved” and “disadvantaged” aim to broaden eligibility but can also create confusion and leave some groups out.
- A Member noted that eligibility requirements place a higher burden on low-income communities and suggested simplifying access. A Member emphasized that changing or unclear eligibility criteria undermines community trust, and stressed the importance of targeted outreach without narrowing access; guardrails are needed to prevent repeating past patterns of exclusion.
- A Member raised concerns about misalignment between equity program goals and traditional utility reporting structures, calling for alternative metrics and resources to better reflect impact.
- A Member noted that some equity programs serve as feeders into other resource acquisition (RA) programs, but this contribution is often overlooked due to limited tracking and lack of visible metrics. As a result, the true impact of equity programs may be underestimated.
- Members discussed the persistent challenges equity programs face under traditional cost-effectiveness frameworks, which undervalue equity impacts and make these programs vulnerable to scrutiny. Members emphasized the need to

align equity-specific KPIs with broader utility and implementer KPIs to ensure equity efforts are recognized and integrated, not seen as added costs. Members also noted that serving equity customers often requires more outreach and resources, creating disincentives—especially for third-party implementers with performance-based contracts. RENs were also cited as particularly vulnerable due to their strong equity focus.

- Members explored the potential for equity programs to be seen as a pilot for best practices. A Member noted that if a program could serve equity, it should stand to reason that it could serve everybody. Members explored renaming “equity” programs to “missed”, “gaps-in-success”, or “impact” programs. A Member wondered if rebranding might be a waste of time.

Announcements/Other Topics

Slides 29 - 36

- A Member shared that DACAG discussed challenges in getting CPUC to operationalize DACAG’s guidance, noting resistance. The DACAG letter to the CPUC regarding R.25-04-010, Order Instituting Rulemaking for Oversight of Energy Efficiency Portfolios, Policies, Programs and Evaluation, is the first attempt to follow the process of getting equity scoped into a proceeding from the very start.
- A Member asked whether the EAC will inform business plan applications from PAs and expressed interest in understanding how EAC will interact with the business plan process. A Member explained that there is a firm February 2026 deadline for applications, with guidance and templates expected by the end of August; many PAs are already working on business plans and community engagement, so early input from EAC is critical.
- A Member shared that it may be an interesting and useful request to also ask IOUs to explain 'what is equity to you?' and 'how will you measure success related to equity'?
- A Member shared that another question could be: how do you engage with community to create and design equity programs as part of the business plan process? As part of the implementation plan creation process? In an ongoing manner?

Next Steps

Slides 37 - 39

- The Facilitation Team will create a running recommendations list for the September meeting to organize comments, suggestions, and ideas from today.
- The next EAC meetings are scheduled for Wednesday, September 17, 2025 from 9-11am and Wednesday, November 12, from 9-11am.
- Members of CAEECC or the Public interested in attending a future EAC meeting reach out to Mahal (mahal@common-spark.com).