

ILLUME

Memorandum

PREPARED FOR: Connecticut Energy Efficiency Board (CT EEB) Leadership Committee

PREPARED BY: Diversity, Equity, and Inclusion (DEI) Consultant Team, ILLUME Advising

SUBJECT: Workplan for 2022

DATE: July 20, 2022

Background and Introduction

The ILLUME DEI Consultant Team was introduced to the EEB at its board meeting on June 8, 2022, and subsequently began its onboarding to the consultant role. In the sections below we present a workplan for the remainder of 2022, as well as considerations for the 2023 workplan. Throughout our work, we plan to maintain regular interaction and collaboration with the EEB and the EEB's technical consultants through board meetings, committee meetings, and other avenues as necessary.

2022 Workplan

For the remainder of this year, our priority is to focus on “Task 2: Consult on Development of New Equity Metrics”, as identified in our scope of work. As noted in our RFP response, developing metrics takes a thoughtful and longer-term focused approach. We understand that we must also be cognizant of the work that has been completed to-date and take this into consideration as we lay out our tasks.

Additionally, in late 2022 we will also explore with the Technical Consultants, Companies, and EEB how we can support the other key areas of work as identified in our scope: Community Outreach Strategies and Supplier and Workforce Diversity.

Workplan Priorities

Since submittal of our RFP response, the Companies put forward a final 2022-2024 Conservation and Load Management Plan on March 1st of this year. This plan contains performance management incentive metrics, including equity metrics, that sought to address actions and recommendations from the Department of Energy and Environmental Protection's (DEEP) Equitable Energy Efficiency (E3) proceeding. At this time, the Companies are also developing updates and budgets for the 2023 plan, which must be filed by November 1, 2022.

Given the regulatory timetable for the 2023 plan and already moving processes across multiple stakeholders, we do not plan to recommend new equity metrics this year. Rather, we intend to accomplish the following priorities:

- (1) Develop a deep understanding of energy efficiency programs, including how equity is currently being considered and measured within programs
- (2) Identify the potential gaps for understanding and measuring equity within programs

(3) Chart out a framework from which to develop future equity metrics

We will perform the tasks outlined in the following sections to accomplish the priorities noted above. This will create the foundation necessary to work with Connecticut stakeholders and develop meaningful equity metrics.

Stakeholder Interviews

We will interview key stakeholders who work across the different facets of energy efficiency programs in Connecticut. These interviews will largely take place over the summer of 2022 and will explore questions to build a foundation for developing meaningful equity metrics. Questions may include (but are not limited to) the following:

- What are the biggest barriers to increasing program enrollment from residents and businesses in distressed communities?
- How does the goal of equity in programs interact, complement, or conflict with other program goals and directives?
- Where and how do equity objectives fit into current programs?
- How should we measure equity? What are current metrics, and why were they chosen? What data sources are used and why?
- What else is important that we need to be aware of when considering equity or equity metrics?

We have identified the following stakeholders for interviews:

Lead Technical Consultant , Stacy Sherwood (complete)	Residential Technical Consultant , George Lawrence (complete)	C&I Technical Consultant , Richard Fasey (complete)
Evaluation Administrator , Lisa Skumatz (complete)	United Illuminating , Joel Kopylec	Avangrid , Hammad Chaudhry
Eversource (Electric and Gas) , Ron Araujo and Steve Bruno	DEEP , Kate Donatelli	Select EEB Board Members

Materials Review and Gap Analysis

We will perform a review of background materials while stakeholder interviews are taking place. These materials may include previously filed Company plans, documentation from relevant DEEP proceedings (such as E3), current metrics information and documentation provided by the Technical Consultants or Companies, relevant evaluation or research reports, and other materials as provided or requested during our interviews.

During our review we will identify how equity is considered within programs, how it is measured, and what information is available to inform equity metrics. Along with the information we collect during our stakeholder interviews, this will help us to identify where there may be potential gaps in how equity is framed and measured. As gaps are identified, we will document them as potential areas to consider for equity metrics development.

Our gap analysis findings will be presented in meetings with the Technical Consultants, Companies, and the EEB in late Q3 of this year.

Preliminary Equity Metrics Framework

As noted in our RFP response, metrics need to be meaningful, specific, address policy goals, and be sufficient to ensure their usefulness in informing equitable program performance. To achieve these outputs, it is important to construct a framework that can inform diverse stakeholders on data points across multiple programs.

This preliminary equity metrics framework will be presented and discussed to receive feedback in meetings with the Technical Consultants, Companies, and the EEB in Q4 of this year. As we conclude our stakeholder interviews, materials review, and gap analysis in the fall we will begin to flesh out our equity framework to develop equity metrics to be completed by mid Q1 2023.

2023 Workplan Considerations

Building upon the work begun in 2022, we will work with Connecticut EEB stakeholders to finalize recommended equity metrics, based on our gap analysis and the equity metrics framework. We will also begin assessing EE education and workforce development opportunities as part of the consideration and integration of E3 objectives into EEB goals and priorities. We will present an updated workplan in Q1 with more details on these DEI E3 elements as our assessment findings reveal opportunities in these areas.

In Q1 of 2023, we will also solidify our working relationship with the EEB and technical team to ensure regular reporting and work coordination as we deepen our engagement with the EEB members, technical team, DEEP, and the Companies.