



Knowledge is power: Lessons from the United States to strengthen community capacity for co- design and co-delivery of energy efficiency programs

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ABSTRACT

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Many key players in the energy efficiency industry have recognized the importance of partnering with existing priority audience community members in the design and deployment of energy efficiency programs. However, program administrators' best intentions on this front are often thwarted by the paucity of priority audience members trained and employed in the energy industry. A consortium of over 80 energy efficiency utilities in the U.S. and Canada includes several industry leaders working to build the skills, knowledge, and resources of communities, while strengthening existing leadership structures, so that communities can play a more central role in program design and co-delivery.

This paper highlights the culmination of this work, addressing efforts to build cultural competency within the existing workforce. Case studies from member program administrators across California and New England compile learnings on how to better support, train, and educate an energy efficiency workforce drawn from the communities intended for enhanced program engagement. In particular, this paper will characterize barriers and challenges in identifying new workforce candidates, training these individuals, and providing the necessary conditions for delivering decarbonization solutions. Data collection for this effort took place in 2025 and 2026 through interviews with utility staff. The findings highlighted in this paper are key to helping utilities learn from each other on how to build trust locally so that energy users are receptive to energy program offerings, and local campaigns can serve to build community knowledge of energy efficiency.

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Throughout the United States and Canada, combined spending on gas and electric Demand Side Management (DSM) programs exceeds \$9 billion USD annually,¹ a number that far out paces most other countries ([Consortium for Energy Efficiency, 2023](#); [Rotmann et al., 2025](#)). In the United States, energy efficiency programs are typically funded by ratepaying customers as a mandatory line item on electricity and gas bills. Ensuring equitable participation is important because while all energy users are paying into these programs, certain audiences are not receiving the benefits of the programming. Some of these priority audiences include income-eligible, small businesses, indigenous, rural, and multifamily renter customers ([Ashby et al., 2020](#)). This paper looks to answer the question: What strategies do energy efficiency program administrators leverage to identify, train, and support community-based workforce members to design and implement energy efficiency programs that build trust and demonstrate cultural competency?

The Consortium for Energy Efficiency (CEE) is a non-profit organization that convenes primarily utility efficiency program administrators from across the United States and Canada. Members leverage individual efforts by working together to accelerate energy efficient products, services, and program strategies. In 2022, CEE launched the CEE Center for Equity and Energy Behavior (“the Center”) to promote more equitable participation in and benefit from energy efficiency programs and more fully and accurately measure the equitable impact of programs for underserved customers. The Center aims to address the reality that income-eligible, low-English proficient, rural, Indigenous communities, and other priority audiences, may not participate in – and benefit from – energy efficiency to the same extent as their counterparts.

In 2025, 18 program administrator organizations participating in the Center developed definitions for workforce development and community capacity building that is used in this case study. Both definitions acknowledge that these are ongoing processes that necessitate continued reassessment. The definitions are as follows ([CEE, 2025](#)):

- **Workforce development** is supporting, training, and educating an energy efficiency workforce, drawing from the communities intended for increased program engagement. It includes:
 - Building cultural competency within the existing and future workforce
 - Addressing barriers to entry
 - Creating opportunities for advancement
- **Community capacity building** is building skills, knowledge, and resources in a community, while strengthening existing leadership structures so that communities can:
 - Play a primary role in program design
 - Actively participate in program co-delivery

CEE members observe that the first step to boosting engagement is characterizing audiences who are inequitably served, before identifying approaches that have worked well and opportunities to transfer learnings between different jurisdictions and audiences ([Sullivan et al., 2024](#)). This series of case studies highlights workforce development efforts from program administrators across the United States to showcase learnings and areas for growth when striving to build community capacity to support an equitable energy transition.

METHODOLOGY

The methodology of this work used a non-random sampling strategy and is exploratory in nature. Therefore, using semi-structured interview transcripts, it describes in detail three energy efficiency programs and the strategies they use to build trust, co-deliver and co-implement community-based programs that build capacity from within. This series of case studies contributes to literature specific program administrator experiences, insights, and perspectives to guide future community capacity building program development. To develop case studies, CEE staff reached out to Consortium member program managers to inquire about interest and

¹ 2020 was an outlier for U.S. and Canadian gas and electric DSM expenditures (\$8.6 billion) likely due to the COVID-19 pandemic. In the following years, data suggest an industry rebound above \$9 billion.

relevance to the case study process given their prior leadership in the field and experience co-developing and co-implementing workforce development programs.

The authors of this paper conducted semi-structured interviews modelled after Building Blocks of Behavior Change, which suggests the importance of including the Audience, Behavior, Content, Delivery, and Evaluation blocks to ensure all components are considered before implementation (Karlin et al., 2021). Previous literature has demonstrated that this framework is useful in exploring ex-post behavior changes and adequate inclusion of all blocks can increase credibility, confirmability, transferability, and reliability with other literature in this field (Rotmann et al., 2023). The 90-minute interviews were conducted with the program administrator staff across the United States, including individuals from the following organizations: Sacramento Municipal Utility District (SMUD), National Grid, and Avangrid. See Appendix A for the Interview Guide.

BUILDING BLOCKS OF BEHAVIOR CHANGE

Each of the case studies were evaluated using the “ABCDE” Building Blocks from the “Building Blocks of Behavior Change” developed by Karlin et al. (2021). See Table 1 for a summary of building block definitions mapped with case study findings.

Table 1 Case Study Summary Matrix of Building Blocks of Behavior Change.

BUILDING BLOCK FRAMEWORK	SMUD REGIONAL WORKFORCE DEVELOPMENT TEAM	MASS SAVE® COMMUNITY FIRST PARTNERSHIP PROGRAM	ENERGIZE CONNECTICUT SM COMMUNITY PARTNERSHIP INITIATIVE
Audience: Defining the audience for intervention will help gauge the barriers these individuals face and facilitate a tailored program design. Different audiences benefit from different methods of engagement.	Community-based organizations (CBOs) rooted in underrepresented neighborhoods serving marginalized populations.	Massachusetts municipalities and CBOs.	Environmental justice (EJ) communities as defined by the Connecticut Department of Energy and Environmental Protection (DEEP) map for the state.
Behavior: The specific behavior for the audience that the program aims to change.	Increase representation of underrepresented groups in the energy efficiency sector and adjacent trades through skill development and networking.	Adopt energy efficient and behaviors in a way that increases customer trust and program participation.	Increase participation in energy efficiency offerings.
Content: The message and message framing the program uses to spur behavior change.	SMUD funds and convenes partners, and coordinates relationships among CBOs who do the program design and delivery.	Fund an energy advocate, local marketing efforts, and resources like training on energy efficiency and electrification, expert support, co-branded multilingual marketing materials, coaching and best practices to encourage program participation.	Partner with local CBOs to deliver outreach plans that promote energy assessments, weatherization, and other energy-saving upgrades.
Delivery: How the program delivers this content to the audience, including messengers and partners, mediums for communication, as well as timing of program implementation.	CBOs in underrepresented communities deliver trainings including curriculum development, certification facilitation, recruitment, access to wraparound services, placement and tracking.	Supported by a vendor, Mass Save program administrators are the primary implementer, communicating directly with partners and energy advocates and developing and delivering resources that promote energy efficient solutions.	Email, social networks, word of mouth, and various print and digital media, and provide partners freedom to deliver outreach efforts in the best way for their specific communities.
Evaluation: The documentation and measurement of program progress and impact to inform further program improvement.	While this is a portfolio of efforts and not a specific program, there are not program level evaluations. Core metrics of success include number of people trained and whether they are placed in living wage, zero-carbon careers.	The focus of evaluation is on participation metrics and successful community events, but the specific KPIs are still being finalized.	Provide tailored goals to partnerships on reaching a target number of leads or completed assessments, regularly receive feedback from partners, generate multiple reports to track progress.

SACRAMENTO MUNICIPAL UTILITY DISTRICT (SMUD) REGIONAL WORKFORCE DEVELOPMENT TEAM

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SUMMARY

SMUD has a team dedicated to regional workforce development to ensure there is a skilled and accessible workforce pipeline in the community that can advance SMUD's energy efficiency efforts. The team manages community partnerships with over 50 organizations each year, and is constantly looking for new relationships, maintaining and supporting existing partners, and connecting individuals with employers to build community capacity from within.

BACKGROUND

SMUD is the sixth-largest community-owned electric utility in the U.S., providing over 1.5 million customers in Sacramento, California with electricity. Governed by a locally elected Board of Directors, SMUD operates as a not-for-profit utility, reinvesting resources to benefit the community rather than shareholders. Meeting SMUD's zero carbon goals by 2030 will require electrification of buildings, homes, and vehicles, facilitated by a community-based workforce that supports local contractors. It is best practice to co-design and co-implement programs, and SMUD has operationalized these concepts by supporting CBOs in leading workforce development training programs.

AUDIENCE: WHO IS THIS EFFORT TRYING TO REACH?

The SMUD workforce development team has a broad focus of better engaging with communities who are underrepresented in the energy efficiency industry and adjacent trades. The purpose of workforce development efforts at SMUD is to bridge a disconnect between employees and employers in the local industry who experience frustration when looking for work and individuals to fill openings. SMUD addressed this gap by facilitating trainings and placement through community partnerships.

Training partnership opportunities are open to any non-profit organization, educational institution, and customer in the service territory; however, SMUD makes an intentional effort to partner with CBOs in areas with gaps in knowledge and expertise. The main objective is to provide training to communities who either do not have access to or may not be aware of careers or trainings in the energy industry. To do this, SMUD has developed a resource priorities map that overlays the service territory with other data points such as environmental justice community census tracts or areas with limited food or digital access to help identify neighborhoods in the most need. This helps SMUD prioritize "highly sensitive" areas for direct engagement efforts. While any partner who is deeply rooted in the community is considered, SMUD intentionally engages with groups serving communities who have participation and representation gaps such as ethnic-based organizations, anti-recidivism groups, or organizations with high levels of female or veteran-specific participation.

SMUD is unique in that they play an active role in identifying and recruiting partners for participation in these workforce development programs, rather than relying on an application process to distribute regional workforce development funds. To ensure a fair process, SMUD participates in ongoing outreach to new organizations to garner a diverse pool of potential partners and ideas and avoid overreliance on the same organizations yearly. Additionally, a separate, application-based, Shine Award Program can serve as an entry point to identify potential partnerships. Through this program, organizations receive funding for one year that often expands into longer term collaborations, including participation in SMUD's workforce development partnership for up to three years.

BEHAVIORS: WHAT DO WE WANT THEM TO DO?

The primary behavior SMUD aims to change is to increase the number of members in skilled trades and clean-energy careers through participation in workforce development trainings, particularly from underrepresented and under resourced communities. A shift in behavior change would result in residents – particularly women, minorities, and members of other underrepresented groups – pursuing training and employment in energy industry careers like electrification, construction, line work, and clean-energy technology. To support this behavior

change, SMUD partners directly with CBOs to co-design and co-deliver workforce trainings in ways that consider trust, barriers to entry, and cultural competency.

To support these workforce members in pursuing training and employment, this program strategy aims to decrease barriers to entry so that people who would not have typically applied have increased access and opportunity to receive training. One of the ways SMUD supports this is by offering wraparound services to participants including transportation, childcare, language services, access to technology, tools, and equipment, and stipend funding. By decreasing these barriers to participation, SMUD hopes that individuals will successfully complete trainings and attain and retain careers that can support economic growth and prosperity.

Following trainings, SMUD also advances these objectives by encouraging employers to hire entry level positions and to support equitable hiring. For example, SMUD works closely with contractors and employers to take a chance on newly trained individuals by subsidizing wages. Through a Subsidized Wage Program, when businesses hire graduates of SMUD's workforce development programs to participate in on-the-job training, SMUD will cover 50 percent of the wages for the graduate for the first three months as a "proof of concept". This approach demonstrates SMUD's strong belief in both the training and the candidates that complete the training. This method also supports candidates and decreases barriers for businesses and contractors to take a chance on new, entry level employees.

CONTENT: WHAT ARE WE SAYING TO THEM?

To identify gaps in the workforce, SMUD convenes sector-based advisory committees to collect data including number of open job postings, length of time the posting remains vacant, and skills applicants lack. This helps SMUD understand what employers are missing, to allow them to bring these findings to community partners and adjust training topics to fill the real-time gaps in the local community.

There are five different categories of workforce development training that SMUD's partners offer: career technical training, workplace success and skills training, entrepreneurship programs, upskilling programs, and career awareness and education programs. Content wise, the programs deployed by community partners have a wide range of skills, from resume writing and interview practice, to more involved offerings and technical trainings that include wraparound services with transportation, childcare subsidies, grants for tools and work boots or technology.

DELIVERY: HOW WILL WE TELL THEM?

SMUD recognizes that especially since they are not implementing the training, it is very important to ensure the organizations who are doing the implementation are practicing cultural sensitivity. For instance, SMUD staff cannot assume they will know which are the most influential organizations in the region. In the past, collaborating with cultural chambers of commerce to ask for help identifying organizations for partnerships has helped ensure the portfolio of partners mirrors the diverse base of customers the utility serves.

What differentiates SMUD as a community capacity building program as opposed to a workforce development program is their co-design and co-delivery. The primary delivery mechanisms and communication channels differ between programs, but SMUD's offerings are unique because the messenger is primarily the CBOs. The primary channel includes strong word of mouth communication, but SMUD also leverages community meetings, neighborhood announcement boards, flyers, newsletters, community papers.

CBOs are allowed some flexibility to deliver programs on their own timeline, which allows them to tailor the programming to specific community needs. Organizations are asked to develop a delivery plan prior to receiving funding, but the plan is expected to evolve over the length of the partnership. This reflects SMUD's trust in partners to serve the communities most effectively.

EVALUATION: HOW DO WE ASSESS IF IT IS WORKING?

SMUD tracks engagement with community partners including number of partnerships each year, total funding, and number of people trained and placed in the industry. The primary goal

that SMUD sets is to reach at least 4,000 people per year with training and then place at least 400 of these trainees in a zero-carbon related career with a competitive wage. In 2024, SMUD exceeded this goal, facilitating placement of nearly 900 people who participated in community-run training programs.

Because these training programs are run directly by the CBOs, SMUD has minimal control over the evaluation. Some metrics CBOs report include number of trainees, number of individuals placed into zero-carbon careers; SMUD also calculates cost per trainee and cost per career placement. SMUD has found that emphasizing the business case for supporting local business with a skilled workforce has been more compelling to management than solely community impact narratives, even though SMUD is a community-owned utility. For example, speaking to benefits like reducing business and contractor costs by directly connecting with a pool of qualified candidates to reduce the number of days needed to fill a position can be helpful. Currently, SMUD's workforce development programs are not expected to contribute directly to energy savings; rather, the benefit of these efforts is that employers filling thriving-wage jobs strengthens the local economy and builds lasting community partnerships.

In 2025, SMUD began a longitudinal tracking process to build out outcome data and evidence. This evaluation assesses graduates' progress at 6 months, 12 months, and 18 months following program completion, asking questions about job attainment, industry relevance, and retention. Some indicators for employers include changes in time-to-hire, applicant volume, and level of skill preparedness.

MASS SAVE® COMMUNITY FIRST PARTNERSHIP PROGRAM

SUMMARY

The Mass Save® Community First Partnership (CFP) Program is a community trust building program developed in 2022 to increase energy efficiency program participation and build community capacity. The program partners with 58 municipalities and CBOs across the state of Massachusetts to build trust and support energy efficiency campaigns.

BACKGROUND

The Community First Partnership (CFP) Program was designed by the Massachusetts Program Administrators (PAs) under the 2025–2027 Mass Save Plan to support decarbonization, equity, customer experience, supplier diversity, and workforce development. Natural gas utilities and energy efficiency providers in Massachusetts come together under the Mass Save® name with the goal of empowering customers to make energy efficient upgrades through rebates, incentives, services, training and more ([Sullivan et al. 2024](#); [Mass Save, 2026](#)). Mass Save sponsors include Berkshire Gas, Cape Light Compact, Eversource, Liberty, National Grid, and Unitil; sponsors collectively deliver nearly \$1 billion annually in incentives to electric and natural gas customers throughout the state ([Mass Save, 2024](#)).

The CFP Program offers grant funding of up to \$85,500 annually for a three-year planned term. This funding goes towards hiring local energy advocates and running community-based social marketing campaigns. The funding model grants half of the funding up front to allow for initial cash flow to hire the community-based position. In exchange for funding, Mass Save asks partners to leverage their position as a trusted local messenger to sign up residents for Mass Save services and help them navigate next steps. Energy efficiency services include home and small business energy assessments, weatherization, and heat pump installations.

AUDIENCE: WHO IS THE PROGRAM TRYING TO REACH?

Mass Save identified several priority populations who have historically participated less. These include, renters, residents that transact in languages other than English, moderate income customers, and residents who live in environmental justice census blocks. Lower participation is most commonly due to some residents' lack of trust of their utility. By partnering with municipalities and CBOs across the state, this program was developed to build trust across the Mass Save brand, thereby increasing program participation.

Equity is a central pillar of the current Mass Save three-year strategic plan with a renewed focus on equitable emissions reduction. Massachusetts also has a robust and progressive regulatory

framework that prioritizes equitable participation. The Massachusetts Department of Public Utilities (DPU) has identified a list of 22 “designated equity communities” (DECs) based on lower participation rates that Mass Save prioritizes in outreach efforts. The process of finding participating municipalities and organizations between the first cycle of CFP and the second was more streamlined because there were many partners who renewed their partnership so fewer hours were needed to get new partners on board. All 22 DECs are participating in the CFP for the 2025–2027 cycle.

Approximately 85% of partners are the municipality itself. When possible, Mass Save PAs tries to partner directly with the municipality. Because residents often trust municipal leaders like mayors and town managers, co-branded municipal partnerships can boost campaign success. In scenarios where municipalities are not the primary partner and leader, CBOs can participate if they receive a letter of recommendation from the municipality.

BEHAVIORS: WHAT DO WE WANT THEM TO DO?

The primary objective of this program is to increase participation in Mass Save energy efficiency programs by improving brand trust among priority communities. CFP relies heavily on community-based social marketing principles, which acknowledges that the messenger is equally as important as the message they are trying to convey. Local advocates with established community ties can leverage lived experiences and build trust more effectively to recruit participants. In practice, this program aims to change the behavior of increasing participation in energy efficient activities.

CONTENT: WHAT ARE WE SAYING TO THEM?

Partner communities receive extensive support including robust training, tabling supplies, marketing materials, access to design services, mailing lists, reporting templates and more. Communities use these materials as starting points and are encouraged to develop outreach campaigns that will resonate with residents in their local communities. In 2022–2024, partners logged over 5,000 outreach engagements around Massachusetts and sent 40 co-branded outreach letters, resulting in over 45,000 sign-ups.

Community partners are responsible for finding and hiring the energy advocate. Mass Save PAs provide a standard job description template and municipalities tailor it to the needs and desired competencies in their communities. PAs do not set specific goals or track metrics around who the energy advocates are and do not collect demographic information about advocates since they are not Mass Save employees. PAs do set wage minimums and encourage partners to offer full benefits where possible.

In exchange for funding, partners receive customized sign-up goals for home energy assessment, weatherization, heat pump, and/or small business energy assessments. There is no current competition component between the communities participating in this program. Mass Save PAs have found that communities are typically motivated to get this work done and the program does not need the competitive edge or gamification. PAs also note that the dynamic of pitting communities against each other is not effective and it can be challenging to compare efforts between distinct communities.

While not its primary objective, CFP has been a good steppingstone for individuals to join the energy efficiency workforce. Energy advocates often leverage the training and experience earned in the program to secure higher paying roles in the energy industry. Because this was not initially developed as a workforce development program, there are not specific equity metrics that are measurable or data that tracks what roles former energy advocates have gone into after participation in the program. Mass Save does not have any current plans to track the pathways of former participants but is open to developing a survey to do this.

DELIVERY: HOW WILL WE TELL THEM?

The CFP program is implemented by Mass Save PAs using a lead vendor model. The lead vendor is responsible for assigning program managers to each CFP partner, designing marketing materials, leading trainings, and conducting extensive reporting.

CFP partners are admitted to the program for a three-year cycle. The first cycle of this program ran from 2022–2024 and the program is currently in the second cycle running from 2025–2027. Fifty-eight communities and CBOs participate in the current 2025–2027 cycle. There is a maximum amount of annual funding of up to \$85,500. Communities receive half of their eligible award at the beginning of the year and can receive more funding in Q2 and Q3 if they make progress towards their assigned goals. This format supports evaluation of community performance since CFP partners must achieve key performance indicators (KPIs) to unlock additional funding.

While it is uncommon for communities to miss their KPIs, in the last program cycle, two communities dropped out of the program due to staffing challenges. A key learning from the first roll out of this program was that most communities need a full-time energy advocate. There is plenty of work for the advocate to participate in, and in most communities, it was difficult to find an individual who was open to part-time work for more than six months. From this learning, Mass Save has since increased the maximum annual award from \$60,000 to \$85,500 to accommodate a full-time salary. In the first phase of this program, communities found that \$60,000 was sometimes insufficient for the needs of the work in the community.

EVALUATION: HOW DO WE ASSESS IF IT IS WORKING?

Because this program was developed as a method to drive program participation, there are few workforce development metrics. Mass Save PAs could see value in collecting more data from energy advocates to evaluate how the CFP program supported their energy industry career. This feedback and anecdotal evidence could help highlight program value to both regulators and future applicants.

Historically, this program tracks KPIs related to participation data, not workforce development data. Four main KPIs are used to measure success:

1. Energy assessment enrollment among priority populations
2. Home weatherization projects completed among priority populations
3. Heat pump installations completed among priority populations
4. Small business assessments among priority populations

In addition to the KPIs listed above, Mass Save also tracks partner activity metrics such as community events logged, meetings attended, and number of distinct marketing campaigns launched. Still, those involved acknowledge that the goals and metrics for the program still need refining and shared that there continues to be extensive and ongoing program design changes to improve participant experience and program success.

ENERGIZE CONNECTICUTSM COMMUNITY PARTNERSHIP INITIATIVE

SUMMARY

The Community Partnership Initiative (CPI) was established in 2021 to provide grants and promote energy efficiency programs in local communities. Participants include CBOs, nonprofits, municipalities, and chambers of commerce ([Energize Connecticut, 2025](#)). Partners can apply for a short- or long-term partnership. The short-term partnership is between 3–6 months compared to the longer 6–12-month partnership that most participants select. All funding must be approved by the Energy Efficiency Board, a group of appointed advisors who evaluate and advise Connecticut's utility companies' energy conservation plans to help the State meet its energy needs, and the Department of Energy and Environmental Protection (DEEP) before a partner receives a memorandum of agreement.

BACKGROUND

Avangrid, Inc. includes eight electric and natural gas utilities that serve customers across New York, Maine, Massachusetts, and Connecticut ([Sullivan et al., 2024](#)). Avangrid, Eversource, the Energy Efficiency Fund, Connecticut Green Bank, and the State of Connecticut sponsor the Energize ConnecticutSM (“Energize CT”) initiative.

Energize CT sponsors serve over 2 million residential and commercial electric and natural gas customers across Connecticut annually, and its sponsors have united under a shared mission “to provide Connecticut residents and businesses the resources they need to save money and use clean energy” ([Energize Connecticut, n.d., Sullivan et al., 2024](#)). Energize CT has developed state goals to reach every energy customer in the state of Connecticut by 2030. To do so, Energize CT has focused on engaging income-eligible customers. The income-eligible population is a large customer base with traditionally low energy efficiency program participation rates, and when engaging multifamily buildings, there is potential to reach both market rate and income-eligible customers alike.

AUDIENCE: WHO IS THE PROGRAM TRYING TO REACH?

CPI was established in 2021 to enable partnerships with CBOs, non-profits, municipalities, chambers of commerce, and other partners who aim to raise awareness of and participation in energy efficiency programs across EJ communities. Communities eligible for participation include those who are distressed,² are in a grace period (previously distressed but no longer), or census block EJ groups.

While municipalities are encouraged to apply, they must partner with a community-based organization to ultimately be granted funds. These partnerships help share responsibilities for campaign activities and significantly expand community reach. On average, a single community partner can engage with approximately 17 distinct communities. While organizations applying for funding are not required to have any prior knowledge of energy efficiency or the utility industry, it is recommended that partners have roots in the community. Organizations interested in applying who are less developed within the community are encouraged to partner with organizations with more community experience and jointly apply.

Avangrid found success in prioritizing engagement with chambers of commerce and government councils due to their strong community ties, active memberships, and ability to support small business outreach. Chambers have been especially valuable in identifying potential CBO partners, aided by their regular meetings and ongoing community involvement. Community events and networking opportunities have also proven effective for connecting with prospective applicants. To ensure their participants are trusted local actors and will be effective in achieving this goal, Avangrid conducts research on potential organizational partners before committing. Applicants may send letters of support with their application (e.g., if they have received another grant recently, or from a board member).

BEHAVIORS: WHAT DO WE WANT THEM TO DO?

Avangrid looks to community partners to serve as trusted, local ambassadors for Energize CT’s energy efficiency programs. The primary objective is to raise awareness and deepen understanding of key offerings – such as Home Energy Solutions-Income Eligible, heat pump adoption incentives for income-eligible customers, the Small Business Energy Advantage program, and the Multifamily Initiative. To meet this goal, community partners are expected to:

1. **Conduct Local Outreach and Education.** Partners help energy customers understand program opportunities, including details on eligibility, benefits, and how to get started. These existing relationships within communities uniquely position partners to reach audiences that may not otherwise engage.
2. **Identify and Engage Hard-to-Reach Populations.** A core goal is increasing participation among historically underserved or energy-burdened communities. Partners help close this gap by connecting with multilingual populations, low- and moderate-income households, small businesses, and renters who may not be aware of or feel comfortable accessing energy programs on their own.
3. **Host or Participate in Community Events.** Partners participate in local events to bring Energize CT information directly into community spaces. These venues allow for real-time conversations, Q&A, and referrals to the appropriate programs.

² According to [C.G.S. Section 32-9p](#), a distressed municipality should be based on “high unemployment and poverty, aging housing stock and low or declining rates of growth in job creation, population, and per capita income.”

4. **Share Campaign Materials and Promote Programs.** Partners distribute flyers, posters, social media content, and other campaign materials developed for the initiative. Their ability to use trusted communication channels – such as neighborhood associations, cultural organizations, and small business networks – significantly amplifies reach.
5. **Support Residents and Businesses Through the Enrollment Process.** Community partners provide light-touch support in helping households and small businesses understand how to take the next step. This may include directing them to program websites, helping them complete program applications, or connecting them with authorized contractors. While partners are not expected to deliver technical services, they play an essential role in connecting community members to the right resources.
6. **Provide Feedback to Strengthen Program Delivery.** Partners offer valuable insights on what resonates locally and what barriers community members encounter. This community-informed perspective is central to increasing participation and ensuring equitable impact.
7. **Track and Share Outreach Activities.** Partners document their outreach efforts—such as the number of events attended, materials distributed, and residents or businesses reached. This helps measure impact and supports continuous improvement of the initiative.

CONTENT: WHAT ARE WE SAYING TO THEM?

CPI leverages the local knowledge, trusted relationships, and community experience of organizations in areas of focus to raise awareness of and participation in energy efficiency offerings from Energize CT. Avangrid staff shared that oftentimes people have to hear something five to six times before they act on it, so these partnerships are crucial to help customers gain interest. When designing efforts to reach communities with these offerings, Avangrid gives partners a fair amount of freedom, providing templates for campaign and marketing activities and expertise upon request. This partnership is also not intended to replace other marketing efforts, but rather to enhance them and reach further than the existing marketing efforts have.

While the average grant is between \$40,000 and \$50,000 USD, grants range between \$10,000 to \$80,000 to implement community outreach plans that promote energy assessments, weatherization, and other energy-savings upgrades ([Energize Connecticut, 2025](#)). A large portion of this funding is allocated towards partner's staff time, but Avangrid ensures that this does not take away funding from the efforts mentioned above by requiring partners to submit outreach and budget plans, as well as monthly staff hours. Some CPI partners are organizations run by community volunteers who are not compensated for their time or efforts.

DELIVERY: HOW WILL WE TELL THEM?

Avangrid announces application content through local media and leverages their own networks. During the application process, Avangrid hosts monthly webinars to provide a high-level overview of the partnership, go through the application process, and answer questions. Outreach is primarily conducted via email, common connections, and media.

Since the program's inception, invoicing has shifted, as it was previously pay by performance. In round two, partners received all funding upfront. Currently, in round three, Avangrid provided one-third of funding upfront and a checklist of items partners needed to complete. These items include signing and submitting a memorandum of agreement, invoicing for their first third of funding, viewing orientation recordings for the programs of focus, partnering with authorized contractors, setting up a system with contractors to track leads, posting a press release to announce their funding award, creating a landing page for their campaign, creating two forms of collateral that follow Energize CT branding requirements, and completing a yearly work plan to outline their anticipated efforts. Once these items are completed, partners can then invoice for the final two thirds of funding.

Communication regarding marketing materials is conducted via email, but partners are encouraged to coordinate in-person meetings with the Avangrid program manager on a bi-weekly basis. To increase transparency, Avangrid publishes regular newsletters detailing partner

work and Avangrid efforts to support partners. To maintain constant support to partners, Avangrid periodically sends reminders that include helpful tips and tricks like marketing advice or requirements of Energize CT branding.

Avangrid addresses language barriers by earmarking funding for generating marketing materials in different languages, working with contractors that can speak in the desired language for the customer, and having team members that are able to speak the language at program events. Specifically, Energize CT found the benefit to providing dual language collateral for households where someone in family speaks English, but other family members do not; they provide one resource that these households can use and flip back and forth between more easily. To remove additional barriers, contractors serving income-eligible customers will see them through with additional add-on measures. For example, when exploring weatherization services, contractors will also explore heat pumps with the customers. This allows the same contractors to work with customers for the entire process from proposal to install. Avangrid found that having partners connect with an Energize CT authorized contractor helps see the project through to the end and increases customer retention.

EVALUATION: HOW DO WE ASSESS IF IT IS WORKING?

Avangrid provides all applicants with a goal based on past participation for the community of focus. Initially, Avangrid set goals by increasing average participation over the previous five years by 10%. In practice, reaching this goal was challenging so for round three, Avangrid is using a three-year average with a 10% increase. These goals have been set to encourage partners to reach more customers, but there is no penalty for not reaching these targets.

Avangrid helps tailor engagement goals based on the program the campaign focuses on. To measure customer engagement, contractors are responsible for finding and tracking a set number of “leads” or completed assessments. In previous rounds of funding, staff found that time was a common barrier for customers. For instance, Avangrid might have a customer who gets into their system as a lead and has an appointment scheduled, but it takes months or after the campaign ends, before their assessment is completed. In response, both metrics now count towards the goal.

To track leads and completed assessments, Avangrid has created tracking systems where all customer information is embedded. Contractors can pull reports embedded in the tracking system and filter them for the communities that are part of their partnership. Avangrid staff look at these monthly and let partners know where they stand towards reaching their goals. Staff are in the process of making progress toward the goals public so the community can also view this data through the Energize CT Municipal Dashboard.

CONCLUSIONS AND KEY TAKEAWAYS

Below is a synthesis of successful practices and learnings that have emerged allowing for effective engagement of communities to help build capacity from within via workforce development efforts and programming. These learnings can serve as the foundation of future community capacity building programs. Future work would consider a larger breadth of programs and conduct a more detailed evaluation comparing program effectiveness across jurisdictions.

Using the Building Blocks of Behavior Change method that has been co-developed with partners across the United States, Canada, New Zealand and used in European contexts allows this work to be generalized across country contexts. However, additional methodological limitations include the non-random sampling and limited sample size which may reflect systematic errors in the form of researcher and volunteer bias.

AUDIENCE

- **Engage with the chambers of commerce** to reach many organizations at once and ensure cultural sensitivity. Cultural chambers can help identify organizations for partnership and ensure the portfolio of partners mirrors the diverse base of customers the utility serves. Chambers typically have close ties to community, active members,

and can better support small business opportunities. Chambers of commerce have been particularly helpful when identifying CBOs due to their active community participation and regular meetings.

- **Prioritize full-time employment positions**, as these are typically more desirable and feasible for community members looking to enter the industry. Part-time work opportunities often lead to higher turnover so ensuring that funding is available for full-time opportunities will benefit individuals and community members.

BEHAVIORS

- **Invest in the messenger as well as the message they are delivering.** Co-delivery of programs leverages existing trusted community relationships. Co-design will build trust, address barriers to entry, and utilize cultural competency. A community-based messenger can better reach those who would not have typically applied than an outsider.
- **Explore community capacity building characteristics of programs not originally intended for workforce development.** Providing experience in the energy industry can serve as a steppingstone and build community capacity even if it is not the main focus of a program.

CONTENT

- **Give partners latitude with program design to ensure cultural sensitivity and community buy-in.** Program administrators do this by providing community partners with templates and technical support, but largely by stepping back and allowing partners to tailor programming to specific community needs on their own timeline. An added benefit is that these communities are better able to practice cultural sensitivity as they are typically embedded directly in the communities they are aiming to serve.
- **Offer wraparound services to minimize barriers to participation.** These services may include funding for transportation, childcare, or work equipment. It can be challenging to include these items in a budget, but program administrators have found success in creating a large, general, line item and allowing community partners to provide wraparound services at their discretion. Offering these additional services that go beyond traditional trainings help individuals feel more compelled to participate in trainings that can support future career development and discovery.
- **Provide on-the-job training opportunities** and support trainees and recent graduates by advocating for them in entry level positions. One way to do this is by subsidizing wages as a “proof of concept”. This method also provides support for candidates and aims to decrease barriers for businesses and contractors to take a chance on new, entry level employees and supports more equitable hiring practices.

DELIVERY

- **Increase transparency by being accessible to community partners** and the community. For example, some program administrators publish regular newsletters that detail partner work and share work that the PA is doing to support the community.
- **Provide funding incrementally.** When dealing with a large sum of money to be spent on an annual basis, program administrators found great success when giving a portion at the beginning of the funding period to cover initial costs. Then, throughout the year, awardees can incrementally request more as they meet goals, complete checklists, or prove progress towards KPIs.
- **Leverage a multitude of media outlets**, especially ones that are meaningful to the community, to promote programming. Providing an opportunity for potential grantees to ask questions during the application process has helped reduce barriers to participation.

- **Help community partners set goals.** This is an effective tool to encourage progress towards longer term objectives. It can be helpful to constantly evaluate metrics to ensure barriers like time do not diminish the magnitude of efforts and progress towards goals. For example, instead of tracking completed assessments, measure leads to show community engagement with program and intent to participate.
- **Strive for continuous improvement.** Regularly collecting feedback from community partners and customers who are engaged in programming has led to increased community buy-in and more successful programming. Co-design and co-delivery give program administrators less control over evaluation of each program, making it challenging to collect customer data or feedback.

These exploratory case studies detail the strategies of three energy efficiency programs towards building trust, co-delivering and co-implementing community-based programs that build capacity from within. While these three case studies offered different approaches to program design and delivery, key themes stood out. Leveraging trusted messengers to boost participation in underserved communities, providing partners ongoing support and utilizing wraparound services to decrease participation barriers, allowing partners the freedom to tailor outreach plans and goals to their specific local contexts, and creating consistent feedback mechanisms are all essential elements to building capacity in communities. Doing so is essential to minimizing barriers to participation in energy efficiency programming to ensure *all* audiences can benefit.

APPENDIX A: ABRIDGED CASE STUDY INTERVIEW SAMPLE GUIDE

AUDIENCE

1. **Who is the intended audience for this intervention?**
 - a. Why did you focus on these specific audience(s)?
 - b. How was your intended audience identified, defined, and characterized?
 - c. What data sources did you use?

PLANNING AND DESIGN

2. **What were the main objectives or goals?**
 - a. Did you establish objectives and goals for the program from the outset?
 - b. How did you evaluate or measure these? What metrics did you use?
 - c. Did you establish what a successful outcome to meet your intended audiences' needs would be?
3. **How did you assess the need for workforce development or community capacity building?**
4. **What strategies (if any) does this program include to bolster cultural competency?**
5. **Did you identify and bring together stakeholders in program design?**
 - a. What was the process?
 - b. Who were the stakeholders and how did you bring them together?
 - c. How did you determine what capacities within the community would benefit from additional support?
 - d. Did you set any goals for relationship-building, and how did you build and maintain relationships with stakeholders?

DELIVERY

6. **What did program content and delivery entail?**
 - a. What mediums were used?
 - b. How did you determine the messaging/strategy?

- c. How was the content tailored to the intended audience?
- d. How did you determine whether your intervention would be culturally appropriate for your target audiences?
- 7. What program components were included specifically to help remove logistical barriers and encourage participation?**
- 8. What was the program duration and timing?**
- 9. Who delivered the program and how were they compensated?**

EVALUATION AND METRICS

- 10. Has this program been evaluated?**
 - a. What metrics were used to evaluate and what was the basis for these metrics?
 - b. Did you use specific metrics to track progress towards equity objectives?
 - c. Was there an assessment of equity impacts?
 - d. How were baselines and targets set for measuring progress?
 - e. What challenges or barriers came up when evaluating?
 - f. Based on lessons learned, what changes were made to the pilot or intervention as a result?
 - g. Was evaluation conducted in house or did it require new staff/consultants to be hired? What budget was the funding from?

DISCUSSION

- 11. Did you fully achieve program goals?**
- 12. Were there any unintended consequences from this intervention, particularly around issues of equity, justice, access or affordability?**
- 13. What recommendations would you give other program managers designing similar interventions?**

ADDITIONAL FILE

The additional file for this article can be found as follows:

- **PowerPoint Slides.** PowerPoint Slides. DOI: <https://doi.org/10.66506/essp.5-088-26.s1>

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Author 1: Writing – original draft (lead); Investigation (lead); Data Curation (lead); Writing – review and editing.

Author 2: Writing – review and editing; Investigation (support).

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