

Designing for All: How Targeted Universalism Can Expand Reach and Impact in Energy Programs

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ABSTRACT

Demand-side management programs have historically prioritized total energy savings over who benefits from those savings, resulting in uneven participation and inequitable outcomes across communities and customer groups. While recent efforts have introduced equity-focused program design, these approaches often concentrate on closing participation gaps between groups rather than ensuring all customers can achieve meaningful outcomes. This paper introduces targeted universalism (T/U)—a framework that combines universal goals with targeted implementation pathways—as a next evolution of equity in energy efficiency and clean energy programming.

Drawing on the theoretical foundations of T/U and its five-step design process, the paper examines how this approach reframes program development by emphasizing shared goals while acknowledging the varied structural barriers faced by different populations. Through case studies from healthcare and education—Vision for Baltimore and the Chicago Public Schools Equity Framework respectively—the paper illustrates how T/U operates in practice to expand access, improve outcomes, and reduce the backlash that is often associated with targeted interventions.

The paper then translates these insights into near-term changes that are viable within the energy sector, arguing that T/U offers a practical and resilient pathway to increase participation, address affordability challenges, and meet growing system demands. It outlines actionable steps for implementation, including establishing ambitious universal goals, embedding community engagement in decision-making, and integrating ongoing evaluation into program design.

Introduction

With the origin of demand-side management (DSM) programs in the 1970s, utilities first began to consider how to engage customers beyond collecting bill payments as customers controlling their usage, which was necessary for utilities to achieve their goals (Greer and Fry 2026). The initial metric of success was total energy saved, and utilities had great success leveraging incentives to encourage customers to decrease usage (Eno 1996). Who benefited from savings and who did not was unimportant. The energy industry more recently recognized that not every community has experienced the benefits of programs equally, giving rise to programs for people with low to moderate incomes (Effinger, Dortin, and Turner 2025). This recognition, coupled with growing recognition that income alone does not determine whether a person participates in utility programs, led to more equity-tailored programs focused on specific customer classes.

To be more equitable, energy efficiency and clean energy (EECE) programs have implemented barrier mitigation efforts including rebates, targeted marketing, community engagement efforts, culturally specific outreach, and other efforts in order to help energy service providers reach more customers (Amann, Tolentino, and York 2023). While positive strategies to reach community, EECE programs have long leveraged the same set of strategies to improve program participation with little variation across target populations—meaning many customers with nuanced needs and overlapping barriers have still yet to participate or benefit from said programs. With increased load growth adding strain to the grid, more extreme and frequent weather events, and a growing affordability crisis, EECE programs will require new and innovative approaches to reach those customers they have yet to engage. Reaching these customers will require custom pathways for participation designed around the unique needs of people and their communities. The energy industry has already begun to respond to this call by increasing partnerships with community-based organizations (CBOs) to support outreach and, in some cases, implementation. This approach helps to overcome the recruitment barriers that communities may experience related to fear of exposure or stigma, challenges understanding programs, cultural beliefs that may shape participation, and other community-specific barriers (Roncarolo et. al 2022). While recruitment may vary based around community needs, participants generally don't experience customized participation pathways designed around their needs once they have been recruited.

Targeted universalism (T/U), sometimes referred to as “Equity 2.0,” presents an opportunity to respond to this gap in energy program design. T/U is designed to support the needs of all groups, even those who hold more power or exist in the majority (powell, Medendian, and Ake 2019). In essence, T/U is about bringing all groups closer to a universal goal using targeted strategies designed for their diverse needs and context. This makes programs designed with a T/U framework successful at reaching more people *and* more resistant to backlash—something increasingly important when equity has been challenged federally.

As a highly regulated industry, we often look at existing energy industry practices and standards to motivate program and policy design. However, when equity is being challenged and programs must be able to reach more and new customers to ensure utilities can achieve their reliability goals, this paper is an invitation to look outside of what we already know to understand how other industries have been able to innovate on their approaches and broaden their reach to serve more collective goals.

This paper first introduces the concept of T/U and describes what differentiates T/U from equity. It then segues into case studies from health care and education to illustrate T/U's impact. The paper closes with an exploration of what the energy industry can take from T/U into program design to help ensure our programs are resilient to backlash, able to achieve complex goals, and deliver benefit to communities beyond those groups who have been able to reap the benefits through universally designed programs since the inception of the DSM framework.

Theoretical Foundation of Targeted Universalism

At its core, targeted universalism (T/U) is a program and policy design concept that begins with setting a universal goal for all groups and individuals within a community to achieve and then develops targeted pathways to deliver the individualized support each group needs to achieve said goal (Menendian 2024). Originally developed by John A. Powell and the Othering & Belonging Institute at the University of California, Berkeley, T/U aims to bridge the divide between universal goals, which are legitimate and unifying, with targeted processes, which are efficient yet often divisive, to create inclusive, sustainable policies and programs (Powell, Menendian, and Reece 2009).

Established during the financial and housing crisis of 2009, in which significant federal funding was funneled through states to stimulate the economy, develop housing, and put people back to work (FCC 2009), T/U was meant to help states ensure that those with the most need benefited from the stimulus rather than continue to funnel dollars into predominantly white, infrastructure-ready communities. Historically, policies and programs have been designed in either a universal or targeted framework. Powell (2017) posited that these were false choices which failed to recognize that we are all part of the same social fabric and should all be able to achieve the same goals. Instead, Powell called program designers and policymakers to recognize the reality that different groups are situated closer or farther from the goal based on conditions beyond their control and to design specific targeted pathways to support groups based on their positionality. In many ways, T/U was—and still is—an invitation to be bold and innovative in policy and program design, breaking free from the limitations of an “either-or” approach and opening possibilities for experimental design (Othering & Belonging Institute 2025).

To understand T/U, it is first helpful to understand what universalism and targeting both intend to achieve. *Universal policies* aspire to serve everyone regardless of their identity or experience; this includes programs and policies in which benefits are extended to all people or where minimum protections, entitlements, and rights are extended to all (Bagenstos 2014). Canada’s publicly funded, single-payer healthcare system which provides universal coverage for medically necessary hospital and physician services for free at the point of care is an example of a universal policy, as is a utility rebate program made available to all customers regardless of income. Universal policies are available to everyone. Consider Universal Basic Income (UBI), which grants everyone a regular, unconditional cash payment. Even the wealthiest person in a community would theoretically be paid this benefit. While it’s rare that universal policies are truly applied in this way, universal policies often exacerbate disparities by falsely treating everyone the same and providing inadequate support to those with the most need (Menendian 2024). By giving everyone exactly the same support, universal policies tend to benefit those who have the most resources, because equal distribution across all people means that those who have the least resources tend to need more than is available to them to be on the same playing field.

Targeted policies, on the other hand, serve or provide benefits or protections for specific groups or discrete populations, meaning they are generally designed for certain social groups or individuals (Greenstein 2022). The aim is not to exclude; it is to address a problem that is unique to the group the solution targets. The Child Tax Credit, which is available only to parents, and the Weatherization Assistance Program, which is available only to people experiencing incomes below a certain threshold, are examples of targeted policies and programs. Targeted policies and programs are well meaning and often deliver support to communities with the most need; yet they carry with them the unintended risk of creating divisiveness wherein the group who is not eligible for support perceives the group receiving support as receiving a benefit they have not earned. Consider the Supplemental Nutrition Assistance Program (SNAP), for example. The program is designed to support families experiencing low incomes. While technically this service could benefit any of us should we experience hardship, many people, specifically those right above the threshold, carry a belief that those receiving the benefits are undeserving. This perception comes from a “zero sum” mentality, or the false belief that supporting one group means that something must be taken from another (Pukelis and Holcomb 2025). Despite the reality that targeted policies and programs keep twice as many people under 65 out of poverty than Social Security and Unemployment Insurance combined (Greenstein 2022), they still receive the most pushback because many of the folks who are not eligible for targeted programs perceive themselves as not doing well and needing support to thrive (powell 2022).

By requiring supportive implementation pathways for everyone to reach a universal goal—including support for the groups who are nearest to achieving it—T/U helps to avoid this backlash and improve its resilience to criticism. It is the variation in approach that sets T/U apart. It is also what challenges us to think more expansively than current program design paradigms allow, and what makes T/U resilient to the face of backlash against equity.

Equity 2.0

According to the American Council for an Energy-Efficient Economy (ACEEE), equity in EECE typically represents policies and program designed with community input to meet the needs of all people, ensuring that programmatic actions and policy decisions do not deepen, but reduce, social, environmental, or economic inequalities felt across groups (n.d.). Equity-driven programs have focused on closing the gap between the existing benchmark of participation and the lowest participating group. According to powell (2022), this does two things:

1. Puts groups in competition, with the assumption being that closing the gap requires taking something from the group that is performing closest to the goal in order to give it to those who are performing furthest from the goal.
2. Assumes the group performing closest to the goal is performing well, which is rarely the case. The reality is that the individual members of the group performing closest to the goal perceive themselves as very much so in need of the support they see available to other groups who they don’t believe deserve it any more than they do.

The conversation around serving the “missing middle” in the energy industry (Hart 2026), aligned with the backlash against equity our industry has seen, illustrates the way these problems manifest in our own space. T/U presents a powerful path forward, making it the next evolution of equity, or Equity 2.0 (powell 2022). Instead of focusing on closing gaps between groups who still perceive themselves as far from their desired end state, T/U focuses on what every group needs to thrive, prosper, and achieve the universal goal.

Targeted Universalism: A Five Step Process

Targeted Universalism (T/U) offers replicable five-step policy and program development process (powell, Menendian, and Ake 2019). This section describes these steps.

Step 1: Establish a universal goal. T/U begins with recognition of a societal problem or a shared vision for the future. The recognized problem must persist for most people and communities, and it must not be solvable by existing actions. The purpose of this step is to set a universal goal in response to a collectively recognized problem or need that is measurable and inclusive of all groups. Universal goals are lofty, describing what we would want for all people. For example, eliminate food insecurity in our zip code within five years, or ensure that all people in our city have digital connectivity from their place of residence. Within energy, a universal goal might be that “all customers in our service territory live in comfortable, safe, secure energy efficient housing with utility bills that they find affordable.” Ideally, the universal goal is co-created by everyone impacted. This can be challenging, but establishing early buy-in helps create programs that are backlash resistant. The universal goal becomes the driving vision, and the program is built to ensure that all groups—regardless of how closely they are situated to the goal—receive the support they need or want to be successful in achieving the shared goal.

Step 2: Assess general population performance. Once a universal goal has been established, the next step is to collect a general performance measure for the overall population to help understand the depth and breadth of the challenge the program or policy seeks to solve. For example, if a program is trying to address energy insecurity, it might assess the percentage of the population who has missed a payment on a utility bill, chosen to forego other necessities in order to pay their energy bill, or reported lowering or raising the temperature of their home to a level that has been uncomfortable in order to maintain a utility bill they could afford. It is important to remember that this is the baseline of current performance; this step is designed to help you understand how the problem manifests across groups, not to establish a benchmark for success.

Step 3: Identify groups and places that perform differently and disaggregate data. Once an understanding of general performance has been established, the next step of T/U is to conduct a more granular assessment of how various subgroups perform relative to the goal. This might

include a more detailed demographic and/or geographic analysis to understand where there are uneven impacts on specific communities. Disaggregation, or breaking groups down into detailed subcategories such as age, gender, race, geography, or income, helps provide a more robust understanding of the kind of targeting that will be necessary in step five. For example, energy affordability can be differently concentrated in rural communities, where the lower number of customers per mile of line can drive higher costs overall (Ross, Drehobl, and Stickles 2018). Yet urban communities still experience affordability issues with different root causes and impacts. Understanding differences in experience and the different barriers to participation across groups is necessary to develop the targeted strategies to support each group in achieving the universal goal. The purpose of this step is to identify distance from the universal goal by group, not to examine or identify disparities between groups.

Step 4: Assess and understand the structures that support or impede each group. This is the most critical step of the T/U framework. Simply recognizing the different experience each group is currently having is not enough; this step requires an understanding of the structures that shape the outcomes for each group. This analysis is what enables the development of targeted strategies in the following step. Where steps two and three are about data collection and measurement, step four is focused on developing a deep understanding of *why* each group is situated where it is in relation to the universal goal. Engaging directly with the people and communities in each disaggregated group provides the best opportunity to develop this understanding and prepare to effectively engage. For example, if the goal is for residents of a certain community to live in safe neighborhoods, you might learn that some groups lack trust in police officers while others do not feel their children are safe playing in a public park based on prior experiences. Each of these groups will require different, nuanced actions to feel safe in their neighborhood, and they will know best which solutions are likely to improve their experiences. Engaging representatives from the groups you seek to serve in this step can result in more effective targeting in step five.

Step 5: Develop and implement targeted strategies. The final stage of T/U is to develop and implement targeted strategies to support each group in reaching the universal goal. This might most feel like a departure from traditional approaches to program and policy design. While many programs seek to overcome barriers, they may only implement one or two approaches that are likely to work for the largest number of people. T/U has many varied implementation strategies that take on different forms, require different resources, and support different groups and needs. Because this step may require strategic decision-making about how to allocate limited resources across different groups, it is important to make an intentional effort to involve people from those groups in decision-making. This may mean that decision makers must fundamentally change their deliberative processes, and likely necessitate deeper participation than traditional community engagement efforts (powell, Menendian, and Ake 2019).

To ensure that targeted actions actually meet the needs of each group they are designed for, T/U also includes regular and ongoing evaluation during implementation. This assessment is designed to ensure that the appropriate strategies have been implemented and, if not, allow for rapid iteration in real time to ensure needs are met. This evaluation is also best when conducted in partnership with members of the communities or groups the program intends to support.

Targeted Universalism in Practice

Targeted Universalism (T/U) is simple in theory but can become complex in practice due to the variability of potential solutions across groups, the lack of repeatability of program design, and the departure from traditional frameworks. The energy industry often looks to itself to understand how to innovate but could benefit from engaging with industries beyond its own who have already had success implementing T/U to reach greater segments of the populations they have attempted to serve. This section introduces two case studies rooted in healthcare and education to illustrate how T/U can be implemented to bring more members of a community closer to a universal goal.

Case Study 1: Vision for Baltimore

Vision for Baltimore (V4B) is a successful program implemented at Baltimore City Schools (BCS) that provides annual vision screenings for all students, accompanied, if necessary, by follow-up eye exams and eyeglasses at no cost to families (Ake 2024). The Baltimore City Health Department (BCHD) estimated that 15,000 of the 60,000 pre-k through 8th-grade students served by BCS might need glasses and experience significant barriers to getting them. Vision screenings are required for first and eighth graders in Maryland. Prior to V4B, a notification would be sent to parents or guardians alerting them that their child failed a screening and recommend that parents follow up with an eye exam. The system worked for children who did not have vision problems and for children who had vision problems and received high-quality healthcare outside of school. But for children whose parents or guardians were unable to afford access to eye care or navigate the available services for no-cost care, the approach was insufficient. While the state mandate's intent was to ensure all children in Maryland receive the vision support they need, the reality was that all communities could not achieve this goal without targeted support.

V4B emerged as a partnership between BCHD, BCS, Johns Hopkins University, nonprofit provider Vision to Learn (VTL), and Warby Parker. The program was designed to serve, with parental consent, any student who fails a vision exam on-site in VTL's mobile vision clinic. Should the child need glasses, they were able to select the style and color frames from Warby Parker, who would then deliver the glasses to students at their schools. All services are available to all students, regardless of ability to pay. Parents are not charged for participation, though the Medicaid provider of a student enrolled in Medicaid may be billed, and parents who

find themselves able to pay are invited to cover their own costs (BCHD 2026). In 2019, BCS implemented a universal consent approach, asking parents to check yes or no to initiate automatic participation in the program if their student fails an exam. By adding a checkbox to an existing form that all parents or guardians must sign, BCS simplified the process and reduced barriers to participation. After the eye exam, parents receive a letter summarizing the results and additional information around wear and care for the eyeglasses.

V4B also includes a strong focus on eyeglass usage and retention, directly addressing the stigma around wearing glasses. The program provides teachers with a list of students prescribed eyeglasses, inviting them to reward regular wear with stickers, pencils, or other small gifts. Teachers report reduced stigma, and that students are enjoying wearing their glasses. The program helps the health department achieve state-mandated universal goals that all students have the vision care they need, while also helping the school ensure students learn to the best of their ability and supporting families by providing necessary support for learning that is often cost-prohibitive.

V4B has screened over 64,000 students from 2016 to 2019, performing over 11,000 eye exams and providing over 7,900 pairs of eyeglasses. The program serviced 45 schools a year when it began. In November 2022, it received additional financial support—including a \$1 million grant from the state—to expand to serve 62 schools (Canner 2022).

Case Study 2: Chicago Public Schools Equity Framework

As the inaugural chief equity officer of Chicago Public Schools (CPS), Maurice Swinney set out to ensure that all students achieve the best possible educational outcomes with limited resources and unique challenges facing each group. Over 21 years working in public education, Swinney had seen some methods to address equity work well for some students and not others, sometimes closing gaps and other times exacerbating them. Implementing the T/U framework seemed only appropriate at CPS, where students had disparate needs across “race, gender, dis/ability, language, immigration, learning styles, enrollment period, and those with signs of trauma, among others” (Swinney 2025). Swinney worked with a group of teachers to develop a classroom-based T/U tool, which guides teachers to set goals, identify needs, and create plans for student groups unique to their classroom, school, program, or event. Designed to be used by teachers, school teams, school leaders, CBOs, and others in the CPS system, the tool is flexible enough to be applied in curriculum design, instructional strategy development, planning, program design, and advocacy (CPS Office of Equity n.d.).

Teachers move through the tool to set define success, identify the different groups and how they perform relative to the goal, and set a timeline to achieve goals and monitor progress. The CPS Office of Equity can use the tool to support district-wide resource allocation and policy change, helping to provide the support teachers need to ensure the needs of their students can be addressed. CPS relies on data to understand the level of support groups need and use this data to explain why some groups receive more support compared to others, as well as how resources are

allocated between schools within the system. But data alone is only one part of the story—CPS has found the most success in listening to young people and their families about their experiences, their needs, and what’s best for them. It’s this listening that has helped CPS build an environment where students can thrive with limited resources (Swinney 2025).

Swinney recalls a situation in which Black male students were performing very well, but Latino students were not. The school was well resourced, and the support was in place for students should they need it academically. Traditional supports were not helping Latino students thrive. Swinney invited the Latino students to have lunch and share their perspective on the challenges they were facing, as well as what they might need to see an increase in their performance. Expecting responses like bilingual instruction, or more teachers from the same background, Swinney was surprised that their sense of belonging was contributing to their disparate experiences. Most of their Black male peers had joined the school football team and established a sense of belonging and connection. Their Latino peers were feeling disconnected, as this camaraderie continued into the classroom. Latino students wanted a soccer team—the sport they felt comfortable with. Had Swinney looked only at the data, CPS would have likely invested its resources in an entirely different way and perhaps failed to address the problem. For CPS, listening has been an invaluable step in the T/U process (Swinney 2025).

Translating T/U Into Energy Program Design

These case studies illustrate what happens when organizations expand their ability to think about solutions in multi-faceted, targeted ways and see their purpose as advancing all members of their community toward a universal goal rather than mitigating barriers or closing gaps. While the sectors, institutional contexts, regulatory environments, stakeholders, resources, and outcomes differ, both case studies were initiated by a universal goal. Vision for Baltimore (V4B) made the same solution—designed for those with the most need—available to all students should parents opt in, while Chicago Public Schools (CPS) pairs data analysis with deep community listening to customize solutions to discrete problems experienced by groups of students. Together, V4B and CPS show the variability of T/U and provide examples for EECE program and policy design.

Why Energy?

Energy is a useful, and in some ways necessary, sector in which to apply T/U because of a basic mismatch in how the industry is structured. Utilities are obligated to serve everyone in their territory, but the people they serve are not equally positioned to benefit from programs designed one way for an entire service territory. A rate structure or rebate program that treats all customers the same tends to reproduce existing gaps rather than close them, simply because the starting points in housing quality, income, ability to front costs before reimbursement, even the

time it takes to schedule and sit through a home energy audit or the knowledge needed to find and navigate a program application are so different.

Recognizing that energy is a highly regulated industry and approaches must be compliant to the state, federal, and local environment in which a program or policy is implemented, T/U will require innovative and expansive thinking. The energy sector is ripe for the application of T/U for a number of reasons, including:

- Communities experience differentiated energy burdens based on their race, gender, income, age, rurality, and level of ability
- Moderate income customers are often underserved by traditional program design
- Programs designed for one or several segments of the population have been challenged federally and, in many places, at the state level

T/U is likely to help utilities, governments, and other entities who implement EECE programs or policies to reach more of their community. Doing so requires that we reframe the primary goal of energy service providers from ensuring that power is available when a customer needs to access it toward a goal that is universally beneficial for all members of the community.

Practical Steps to Implement Targeted Universalism in Program or Policy Design

These case studies illustrate the ways in which programs need to be customized to the industry, community, and context in which it is implemented. At the same time, they offer shared foundations and practical steps that can be adopted for EECE program and policy design.

Envision shared and ambitious universal goals. Programs and policies in energy often have limited goals around outputs (e.g. kilowatts, therms, or dollars saved) or promoting equal participation across customer classes. T/U invites program designers and policymakers to think more broadly, considering a shared universal goal that represents an ideal outcome¹ that all people should achieve. These goals are intentionally ambitious and designed to be inarguable. For example, consider how a program with the universal goal that every member of the community lives in a building that is energy efficient, comfortable, and safe with energy bills that feel affordable and easy to understand might differ in design from a program with the goal to save the most energy for the least cost to the utility. Consider now how simple it becomes to explain why some communities are receiving deeper investment than others when the universal goal is about comfort, safety, and affordability instead of most cost savings for least overall expense. V4B and CPS illustrate the ways in which T/U needs to be customized to the industry,

¹ An output is something that is tangible that happened because of your program or policy, while an outcome is something that is the change or improvement that a community or group experienced because of your program or policy.

community, and context in which it is being implemented at the same time offering shared foundations and practical steps that can be adopted for EECE program and policy design.

Washington's Clean Energy Transformation Act (CETA) provides an energy sector example. CETA requires an equitable distribution of the benefits from the clean energy transition for all utility customers, and requires utilities to set goals, objectives, and outcomes in collaboration with their communities, including vulnerable and highly impacted groups (WA Commerce 2026). The law doesn't dictate a single approach for every utility; it instead sets the universal destination and leaves the targeted path up to each utility's plan, which is what a universal goal is supposed to do: hold everyone to the same outcome while creating different routes to get there for each group. This then allows each utility to specify the pathways for delivering benefits that make sense within their context.

The Ameren Illinois Market Development Initiative (MDI) offers a positive example of what setting universal goals looks like at the utility level. MDI aims to foster new economic and energy efficiency opportunities for diverse and local individuals, communities, and businesses (JPI Group and Opinion Dynamics 2024). MDI aims to achieve this goal by implementing a number of targeted strategies that respond to the diverse needs of the communities and customers it serves. These include community events offering bill credits to participants, grant writing support for CBO partners, providing access to capital for small- and medium-sized diverse-owned small businesses to enable them to secure the necessary funding to grow and sustain their operations as clean energy industry service providers, internship and scholarships for folks entering—or re-entering—the workforce, and other custom approaches developed through deep listening within communities in Ameren Illinois' service territory (Ward 2025).

As these examples illustrate, ambitious universal goals are essential for establishing resilient programs; they are also an invitation to think more expansively and consider the intersectionality of the goal with other industries who may have complementary goals and communities.

Engage impacted groups in defining strategies *and* success. Both case studies show the value of engaging communities to understand what success looks like from their perspective, as well as to understand the ideal strategies with which to engage them. Data can provide a well-developed portrait of the depth of the problem, but quantitative research can only ever result in hypothesis around potential solutions. Engaging with the people and groups for whom a program is attempting to design solutions will provide the most immediately impactful solutions. Programs and policies are often designed without community engagement due to limited resources, but the reality is that the community engagement is the tool through which to determine how to best allocate limited resources and avoid rework. T/U recognizes that each community and group has its own contexts and experiences that make them experts in which solutions are viable and which are not within their community. Rather than engaging community when programs and policies are designed and their input can have minimal influence over activities and direction, program designers and policymakers should consider engaging priority groups and communities early in the process to define success and ideate on potential solutions together.

The Oregon Multifamily Energy Program (OR-MEP) offers a clear model of what this looks like in practice. OR-MEP and Oregon Housing & Community Services (OHCS) formed the OR-MEP Diversity, Equity, and Inclusion (DEI) Coalition in 2021 to improve program accessibility, with the explicit charge to recommend and influence changes to the program to make it more accessible to all, especially communities with the greatest need who have not benefitted from the program. This Coalition wasn't an advisory group brought in to react to a finished design; instead, the Coalition helped redefine the program's purpose to prioritize energy upgrades in existing and new buildings with the highest energy burden. Coalition members helped redesign the funding process itself, moving the program from a first-come-first-served model to a points-based scoring model centered on energy burden, racial and ethnic composition of the community served, and the rurality or urbanity of the community where the project is located (Abraham and Sinex 2023).

Utility integrated resource planning (IRP) is another space in which community should help define success and strategies. For example, NV Energy hosted a series of stakeholder engagement opportunities throughout the IRP planning process to develop strategies to increase the flow of benefits from the utility's energy efficiency and renewable energy programs into communities the utility has historically underserved. This included engaging directly with customers from these communities and ongoing collaboration with government offices, energy service providers, and other entities who support these communities. As part of this process, Encolor facilitated three regularly occurring working groups and conducted several focus groups made up of English- and Spanish-speaking community stakeholders to incorporate the voices from local CBOs and small businesses into the design of the next portfolio. This included conversations around appropriate metrics to assess program savings and equity impact, how to leverage federal funding, and how to invest resources in innovative new technologies and program delivery approaches (NV Energy 2024). While this exercise did not fully shift decision-making power to the community, incorporation into the planning process laid a foundation for long-term change (Parker and Dortin 2024).

Embed evaluation into your program design. One of the foundations of T/U that makes it so successful is its willingness to launch solutions early, test in market, and adapt based on feedback from the communities and groups it is deploying targeted strategies to reach. Without a pathway to collect embedded feedback, programs risk allocating resources to ineffective strategies and a potential need for rework and reengagement. Programs designed with T/U in mind have embedded evaluation practices that seek to understand whether they are achieving the intended outcome and moving communities closer to the universal goal. Ensuring your program or policy implementation plan includes early, simple, and immediate opportunities for feedback—ideally from members of targeted groups—will ensure more successful outcomes.

California's Energy Equity Indicators are a strong example of evaluation built directly into program design rather than added on afterward. The California Energy Commission

maintains Energy Equity Indicators data to help identify opportunities to improve access to clean energy technologies for low-income customers and disadvantaged communities, increase clean energy investment in those communities, and improve community resilience to grid outages and extreme events, and publishes an Energy Equity Indicators Tracking Progress Report (State of California Energy Commission 2026) that is updated periodically to monitor how state-administered clean energy programs are actually performing in low-income and disadvantaged communities. Because the indicators are tracked and reported on a recurring basis rather than assessed once at the end of a funding cycle, they show where a program is and isn't moving communities toward the universal goal while there's still time to adjust course.

Another example is the New York Clean Transportation Prizes (CTP) Initiative administered by the New York State Energy Research & Development Authority (NYSERDA), which delivered over \$85 million in 2022 to community-level projects to enhance mobility, create job opportunities, and produce other community benefits, particularly within historically disadvantaged communities. Seeking real-time feedback to inform their approach, NYSERDA contracted with Opinion Dynamics (now E Source), to conduct an embedded evaluation. The evaluation team worked closely with CTP stakeholders, NYSERDA, CTP support contractors, and individual project teams to characterize program benefits and conduct research. The outputs of the evaluation were useful in real-time to make timely, mid-course corrections, fine-tune their service offerings and recruitment strategies, and to ensure the program is responsive to community needs in real-time (Wasmund 2025). This allows the evaluation to support long-term goals, help build capacity, and to establish the data tracking infrastructure to prove impact.

Conclusion

As the energy sector faces load growth, climate impacts, and rising affordability concerns it must evolve beyond traditional program design frameworks that prioritize uniform solutions or narrowly targeted interventions. T/U offers a compelling path forward by moving the goalpost of energy programs from simply maximizing savings or closing participation gaps to ensure that all customers can achieve meaningful, shared goals. Importantly, T/U also provides a framework that is more resilient to political and social backlash. By emphasizing shared goals and ensuring that all groups receive support in targeted forms, T/U shifts the narrative away from competition over resources and toward collective progress. This is particularly relevant in a policy environment where equity initiatives are increasingly scrutinized.

Implementing T/U will require a fundamental shift in how programs are designed, delivered, and evaluated. It calls for deeper engagement with communities, more sophisticated use of data, and a willingness to test and adapt strategies in real time. This approach introduces complexity, and it creates the conditions for more effective and durable outcomes. By adopting T/U in program and policy design, EECE programs can better reach customers who have been historically underserved, improve system performance, and ensure that the benefits of the energy transition are broadly and equitably distributed.

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