From First-Come to Fair: Co-Creating a Project Selection Framework for an Affordable Housing Energy Program

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ABSTRACT

After recognizing that certain communities in Oregon were consistently underrepresented among beneficiaries of an income-qualified multifamily energy program, a state agency initiated a revision of its project funding framework. The program's prior first-come, first-served approach tended to favor applicants with institutional capacity or with projects in major metropolitan areas, while overlooking the lived realities of residents and housing providers in under-resourced areas.

To address these limitations, the agency created a coalition of community members representing diverse professional and lived experiences relevant to the program, including backgrounds in public health, weatherization, community engagement, and affordable housing who also reflected the racial, ethnic, geographic, and socioeconomic diversity of Oregon. The coalition was charged with identifying participation barriers, recommending design modifications, and improving program accessibility for historically underserved groups.

Over several months, coalition members and program staff examined data sources, assessed local challenges, and explored how limited resources should be allocated. This process emphasized shared learning, transparency, and the integration of both community insight and administrative knowledge.

The resulting scoring framework combines quantitative measures (e.g., energy burden; racial and ethnicity data, and rural[1] location) with qualitative indicators (e.g., partnerships and community relationships; organization's relationships with culturally responsive/specific organizations). This paper documents the co-creation process, drawing on reflections from agency staff, the program implementation team, facilitators, and coalition members. After three years of learning, implementing, and evaluating, this paper shares key lessons learned about translating commitments to fairness into concrete program design through community co-creation.

Introduction

Oregon faces a pressing challenge in ensuring access to affordable housing, with many low-income households struggling to meet basic housing and utility costs. To address this crisis,

[1] OR-MEP defines "rural" based on Oregon Health & Science University's Office of Rural Health definition: *Rural as any geographic areas in Oregon ten or more miles from the centroid of a population center of 40,000 people or more.* https://www.ohsu.edu/oregon-office-of-rural-health/about-rural-and-frontier-data

the state has set ambitious goals[2] to expand affordable housing options, reduce energy burdens, and promote sustainability. One of these efforts is the Oregon Multifamily Energy Program (OR-MEP), which launched in 2017 and is administered by the state's housing finance agency, Oregon Housing and Community Services[3] (OHCS), and implemented by TRC[4].

OR-MEP is primarily funded through ratepayer contributions via a legislatively enacted "public purpose charge" on every utility bill. This charge goes toward energy conservation in schools, renewable energy projects, and low-income housing programs. OR-MEP supports energy efficiency improvements in new and existing affordable[5] multifamily rental properties served by the state's two largest investor-owned electric utilities, Portland General Electric (PGE) and Pacific Power (PAC).

OR-MEP provides cash incentives, design assistance, coordination with regional programs, and education about energy-efficient upgrades. OR-MEP's primary goal is to benefit low-income Oregonians by lowering utility costs and improving living conditions to foster resilient, energy-efficient housing where all residents can thrive.

Despite enrolling nearly 100 multifamily properties comprised of 7,000 dwelling units between 2017-2020, OR-MEP was not delivering equitable outcomes. Disparities in program participation emerged due to the first-come, first-served enrollment process, which compounded the effects of the program's geographic eligibility boundaries that limited participation to properties within PGE and PAC service areas, as shown in Figure 1. As a result, rural and under-resourced communities were left behind.

In 2020, OHCS committed to addressing systemic inequities within the energy industry and beyond. A pivotal moment came with the Special Director's Message on June 3, 2020, where Executive Director Margaret Solle Salazar articulated the agency's commitment to advancing racial equity.

> *"[In] order to disrupt entrenched systems that perpetuate racial inequality, we at OHCS must do the work of 'getting our own house in order.' Transformative systems change requires truth telling and accountability…As we move forward, we will continue listening to Black, Indigenous, and other people of color and joining together to support fierce struggles for equity and justice…OHCS affirms our support of Black, Brown, and Indigenous people in OHCS and in the diverse communities we serve."*

To follow through on this commitment, OHCS and TRC initiated the development of a Diversity, Equity, and Inclusion (DEI) plan. The team promptly realized that, to have the greatest impact and represent community needs, the DEI plan should be developed in collaboration with affordable housing stakeholders throughout Oregon. To this end, the program then paused work on the DEI plan and instead established the OR-MEP DEI Coalition as a means to engage stakeholders in the process.

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[2] Oregon's affordable housing goals were set out across six priority areas in the 2019-2024 Statewide Housing Plan (SWHP). The final report details the SWHP goals and OHCS' progress in meeting them. That report is available here: https://www.oregon.gov/ohcs/Documents/swhp/Final-Report-SWHP-OHCS.pdf

[3] More information about Oregon Housing and Community Services is available here: https://www.oregon.gov/ohcs

[4] TRC is a global consultancy specializing in energy, environmental, and infrastructure solutions. More information on TRC is available here: https://www.trccompanies.com/

[5] OR-MEP serves multiple types of affordable housing. Comprehensive eligibility criteria is outlined in the program manual, available here: https://oregonmultifamilyenergy.com/resources/

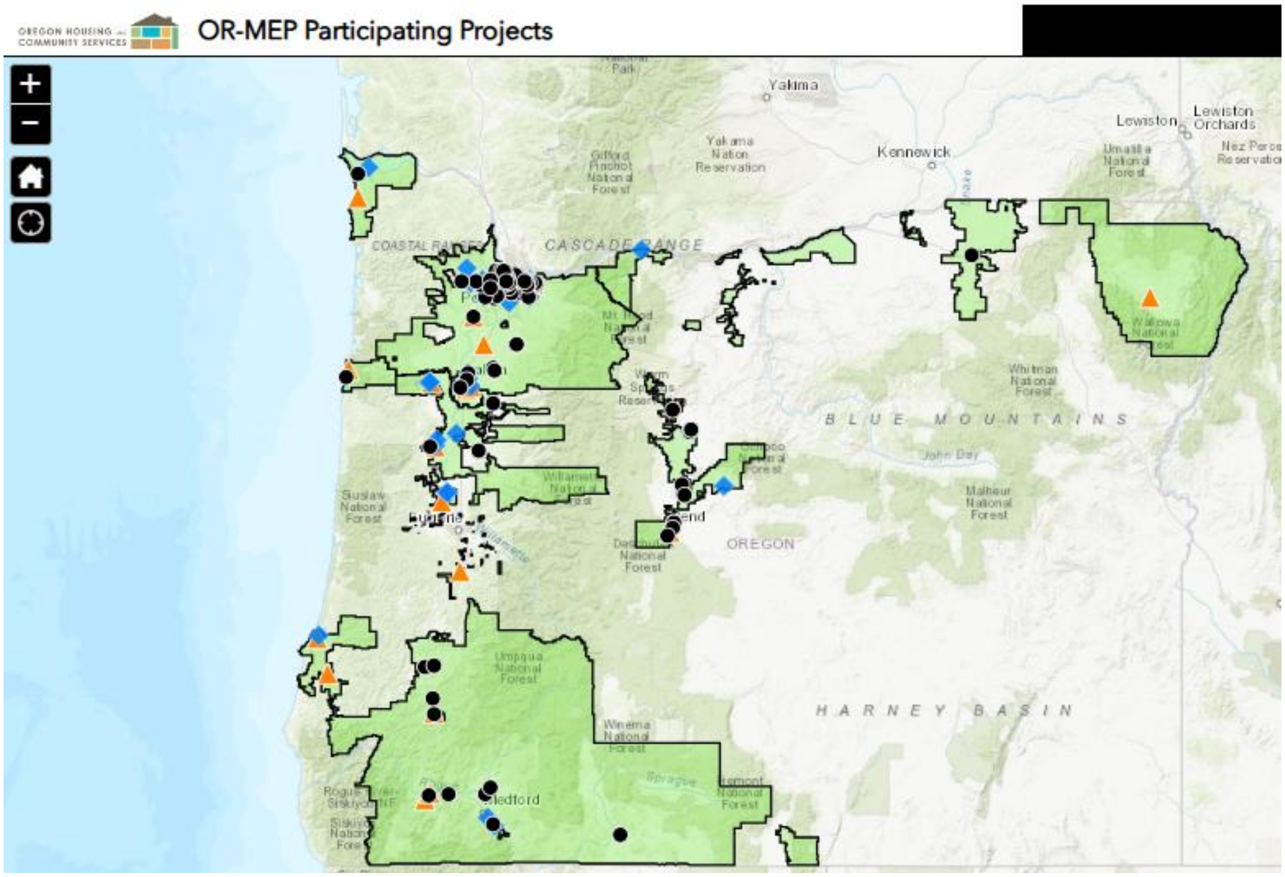

Figure 1. OR-MEP participating projects map. Green shaded area depicts OR-MEP eligible utility service area.

Formation of the Coalition

Formed in March 2022, the Coalition brought together affordable housing residents, staff, and industry professionals, using a "with us, not for us" approach to co-create solutions to barriers and make the program more accessible to underserved communities. The diverse composition of the Coalition was foundational to both the integrity of the approach and understanding how policy outcomes are experienced across racial, ethnic, socioeconomic, and geographic contexts – particularly among communities historically excluded from resource allocation.

Described in detail in later sections, the Coalition's initial charge was to examine how existing program structures may have limited access for residents of color, rural communities, individuals for whom English is not their first language, and households with low incomes. That analysis resulted in a new project selection framework that shifted from the first-come approach to a fair and equitable process.

Need for Equity in Project Selection

OR-MEP was initially designed to distribute funds to eligible properties as swiftly as possible, without consideration of which customers were – and were not – benefitting from that approach. The program serves affordable multifamily properties statewide, engaging housing providers and residents with wide-ranging identities, capacities, and local conditions. While all eligible properties demonstrate substantial need and high energy burden, needs manifest differently across communities – and historically underserved groups (e.g., rural communities, those facing language barriers or limited institutional support) often experience compounding challenges that standard metrics do not fully capture.

When the program's DEI Coalition came online, they showed the Program Team that systemic barriers that disproportionately limited access were embedded in the program's policies, procedures, and documentation. While effective at accelerating fund distribution, the "first-come, first-served" approach contradicted OR-MEP's commitment to equitably serving the people of Oregon – and inspired the Program Team to take decisive action toward sustainable change. Aligning program goals with the needs of historically underserved groups became a critical step in reassessing what success meant and whom the program was designed to reach, especially under conditions of constrained resources.

Rationale for Sustained Advisory Engagement

Without the intentional and consistent representation of community voices, the program risked reinforcing structural inequities. Hearing from people with different lived and professional experiences helped ensure that decisions about access and priority reflected the realities of the communities the program aimed to serve. Structuring the Coalition as an ongoing advisory body rather than a one-time input session created conditions for shared learning, trust-building, and iterative refinement – critical elements in translating equity commitments into operational design.

Composition of the Coalition

The Coalition is intentionally composed to reflect a balance of technical expertise, lived experience, and community-based perspectives. To frame recruitment, the Program Team identified professional roles to provide insight into OR-MEP design. Initial recruitment was aimed to convene a coalition representing the roles, defined in Figure 2, that would best represent the needs of Oregon's diverse communities. Since the Coalition's inception in 2022, the total number of active members has varied between ten and thirteen, with multiple representatives across different roles based on members' identities and experience. Coalition members were initially paid at a rate of $100/hour. This was raised to $110/hour after the initial three-year period. (Coalition members are direct subcontractors to TRC and receive payment via check or direct deposit.)

Coalition facilitation team		
	Co-Facilitator 1	**Co-Facilitator 2**
Coalition members		
	• Affordable Housing Property Manager/Owner • Affordable Housing Residents/Community Member • Community Based Organization Representative • Community or Public Health Worker	• Affordable Housing Finance Specialist • Workforce Development Specialis • Energy Industry Professional • Rural Resident • Representative of Indigenous Communities

Figure 2. OR-MEP DEI Coalition composition

To ensure the Coalition also reflected Oregon's rich diversity of thought, experience, race, ethnicity, religion, and gender, the Program Team implemented a multifaceted recruitment effort. OR-MEP offered support for members who needed access to high-speed internet, a phone or tablet with an embedded web camera, and a headset with a microphone that helped overcome any virtual participation barriers. Acknowledging that the program was developed by people who are predominantly white and who live in urban areas, recruitment gave preference to applicants who identified as BIPOC (Black, Indigenous, or People of Color) and/or those who live or work in a rural area. Recruitment also ensured that Coalition members were representative advocates, trustworthy and supporting of the diverse values and beliefs of Oregonians when making decisions and recommendations. The program sought out applicants who lead with an awareness of how systemic inequities have affected society and customers OR-MEP serves by asking questions such as "In what ways do you stand up for or support others in your community?" and outlining these expectations in the materials applicants reviewed prior to submission (OHCS, n.d.).

Another key component of the Coalition composition was the integration of a neutral, third-party Facilitation Team. In the case of the OR-MEP DEI Coalition, the Program Team retained Encolor[6] and Unrooz Solutions[7] to serve as co-facilitators. As experts in facilitation, DEI, and managing coalitions, they function as a liaison between the Program Team and the Coalition. The Facilitation Team continues to manage all communication between the Program Team and the Coalition and works to ensure that the Coalition's ideas are communicated back to the Program Team and reflected in the work.

[6] Encolor is a certified minority and woman-owned consulting firm who specializes in human-centered research, planning, evaluation, facilitation, and training. More information on Encolor is available here: https://www.encolorconsulting.com

[7] Unrooz Solutions specializes in equitable facilitation, research, design, evaluation, strategy, and policy development through participatory engagement. For more information visit: https://www.unrooz.com

Coalition's Goals and Objectives

The Coalition's purpose is to guide OR-MEP toward more equitable outcomes by identifying systemic barriers, shaping program improvements, and advancing inclusive participation. Grounded in a vision to reduce energy burden for all Oregonians living in multifamily affordable housing, the Coalition serves as an advisory and accountability body that analyzes program design, elevates community-informed insights, and recommends actionable changes to OHCS. Central to this goal is a focus on identifying participation barriers, particularly those affecting communities historically harmed by redlining, environmental injustice, and systemic oppression.

The Coalition advances strategies to improve overall program accessibility, including strengthening partnerships with community-based organizations, enhancing communication and outreach approaches, and supporting more inclusive implementation pathways. Through ongoing collaboration with the Program Team, the Coalition monitors the effectiveness of adopted changes, ensuring that modifications lead to measurable and sustained equity outcomes. As needed, the Coalition guides the Program Team to make adjustments and issue new recommendations as needed to continuously improve program performance.

In addition to broad programmatic design work, Coalition members are also expected to participate in one to two subcommittees. The subcommittees, led by representatives of the Program Team, enable deeper engagement with specific program focus areas and support more targeted analysis and recommendations. Through collaboration with program staff, the Coalition directly influences policies, processes, and outcomes tied to each subcommittee topic. Currently there are four subcommittees: naturally occurring affordable housing (NOAHs), marketing, outreach, and policy. Each subcommittee operates within a defined scope while retaining flexibility to set priorities, meeting schedules, and engagement approaches that reflect emerging needs. This structure helps ensure that the Coalition's work remains both focused and adaptive, while strengthening accountability by embedding continuous feedback loops between the Coalition and the Program Team.

Developing a New Enrollment Scoring System: The Co-Creation Process

Methodology and Approach

The development of a new enrollment scoring system followed a collaborative and iterative process, balancing tight timelines with the need for meaningful stakeholder engagement. Recognizing the urgency to address projects currently waitlisted in the program, the Facilitation Team and Program Team laid the early foundation for the Coalition's work by defining key program equity goals for the Coalition to react to and build upon.

The Coalition and Program Team worked together to design, test, and implement a new enrollment scoring framework aligned with the program's equity goals. Figure 3 provides an overview of the process and key milestones.

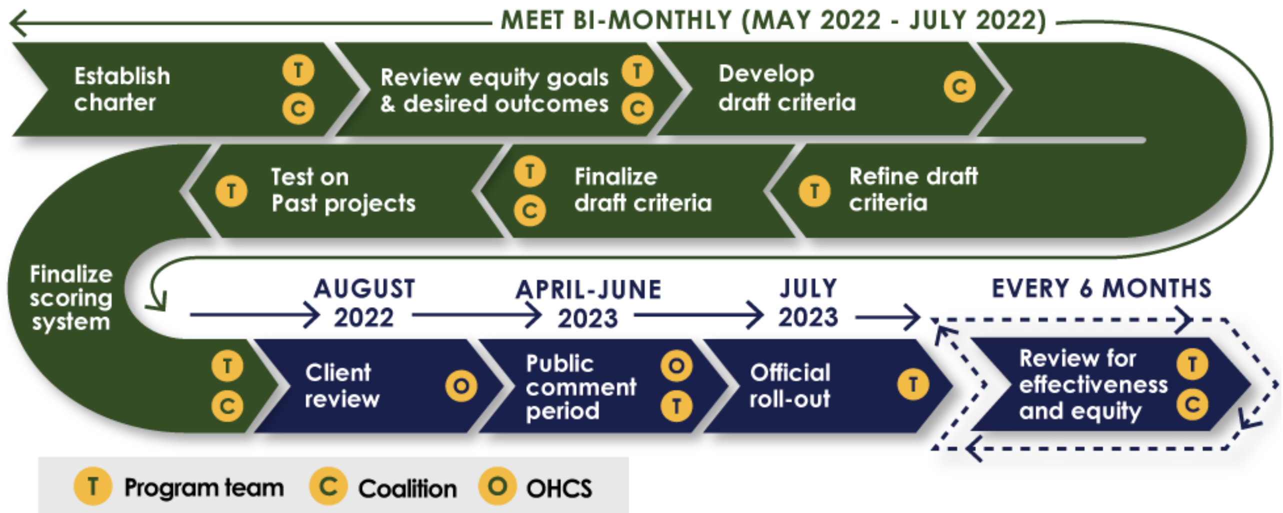

Figure 3. Selection criteria co-design process

Data Collection and Analysis

The co-creation process between the Coalition and the Program Team prioritized the examination of data sources as the basis for informed decision-making. The Program Team led the data collection and analysis phase, sharing findings with the Coalition to facilitate meaningful discussions and uncover innovative ways to define new enrollment criteria. This process incorporated a range of critical data sources to ensure a comprehensive understanding of the program landscape.

The Program Team collected and analyzed current program pipeline data, which included detailed project-level information. This data encompassed key attributes such as city, project status (enrolled, completed, or waitlisted), electric utility, project type (existing or new construction), the number of dwelling units, and project volume by applicant organizations. These mappings provided a clear overview of the program's operational scope and informed subsequent decision-making.

Additionally, the team utilized insights from the *Ten-Year Plan: Reducing the Energy Burden in Oregon Affordable Housing*, a report created in 2019 in response to the Governor's executive order directing state agencies to prioritize energy efficiency in affordable housing to reduce utility costs (OHCS 2019). Two critical metrics from the report were integrated into the analysis: the "high priority area index score," which measured energy burden (as illustrated in Figure 4), and ethnicity and race data. These metrics provided a framework for assessing equity and identifying areas of greatest need.

The Program Team also referenced the existing rural definitions established by OHCS, which are widely applied in other affordable housing programs. These definitions were instrumental in addressing urban and rural disparities within the program.

In addition to quantitative data, the Program Team documented qualitative insights from program participants. These insights highlighted challenges and barriers affecting project outcomes, such as the higher costs and limited workforce capacity in rural areas compared to urban settings. The analysis also identified the influence of timelines and funding allocations from larger state funding sources (such as low-income tax credits) on the ability of an affordable multifamily development to participate in OR-MEP since larger funding sources need to be secured first before an affordable housing project can commit to OR-MEP.

This comprehensive data collection and analysis process not only informed the prioritization of enrollment criteria but also illuminated the interconnected challenges and opportunities within the affordable housing landscape. These findings served as a critical foundation for discussions with the Coalition, ensuring that the enrollment criteria aligned with the program's overarching goals of equity and accessibility.

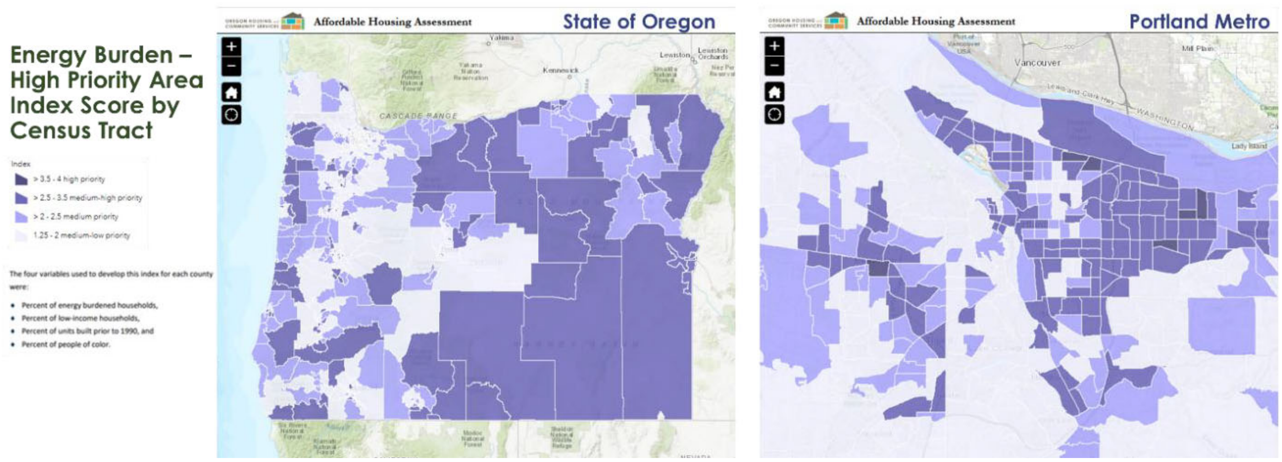

Figure 4. Ten-Year Plan: Oregon Affordable Housing Assessment Map (OHCS 2019). "High priority index area" score measures geographically prioritized communities based on energy burden.

Defining Priority in Resource Allocation

The development of OR-MEP's new scoring framework aimed at redefining what "priority" should mean in the context of equitable program design given finite program resources. Through extensive discussions, the team considered quantitative metrics alongside qualitative considerations, seeking to create a framework that would reflect the diverse needs of Oregon's communities while addressing systemic barriers.

The Coalition and Program Team's distinct perspectives emphasized different priorities based on their experiences and expertise, as illustrated by the recommendations summarized in Tables 1 and 2. Together, they co-created a set of criteria that would guide project selection, focusing on equity, accessibility, and sustainability.

Table 1. Recommendations included in the initial framework

Priority area	Recommended by	Details
Projects located in BIPOC communities and serving BIPOC residents	Both	Addressed disproportionate energy burden faced by BIPOC populations while mitigating risks of gentrification and displacement.
Nonprofit applicants	Coalition	Recognized resource constraints faced by nonprofits compared to for-profit developers. Program Team expanded the criterion to include housing authorities who are similarly resource constrained.
Projects achieving green building certifications	Coalition	Promoted sustainability. Program Team supported the goal but recommended focusing on high-performance design instead of formal certifications due to cost barriers.
Projects located in communities with high energy burdens, regardless of race	Program Team	Aligned with the program's goal of reducing utility costs for low-income households and addressing disparities in energy access. Fully supported by the Coalition.
Projects in rural areas	Program Team	Recognized unique challenges faced by rural communities. Fully supported by the Coalition.
Naturally occurring affordable housing (NOAH) projects	Program Team	Preserved affordable housing through energy upgrades. NOAH projects committed to a 10-year affordability agreement with OHCS to receive funding.
First-time applicants to OR-MEP	Program Team	Aimed to expand the program's reach and support organizations that previously struggled to access funding.

Table 2. Recommendations not included in the initial framework

Priority area	Recommended by	Details
Projects using local minority- or women-owned contractors (e.g., COBID[8]-certified)	Coalition	Excluded due to feasibility concerns, as specifying contractor requirements adds additional financial burdens to projects and emerging contractors.
Projects demonstrating positive health impacts for tenants	Coalition	Excluded as measuring health outcomes would require post-completion evaluations, which were not feasible under the program's design.
Applicants with a history of community service	Coalition	Initially excluded but later incorporated into the second round of criteria to better assess how projects serve BIPOC communities and address their specific needs.
Applicants incorporating culturally specific programming	Coalition	Initially excluded but later incorporated into the second round of criteria to better assess how projects serve BIPOC communities and address their specific needs.

The New Enrollment Framework

The creation of OR-MEP's new enrollment scoring framework marked a pivotal step in efforts to transform the program into a more equitable and accessible initiative. Building on the

[8] Certification Office for Business Inclusion and Diversity (COBID) is Oregon's sole certification authority. It qualifies minority, woman, service-disabled/veteran-owned businesses, and emerging small businesses to bid on public contracts. More information is available here: https://www.oregon.gov/biz/programs/cobid/

collaborative process between the Coalition and Program Team to define priority participants, the Program Team set out to design a scoring framework that was both user-friendly and impactful. This framework would serve as the foundation for a new competitive application process called OR-MEP Open Enrollment, with enrollment rounds opening every six months.

The first round of Open Enrollment, launched in July 2023, introduced a scoring system that balanced quantitative and qualitative criteria to evaluate each project application (Table 3). The framework included eight scored components. Table 4 illustrates the scoring categories and their respective weightings. Scoring weightings were assigned based on priorities discussed between Coalition and Program Team.

Table 3. Initial enrollment scoring categories

	Assessment type		
Criterion	Quant.	Qual.	Details
Project is in a BIPOC community	✓		Scored 0-5 points based on census tracts with high percentage of BIPOC residents. Data sourced from Ten-Year Plan Affordable Housing Assessment Map. *(e.g., 25-34% BIPOC in Census Tract = 3 points)*
Project is primarily serving BIPOC residents		✓	Scored 0-5 points based on level of partnership with a BIPOC-led culturally specific organization and narrative response describing the organization's work in the BIPOC community.
Project's high priority area index score (energy burden)	✓		Scored 0-5 points based on location within high energy burden communities. Data sourced from "High Priority Area Index – Census Tract – Index" layer.
Project is in a rural area	✓		5 points for projects in rural areas based on OHCS' definition of "Non-Urban/Rural" regions.
Project is naturally occurring affordable housing (NOAH)		✓	5 points for NOAH projects, requiring a 10-year affordability agreement with OHCS to receive funding.
Applicant entity is a non-profit or housing authority		✓	2 points for non-profits (501(c)(3)) and housing authorities associated with government entities to elevate under-resourced applicants.
Project is planned as a highly energy-efficient performing building		✓	2 points for projects targeting high energy performance (e.g., net zero energy, passive house). Applicants described target levels, upgrades, and team experience.
Applicant entity organization's first time applying or previously never received OR-MEP funding		✓	2 points for first-time applicants to diversify participants and expand program access.

Table 4. Initial enrollment scoring categories and weighting

Category	Max total points	% of points
BIPOC (Community + Residents)	10	32.2%
High Priority Area Index (Energy Burden)	5	16.1%
Rural	5	16.1%
Naturally occurring affordable housing (NOAH)	5	16.1%
Non-profit/housing authority	2	6.5%
Energy-efficient design	2	6.5%
First-time participant	2	6.5%
Total	31	100%

Implementation and Evaluation

Initial Implementation of the New Enrollment Framework

To ensure a smooth rollout of the new scoring system, the Program Team streamlined the application process and provided support to property owner and developer applicants. The application was designed to be straightforward and efficient, with quantitative categories automatically calculating scores based on project addresses. Qualitative categories were limited to simple yes-or-no responses, with minimal narrative requirements. Applicants could view their scores in real-time as they entered information, ensuring full transparency upon submission of a completed application. Orientation webinars, office hours, and email and phone support guided applicants at every stage.

The Program Team ensured that applications were reviewed promptly, and acceptance or non-acceptance decisions were finalized within 30 days. Selection and non-selection letters were issued simultaneously. For projects not selected, the team offered one-on-one meetings to explain the decision, provide feedback on the scoring system, and connect applicants with alternative funding opportunities, while gathering insights to refine the system. The Program Team also administered surveys to applicants – including those who were selected and those who were not – to gather ongoing feedback anonymously.

To enhance transparency and celebrate the outcomes, a blog post[9] was published on the program website after each round of selections, highlighting the selected projects and their plans. The posts included detailed metrics on scoring, such as average scores graphs (as shown in Figure 5), project names, locations, and applicant entities, along with maps showing the geographical distribution of selected projects. This effort ensured clarity and accountability while showcasing the impact of the new framework.

[9] OR-MEP Open Enrollment 2025-Round 2 blog post example: https://oregonmultifamilyenergy.com/2025/10/21/announcing-or-mep-open-enrollment-2025-round-2-selected-projects/

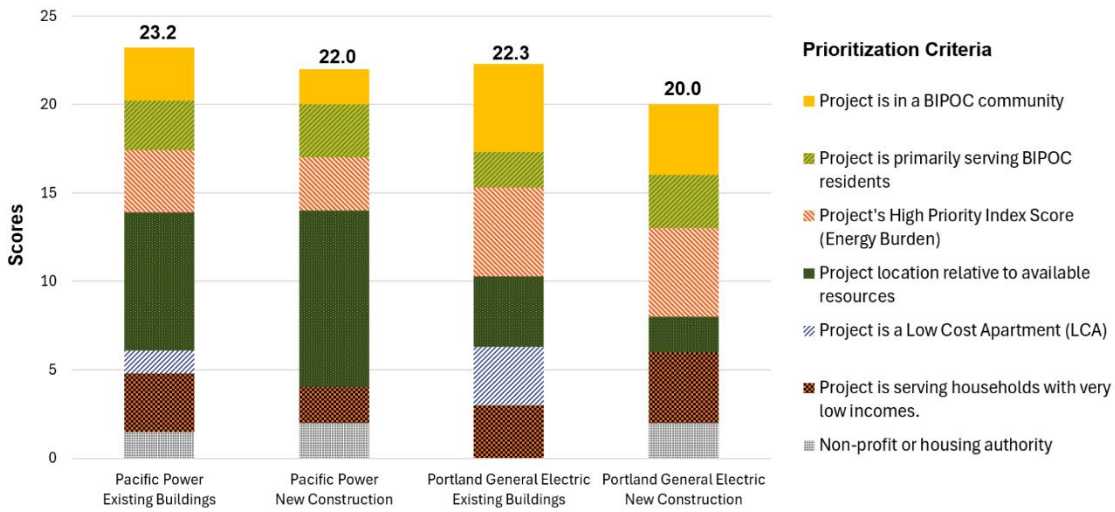

Figure 5. OR-MEP Open Enrollment 2025, Round 2. A graph of selected projects' average scores by prioritization criteria within each of the four funding categories[10].

Adjustments and Iterative Improvements

The co-creation process was designed to be iterative, with continuous adjustments informed by evaluation findings, community feedback, and program performance data. OR-MEP embedded learning and adaptation into its implementation approach, allowing the program to evolve in response to emerging insights and shifting community needs.

Following each round of open enrollment, the Program Team and Coalition worked collaboratively to review the results and evaluate whether the scoring criteria are effectively achieving the intended outcomes. Rather than setting fixed targets for each round, the evaluation process considered the unique composition of project applicants, which varied from round to round. Each round is assessed independently by comparing data from selected and non-selected applicants, and by engaging in discussions to determine whether the scoring system is successfully prioritizing the intended projects or requires adjustments. The Program Team also shares challenges encountered during the application process with the Coalition, seeking their input and guidance. These discussions often uncover opportunities to refine the criteria, ensuring stronger alignment with program goals.

An Example of Iterative Improvement

Following the first two rounds of enrollment cycles in Spring 2024, the Program Team noticed there were several applicants who primarily served BIPOC residents in rural areas but were not BIPOC-led organizations and were less likely than their urban counterparts to have

[10] The four funding categories are determined by program funding requirements and are not directly linked to new enrollment priorities. OR-MEP is funded by ratepayer contributions from Oregon's two primary investor-owned utilities: Pacific Power and Portland General Electric. Program funds are evenly divided, with 50% allocated to each utility. Additionally, OR-MEP funding is equally split between existing and new construction affordable multifamily property types.

access to community partner organizations that are BIPOC-led. Therefore, those applicants were unlikely to earn a high enough score to be selected for participation.

The Facilitation Team convened the Program Team and Coalition to discuss implications of the scoring criteria and consider revisions before the next round of open enrollment. The Coalition and Program Team discussed the potential implications of the existing scoring criteria and potential adjustments before the Coalition recommended an approach wherein a project in a rural community could receive points whether it partnered with a BIPOC-led community organization or a community organization supporting BIPOC communities with non-BIPOC leadership. To support the Program Team in scoring responses, the Coalition also generated a list of questions to help assess the impact a community organization that is not BIPOC-led has on the community it serves.

These questions helped determine whether the organization recruits and promotes staff and board members who reflect the cultural diversity of the communities they aim to serve, maintains non-discrimination policies, and provides DEI and culturally appropriate service training for staff. Additionally, the evaluation examined whether the organization has a clear strategy for serving BIPOC communities, offers inclusive intake forms and multilingual materials, provides free interpreter services for clients with limited English proficiency, collects demographic data to measure its impact, and engages in partnerships with agencies that serve diverse cultural groups.

These questions led to quality responses, with all seven projects led by or partnered with BIPOC-led organizations in a rural community receiving funding in the following round after this change was implemented. The Coalition also re-defined "rural" around the Oregon Office of Rural Health definition of rural, allowing for three projects to receive funding that previously would not have qualified.

This iterative cycle underscored the importance of ongoing learning as a core program function. Feedback loops between the Coalition and Program Team were facilitated by the Facilitation Team to ensure that lessons learned are documented and actively used to inform decision making. As new challenges and opportunities arise, the Coalition continues to refine its recommendations, supporting a dynamic process of adaptation that strengthens program responsiveness and accountability over time. The willingness to test recommendations in real time and improve based on the data the program collects is a foundational strategy that allows the Program to advance long-term equity and ensure that program benefits are distributed more fairly across Oregon's diverse communities.

Impact of New Enrollment Criteria

The launch of OR-MEP's first Open Enrollment cycle that implemented the equity-centered criteria in July 2023 marked a significant shift in the program's approach to project selection. Open Enrollment rounds now occur every six months, and to date, six rounds have been completed. Table 5 provides a summary of the characteristics of selected projects and the measurable impact of the new enrollment criteria. These process improvements have led to substantial advancements in program outcomes compared to the previous first-come, first-served enrollment model, including:

- Increased representation of projects partnering with or owned by BIPOC-led organizations. A total of 39 such projects have been selected, accounting for 29% of all projects, whereas this data was not tracked or measurable under the previous enrollment model.

- Prioritization of communities with very high energy burdens, selecting 45 projects (52% of total projects) compared to 38 projects (39%) under the first-come, first-served approach.
- Improved support for residents navigating very low incomes[11], with 29 projects specifically serving this demographic, though comparable data was not tracked previously.
- Significant benefits to rural communities, with 55 rural projects selected (42% of total projects), a notable increase from the 29 rural projects (29%) enrolled under the old system.
- An expanded focus on NOAH projects, selecting 25 such projects (19% of total projects), compared to just 5 projects (5%) under the previous model.
- A boost in non-profit ownership, with 82 projects owned by non-profits (62% of total projects), up from 56 projects (56%) under the first-come, first-served system.

Across all metrics, the new equity-centered enrollment criteria have driven meaningful progress in addressing historic gaps in program access. By prioritizing underserved communities and aligning project selection with equity goals, OR-MEP made significant strides toward creating a more inclusive and impactful program.

Table 5. Characteristics of selected projects.

Characteristics	2023-Round 1	2024-Round 1	2024-Round 2	2025-Round 1	2025-Round 2	2026-Round 1	Total to date
Total applicants	49	66	39	38	37	32	261
Total selected	19	33	24	14	11	32	133
Total funding available	$2,500,000	$3,062,000	$2,765,000	$1,825,000	$1,279,000	$4,500,000	$15,931,000
Partnering or owned by BIPOC-led organization	- (-)	13 (39%)	3 (13%)	5 (36%)	5 (45%)	13 (41%)	39 (29%)
Energy burden High Priority Index Score >3	12 (63%)	18 (55%)	13 (54%)	8 (57%)	5 (45%)	13 (41%)	69 (52%)
Residents navigating very low incomes	- (-)	16 (48%)	7 (29%)	8 (57%)	8 (73%)	13 (41%)	52 (39%)
Rural	5 (26%)	22 (67%)	12 (0.5)	5 (36%)	6 (55%)	5 (16%)	55 (41%)
NOAH	4 (21%)	2 (6%)	4 (17%)	3 (21%)	3 (27%)	9 (28%)	25 (19%)
Non-profit or housing authority	12 (63%)	15 (45%)	17 (71%)	11 (79%)	7 (64%)	20 (0.625)	82 (62%)

Conclusion & Lessons Learned

Key Takeaways from the Co-Creation Process

The co-creation process generated several lessons for agencies seeking to incorporate community perspectives into program design. These takeaways reflect the practical conditions

[11] Properties in which at least 50% of units are at or below 80% AMI are eligible for OR-MEP funds.

that enabled collaboration between the Coalition, Program Team, and OHCS leadership to translate equity goals into operational decisions:

- **Community involvement strengthens solutions alignment.** The program engaged individuals with diverse lived and professional experience in affordable housing to ensure that proposed changes would reflect real-world priorities and result in tangible improvements for different Oregon communities.
- **Leadership commitment influences design integrity.** Program leaders allocated resources, responded substantively to recommendations, and shared decision-making authority to ensure that the Coalition's contributions would shape final outcomes.
- **Iteration improves decision quality.** The Coalition and Program Team tested, debated, and refined scoring criteria across multiple rounds of review allowing the team to revisit assumptions and adjust proposals before final adoption.
- **Quantitative and qualitative insights operate in tandem.** The Program Team gathered data around energy burden, ethnicity and race, and rural communities to articulate reference points and baseline assumptions, while Coalition members contextualized those metrics with additional qualitative scoring criteria that reflected on-the-ground experience.
- **Constructive disagreement produces stronger outcomes.** Co-creators approached disagreement with respect, humility, and curiosity, building shared ownership of outcomes, surfacing underlying assumptions, and improving the clarity of final decisions.
- **Shared definitions strengthen decision making.** Establishing a common understanding of key concepts such as equity early in the process helps participants weigh competing priorities, apply criteria consistently, and communicate decisions more clearly.

Broader Implications for Equity-Focused Programs

Coalition-based co-design offers a replicable approach for energy and housing programs seeking to align decision making with community priorities. Co-design has been shown to be most effective when participants can meaningfully influence outcomes (Bovaird 2007; Nabatchi, Sancino, and Sicilia 2017). It is less effective when decisions are tightly constrained, symbolic, or predetermined as it can undermine trust when ownership of key decisions is not shared.

Agencies seeking similar approaches should define clear roles, responsibilities, and decision-making authority at the outset. Co-design works best when leadership commits adequate time and resources, shares decision-making authority, and supports iterative dialogue to test, refine, and revisit proposals. Programs should assess whether they can meet community stakeholders where they are and whether leaders are prepared to engage in candid, and at times uncomfortable, feedback. When these conditions exist, coalition-based co-design can translate equity commitments into durable program change.

References

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AI-assisted Tools Disclosures

AI-assisted tools used: ChatGPT, TRC-GPT.
Used for: drafting text, editing text, sourcing references.
Extent: light use for generating initial draft content and editing text.
Human review: The authors reviewed and verified all content and citations.