Equity Advisory Committee Meeting #5 Summary

On March 17, 2026, the California Energy Efficiency Coordinating Committee's (CAEECC) Equity Advisory Committee (EAC) met via Zoom.[1] Attendees included, but are not limited to:

- **EAC Members:** Brooke Wright (Environmental Innovations), Julia Hatton (Rising Sun Center for Opportunity), and Chris Pilek (Resource Innovations)
- **CAEECC Members:** Pamela Rittelmeyer (CPUC), Ely Jacobsohn (CPUC), Matthew Rutherford (PCE), Chris Ruch (SMW Local 104), Natalie Espinoza (TEC), Kristina Duloglo (CEC), and a representative from SCE
- **Interested Stakeholders:** Melanie Stutler

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/3-17-2026-eac-meeting-5.

Overview of Meeting

EAC Members gathered to refine the remaining Equity Best Practices recommendations for PAs, CAEECC Members, and Energy Division. EAC Members will review a revised draft of recommendations by April 3, 2026.

Refining Draft Recommendations

Sikand and Ralston provided an overview of the draft recommendations and changes made since the last meeting. Ralston invited discussion on outstanding recommendations for the rest of the meeting.

Recommendation 1.1 Streamline Eligibility to Reduce Participant Burdens and Advance Equitable Outcomes

- The CPUC has clear language that if a program comes across a customer in outreach that does not meet the eligibility criteria, they should not be excluded from participating in the program. However, in practice, many of these customers are excluded due to program requirements.
- This recommendation should be revised to include language to encourage programs to serve customers that are engaged through targeted outreach even if they don't meet all eligibility criteria as individuals. A phased approach could be

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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: Key Acronyms* for acronyms relevant to this meeting summary.

used to initially prioritize individual customers meeting criteria to avoid over-subscribing non-eligible customers.

- The Rising Sun's Green House Calls program targets HTR, underserved, and DAC customers and serves any resident that comes in through targeted outreach. This model is based on best practices from ACEEE and the [SB350 Barriers Study](#) to reduce barriers to participation.
- Rationale as to why a customer is or is not served by a program that has conducted targeted outreach to that customer can be valuable information to collect.

Recommendation 2.2. Capture and Value Equity Program Contributions Across the Portfolio.

Address Baseline Disparities Across Low-Income Eligible Programs

- There is a need to balance the importance of the data (e.g. collecting or measuring non-energy benefits) and the unintended consequences of requiring its reporting. For example, energy savings data requires data sophistication and financial resources to provide, which might be a barrier for CBOs or nonprofits to report and participate in program implementation. Reporting platforms include DEER and eTRM. On the other hand, generic data can lead to generic outcomes.
- A new equity workflow framework and data reporting process is needed to provide customer-facing benefits (not utility-facing benefits) that do not require excessive technical documentation to claim.
- Customer-facing benefits should be credited at an equal or higher level than utility-facing benefits.
- The definition of service and service to whom is important in this conversation. This defines what the outcome is and how we can measure it.
- Barriers can be unique to a customer or a region, so addressing these barriers might not be standardized.
- Inactive workpapers (e.g., DEER) create issues around incorrect data. There's no infrastructure to backtrack and credit things appropriately if a workpaper is no longer valid.
- To truly understand these customers, a study should be conducted to learn about what these customers actually need and create programs around those definitive needs, which would become very cost-effective. This study would need to be regional or PA-specific to capture hyperlocalized needs.
- DEER is anticipated to have an updated resolution up for a vote in late October 2026.

Properly Value Non-Energy Benefits (NEBs) and Intangible Impacts

- The NEB Quarterly Meeting will be held on the week of April 27, 2026.
- There are many kinds of NEBs, some might be utility-facing, and some might be customer-facing. What's needed is equity-focused NEBs that focus on the benefit for the customer. For example, workpapers are considered the basis for energy

bill impacts. However, if the outcome of a workpaper measures kWh on the benefit it provides to the utility—it doesn't encapsulate a customer benefit.
- NEBs are what the customer thinks about and is interested in.
- NEB Study Plan: [Market Rate Equity Segment Non-Energy Benefits Research Plan](#)

Recommendation 4.1. Expand Equity Value through Workforce, Education, and Training (WE&T) Integrations.

Leverage Project Aggregation Models as a Mechanism for Uplifting Job Quality

- Move support for BIPOC/minority small contractors into a different subsection of the recommendation.
- Project Aggregation is one tool in the toolbox. It is a mechanism that reduces the pool size of approved contractors for a kind of project in a given service area. By reducing the number of approved contractors, in theory, the contractors have more consistent opportunities for work.
- A concern with Project Aggregation is that local contractors closest to the project may be overlooked.
- Project Aggregation will be rescoped in the next draft.

Other Recommendations

Business eligibility under the Equity Segment

- The CPUC's definition of *underserved* for businesses is not clear. Energy Division welcomes ways to improve or simplify the definition.
- Clarification of this definition could loop back to Recommendation 1.1's discussion on targeting outreach and eligibility.

PA Policy Recommendations

- PAs are invited to share policy recommendations with the Facilitation Team.

Prevailing Wage Requirement

- A prevailing wage requirement currently exists only for taxpayer funded construction projects over a set dollar threshold. It would be great to explore how to apply this to ratepayer funded projects using the same system that is used for the taxpayer funded projects.
- This would eliminate the racial wage gap in earnings.
- Resource: [Prevailing Wage Study](#)
- This will become a sub-recommendation of Recommendation 4.

Community Designed EE Programs

- An equity market survey could be informative.
- CBOs and communities have been asked many times for their input already. Revisiting existing resources should be the first step. Resources include the [SB350 Barriers Study](#), [ESJ Action Plan](#), [BEEP Listening Sessions Report](#) (2022, 2026 - forthcoming), [DACAG Equity Framework](#)

Self-Install Incentives

- Keep in the garden plot, revisit if EAC continues beyond June.

Standard HTR Verification Process

- This is about not creating more barriers for participants and targeting outreach to meet the goals of the equity segment without narrowing and creating high standards of verification to show that they meet eligibility.
- Integrate this recommendation with the discussion on targeting outreach in Recommendation 1.1.

Fast Frequent Payment Batching for SMB Installers

- This idea relates to diversifying installer participation. Payment is just one piece of the idea.
- This might relate to designing programs with small, medium businesses in consideration of technology, insurance, and other barriers.
- Resource (forthcoming): a robust Contractor Supports Guide for engaging small, women- and BIPOC-owned contractors and supporting them to offer high-road employment to workers

Next Steps

Ralston reviewed the proposed EAC memo drafting plan. EAC Members will determine after the next draft if the EAC should meet again.

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).