

Taking a Data Driven Approach to Equitable Program Design

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Agenda

- 1 Case Study Review
- 2 Group Activity Intro
- 3 Group Activity
- 4 Session Takeaways

Introductions



Sophia Showalter (she/her)



Lucia Santacruz (she/her)



Britney Blankenship (she/her)



Yasmin Abraham (she/her)



Evan Kamei (he/him)



Andrea Guadarrama (she/her)



Shayna Choulet (she/her)



Imran Bell (he/him)



What Role Does Data Play in Equitable Program Design?

1. Data helps to **reduce unconscious bias** found in casual observance & memory.
2. **Qualitative** data collected from program participants, community members, and the market sheds light on quantitative data points.
3. Data reporting creates **accountability** mechanisms for program sponsors, designers, & implementors.
4. Data provides an **informed springboard** for community & market **stakeholders** to participate in early phases of program design & strategy.

Analyzing Data to Understand Equity Impacts

Step 1:

Identify data analysis subjects: program(s) & target customer segment(s).

Step 3:

Collect program data points. Select & compile 3rd party datasets.

Step 5:

Review data analysis results and draft takeaways with input from market & community SMEs.

Step 2:

Finalize research questions. Consult utility, program team, market & community stakeholders where feasible.

Step 4:

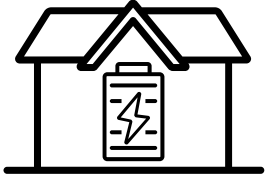
Conduct data analysis to answer research questions.

Step 6:

Apply industry case studies, best practices, market & community information, & historical program knowledge to compile recommendations.



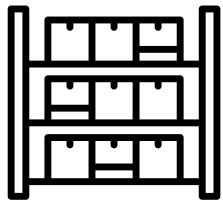
Case Study: Program Details



Single family & multi-family residential heating, ventilation, and air conditioning (HVAC) & water heating (WH) program



Based in “New Dakota”, a state in the **Pacific Northwest**



Program launched **4 years ago** through a **midstream** program model (i.e., the program primarily incentivizes distributors to stock and sell high efficiency HVAC and WH equipment)



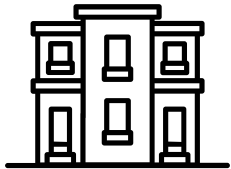
Opportunity: Understand program’s baseline (historical) **equity impacts** & implement **initiatives to increase** equity impacts over the next **3 years**.

Case Study: Target Customer Segment

The utility sponsor is primarily concerned with equitably serving “**disproportionately impacted populations**”, defined as census tracts that meet one or more of the following:



Score in the bottom **30%** of a statewide assessment of environmental, social, & health risks

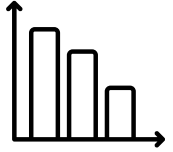


Have a median household income at or below **80% State Median Income (SMI)**

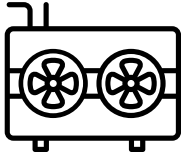


Contain **tribal lands**

Case Study: Key Takeaways



As the Program continues to grow, the rate of participation from Disproportionately Impacted Populations **does not**.



Disproportionately Impacted Populations have a **higher rate** of program participation via high efficiency **natural gas equipment** than electric equipment.



Overall program participation is highest for single family buildings while the Disproportionately Impacted Populations participation is highest for **multifamily high-rise buildings**. Multifamily low-rise was least represented across the program.



Participation is highest in **higher-income census tracts** with **fewer renters**.

Community Priorities	Utility Priorities & Program Requirements
Affordable & reliable energy service	Improve program equity outcomes
Prioritize health benefits & home comfort for customers	Build & maintain strong community relationships
Ease of system maintenance	Maintain portfolio cost-effectiveness
Program accessibility	Workforce development

Small Group Activity

10 minutes	Gather Information <ul style="list-style-type: none">• Review Case Study
15 minutes	Assessment <ul style="list-style-type: none">• Define Gaps• Identify Opportunities
10 minutes	Allocate Budget <ul style="list-style-type: none">• Define Solutions
15 minutes	Share Solutions <ul style="list-style-type: none">• Pitch Solutions to Speakers

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Conclusion

What is one key takeaway you want attendees to remember?

Thank you to our speakers & session attendees!

Find the case study, small group activity, and this presentation at:



SCAN ME

