From Missed Opportunities to Mission Alignment: CBOs as Energy Program Navigators

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ABSTRACT

Traditional outreach strategies, such as email outreach or online ads, often fail to reach underrepresented customers. Designing effective alternatives requires deep understanding of community-specific barriers and nuanced solutions. This paper presents findings from formative research for Xcel Energy, informing a compensated partnership model positioning community based organizations (CBOs) as trusted intermediaries conducting outreach and program navigation for customers historically difficult to reach through conventional utility channels.

Drawing on interviews with CBOs, peer utilities, and Xcel staff, plus observational fieldwork and secondary research, we identified why CBOs are uniquely positioned to bridge engagement gaps. CBOs maintain established trust within communities where utility programs may face skepticism, yet lack awareness of energy offerings and operate with constrained capacity. Our research documented missed referral opportunities and explored pathways for CBO-utility partnerships.

For underrepresented customers—particularly limited English proficiency households, renters, and immigrant communities—structural obstacles included known barriers like untranslated materials, digital access limitations, and deep mistrust of programs perceived as "too good to be true." Our research revealed how daily survival pressures create compounding barriers: customers managing multiple jobs, housing instability, or family crises lack bandwidth to discover services, determine eligibility, and navigate enrollment. Moreover, while utilities often assume energy efficiency lacks priority for these customers, CBOs consistently reported energy affordability as a top concern, highlighting critical disconnects.

This paper presents design principles for compensated utility-CBO partnerships that provide dedicated funding, training, and resources to transform CBOs into effective ambassadors. Attendees will learn how investing in CBO capacity can increase program participation by leveraging existing community trust – and engendering authentic utility credibility.

Introduction

Traditional utility outreach and enrollment models have struggled to reach customers who experience high energy burden, language barriers, housing instability, or deep mistrust of institutions (National Renewable Energy Laboratory [NREL] 2024; ACEEE 2023; Amann, Tolentino, and York 2023). Evaluations of income-qualified and equity-focused programs, including Xcel's Minnesota Low Income (LI) Segment, consistently show gaps between program availability and participation, even when financial need is acute (Evergreen Economics 2025; Bonneville Power Administration 2025). These gaps are not primarily driven by lack of interest.

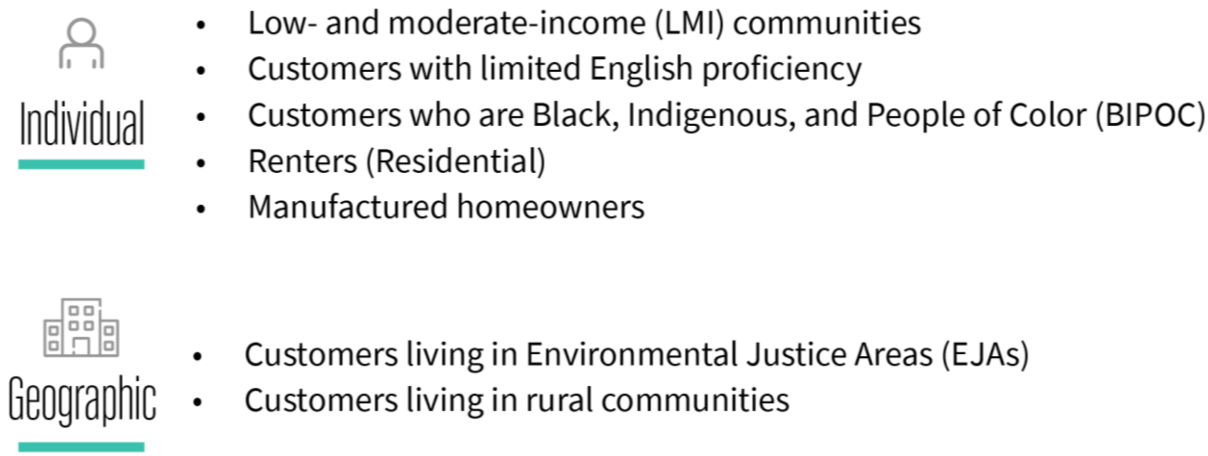
They reflect barriers tied to trust, awareness, access, and the practical burden of navigating complex processes. As noted in an ACEEE paper around equitable energy efficiency programs for underserved households: "*Inequities in providing energy efficiency services and incentives can result in disproportionate negative impacts on underserved customers. Underserved households pay their share into ratepayer-funded programs; to the extent that their homes and equipment are less efficient, they pay more into these programs relative to their household energy use… These households have not reaped commensurate energy efficiency benefits from program participation."* (Amann, Tolentino, and York 2023).

Xcel Energy had conducted formative research around the persistent barriers their low-income customers in Minnesota face to program engagement. These challenges included limited awareness of low-income programs (especially among customers with limited English proficiency), skepticism toward offers perceived as too good to be true, and constrained capacity among social service providers to support referrals (i.e., to participate in utility energy assistance or energy efficiency programs). In response, Xcel's XCELab – an incubation and innovation space for Xcel project teams to explore new concepts and test ideas – developed several future experience concepts and identified a CBO Empowerment Pilot as a viable approach. The concept is a dedicated partnership model focused on equipping community-based organizations to conduct customer outreach and provide feedback to Xcel about community needs.

While CBO-utility partnerships are not new, the depth of engagement envisioned in this pilot is different. It depends on compensated partnerships that invest in CBO capacity, train CBO staff to provide program navigation, and create feedback loops that improve program delivery over time. Xcel's design approach intentionally began with listening and learning from proposed program participants. This paper summarizes the formative research that validated and refined the pilot concept and clarified key design elements including barriers to engagement, target partners, activities and resources, and delivery elements and metrics.

Throughout this paper, we use the term "underrepresented customers" to describe the priority customer group this pilot concept seeks to serve. As displayed in Figure 1, the underlying design research leveraged two dimensions of identifiers to characterize underrepresented customers. This included both **individual identifiers** (e.g., low- and moderate-income customers, customers with limited English proficiency, Black, Indigenous, and People of Color [BIPOC] customers, renters, and manufactured homeowners) and **geographic identifiers** (e.g., customers living in Environmental Justice Areas and customers living in rural communities).

Figure 1. Underrepresented Customer Characterization



Methodology

This paper summarizes formative research to inform design considerations for Xcel's proposed CBO Empowerment Pilot. The research included two phases.

Phase 1: Discovery. The team conducted semi-structured interviews with six Xcel program staff and three implementation contractors, all responsible for administering or supporting Minnesota income-qualified or community focused programs. In parallel, the team reviewed eleven internal program and planning resources, as well as existing evaluations and relevant research. Together, these activities built foundational knowledge around current program offerings for underrepresented customers, the nature of existing Xcel-CBO relationships, and where outreach and engagement breakdowns occur.

Phase 2: Pilot Development. The team began to bring shape to the pilot concept through four methods. First, the team conducted in-depth interviews with 12 CBOs serving underrepresented customers across Minnesota, exploring missions, service models, capacity constraints, experiences working with utilities, and community barriers. The team aimed to interview both CBOs with and without an active relationship with Xcel, as identified through Phase 1 of the research. To prioritize CBOs for these interviews, the research team began by reviewing notes from Xcel staff and implementer interviews, as well as Xcel policy and program materials, including several that outlined key equity goals and existing CBO engagement. This research served as a baseline to identify Xcel's equity-related priorities and priorities for Xcel's CBO engagement:

- Advancing diversity, equity, and inclusion (DEI) through community partnerships, supplier diversity, and leadership inclusion
- Ensuring underserved communities benefit from clean energy transitions and environmental justice initiatives
- Supporting community and workforce development; and promoting sustainability through carbon reduction and renewable energy adoption.

Based on these identified priorities, the team developed four criteria to evaluate CBOs' alignment with Xcel and its priorities:

- Overlap with Xcel Energy goals as defined above,
- Prioritization of an underrepresented group as defined by Xcel2
- Focus on an Xcel identified geographic priority3
- Focus on an Xcel identified geographic priority for the CBO Empowerment pilot, the East Metro and dual fuel municipalities outside of the Minneapolis-St. Paul metro area.

Xcel staff and implementer interviews along with secondary research conducted by the research team identified 47 CBOs, prioritized by the team. The team used a snowball recruitment approach to identify additional CBOs for interviews. Following completion of the interviews the team conducted thematic analysis to identify key findings related to barriers to CBO and customer engagement, experiences with utility partnerships, and program design elements needed for participation. The team conducted an observational site visit with one CBO to build upon and confirm these insights, capture real-time interactions between staff and community members, and to identify missed referral moments and navigation challenges.

In addition to this CBO focused research, the team completed a peer utility program review, synthesizing more than 40 documents representing 13 CBO partnership programs nationwide and interviewing three peer program administrators. The team conducted secondary research to identify programs and prioritized those whose models were most like the program concept identified by Xcel. The team prioritized the most similar program concepts, based on results of the literature review, for interviews. Secondary research identified program goals and key program design elements for similar programs, while peer interviews focused on exploring lessons learned and key successes and challenges from similar programs.

The team synthesized both CBO and peer program findings to develop program design recommendations, including identifying and understanding obstacles that have made engagement with underrepresented customers – and the CBOs who serve them – difficult, and understanding elements that have made CBO-utility partnerships successful. These findings ultimately fed into a program design workshop and follow up meeting with eight Xcel staff to finalize key program delivery elements.

We outline the key methodologies associated with each phase in Table 1.

Table 1. Methodology Overview

PHASE	TASK	ACTIVITIES	TIMEFRAME
Phase 1 – Discovery	Staff & Implementer Interviews	Completed interviews with six Xcel program staff and three implementation contractors for Xcel's IQ programs in Minnesota	Summer and fall 2024
Phase 1 – Discovery	Document Review	Reviewed 11 key Xcel organizational and program resources	
Phase 2 – Pilot Development	CBO Interviews	Completed interviews with 12 CBOs serving underrepresented customers in Minnesota	Winter 2025

PHASE	TASK	ACTIVITIES	TIMEFRAME
Phase 2 – Pilot Development	Peer Program Document Review	Reviewed 40+ documents representing 13 CBO empowerment programs nationwide	Spring 2025
Phase 2 – Pilot Development	Peer Program Interviews	Conducted interviews with three peer PAs	

Current Barriers to CBO and Customer Engagement

We began development of the program design concept by identifying and naming the obstacles that have made engagement with underrepresented customers and the CBOs who serve them difficult. This section draws from Xcel staff and implementer interviews, CBO interviews, and observational fieldwork. First, we'll discuss barriers to meaningful engagement with CBOs – first from the perspective of Xcel, then from the perspective of CBOs themselves. Next, we'll summarize barriers to meaningful engagement with customers.

Barriers to CBO engagement: Xcel perspectives

Interviews with Xcel income-qualified program staff and implementation teams revealed that barriers to engaging community-based organizations tend to surface early on in the relationship, often before a partnership has meaningfully formed. These challenges are not rooted in a lack of interest among CBOs, but rather in structural dynamics that shape *how* utilities and community organizations encounter and engage with one another: *"We've tried engaging with some of our smaller organizations and I think sometimes just not having that initial contact is been an issue. You know, once you get that initial contact and they realize that you're legit, then it's easier to get in. We're not quite there yet."* (Xcel Staff 2024).

Staff consistently described a limited number of existing relationships, particularly with organizations with a mission not explicitly tied to energy, housing, or utility-adjacent work. This limits the universe of potential partners who can serve as credible intermediaries for outreach and navigation. As a result, engagement efforts often rely on limited familiar organizations, even when those organizations may not have the deepest reach into specific communities. This pattern mirrors broader industry findings that utilities tend to partner repeatedly with organizations that understand utility systems, rather than those with the strongest community relationships, which inadvertently reinforces participation gaps (Bean and McRae 2016).

Beyond the limited relationship base, staff described hesitation from CBOs when they were approached by Xcel – particularly during initial outreach. Interviewees attributed this to difficulty identifying the right entry point within organizations, uncertainty about what participation would entail, and skepticism about the legitimacy or durability of the opportunity. In some cases, outreach from Xcel was perceived as transactional or exploratory, rather than indicating longer-term commitment. Staff noted that this skepticism is not unfounded: many CBOs have prior experience with short-term pilots or unfunded asks that place burden on organizations that are already constrained, both in terms of funding and staff capacity. Research on cross-sector partnerships reinforces that early-on ambiguity around expectations, compensation, and partnership roles can undermine trust *before* collaboration begins, particularly when power imbalances are present (Bryson, Crosby, and Stone 2015).

A related challenge identified by staff was limited CBO awareness and understanding of Xcel's income-qualified offerings. Many organizations – particularly those not focused on energy – were unfamiliar with the scope of available programs or how they differed from more widely recognized bill assistance resources. Staff noted that CBO awareness tended to center on federal or state assistance programs, rather than utility-administered energy efficiency offerings. This finding aligns with prior Minnesota research and national literature showing that energy efficiency programs are less visible to social service providers than emergency assistance, in part because eligibility rules, benefits, and delivery pathways are more complex and less intuitive (Herd and Moynihan 2018). Without targeted engagement and education, staff noted that CBOs are unlikely to make referrals, even when they regularly encounter clients who could benefit from Xcel programs.

Capacity constraints cut across all these challenges. Staff repeatedly emphasized that even when interest and alignment are present, many CBOs lack the staffing, time, and operational flexibility to take on additional responsibilities without dedicated funding and hands-on support. Interviewees noted that effective engagement cannot rely on goodwill alone; it requires explicitly accounting for the labor involved in outreach, program navigation, and trust-building. From the utility perspective, this underscored the importance of designing a compensated partnership model that barriers and enables participation, rather than expecting CBOs to absorb new work within already-stretched service models.

Barriers to CBO engagement: CBO perspectives

Interviews with community-based organizations (CBOs) reinforced challenges identified by Xcel staff and clarified what makes utilities effective program and outreach partners.

CBO interviews identified persistent structural barriers that limited their ability to engage consistently with utilities. Funding mechanisms were frequently described as complex or inflexible, particularly when they failed to cover overhead, administrative effort, or the true cost of relationship-building. Several organizations emphasized that utilities often underestimate the cumulative burden placed on CBO staff, especially when partnerships rely on short-term contracts or narrowly defined deliverables. This concern aligns with recent findings from cross-sector collaboration research showing that partnerships struggle when power asymmetries are not acknowledged and when nonprofit capacity is treated as an unlimited resource rather than something that must be actively supported (Dewulf and Elbers 2018; Calò et al. 2024). CBOs also highlighted the importance of consistency and relational continuity within the utility. Many described partnerships that depended heavily on individual staff champions rather than stable institutional structures. When points of contact changed or priorities shifted, momentum stalled and trust eroded. From the CBO perspective, reliability and transparency were as important as program design.

A practical barrier surfaced repeatedly among organizations with a non-energy mission: limited awareness of utility energy efficiency offerings. Even CBOs deeply engaged in housing stability, benefits access, or financial assistance reported uncertainty about which programs existed, how eligibility worked, or when referrals were appropriate. As a result, staff often defaulted to familiar federal or state assistance programs when energy needs arose. This finding is consistent with recent research showing that fragmented information environments and high learning costs suppress program referrals and uptake unless intermediaries receive targeted, ongoing support (RMI 2022; ACEEE 2023).

Barriers to Underrepresented Customer Engagement

From the perspective of Xcel staff, challenges to engaging underrepresented customers center on trust, access, and friction created by complex processes. Interviewees described lower levels of trust among low-income and limited English proficiency customers, with program offers sometimes perceived as “too good to be true,” a dynamic amplified by recent concerns about scams: *“One of the issues that we've had is just that trust factor of getting getting our income qualified customers to. Open the doors to us and trust that they're not going to be ripped off or that it's going to be beneficial or whatever other issues come up for that group.”* (Xcel Staff 2024)

Staff also cited persistent language access gaps, including untranslated materials and technical language, as well as digital access barriers when enrollment relies heavily on online forms or documentation. Staff further emphasized limited customer bandwidth. Many underrepresented customers are managing urgent, competing priorities—housing stability, work schedules, caregiving, and interactions with multiple public systems—making program participation feel time-consuming or not worth the effort, particularly when enrollment is administratively burdensome or benefits are delayed. These findings align with research showing that learning costs and compliance requirements disproportionately suppress participation among households already under strain (Herd and Moynihan 2018).

CBO interviews reinforced these themes while grounding them in lived experience (Figure 2). Organizations described communities facing overlapping stressors, including unstable housing, transportation constraints, and the need to navigate multiple benefit systems simultaneously. For some immigrant and mixed-status families, fear related to immigration status adds risk to processes that require documentation or sharing personal information. Across organizations, common barriers included lack of trust, limited awareness of utility programs, language and cultural barriers, the digital divide, time constraints, and low perceived value when benefits are uncertain or delayed CBOs described strategies that help mitigate these barriers, including trusted messengers, one-on-one support, culturally relevant communication, and reduced reliance on digital-only outreach. Industry research similarly finds that engagement improves when intermediaries reduce participation costs and provide concrete, near-term value (Alliance to Save Energy 2020; OCPSC 2025).

Finally, CBOs highlighted a disconnect in framing. While some utility staff described energy efficiency as a lower priority, CBOs consistently described energy affordability and basic access as top concerns. Energy was rarely viewed as a stand-alone issue, but as part of a broader web of financial stability alongside rent, food, healthcare, and transportation. National research confirms that high energy burden remains concentrated among low-income households and communities of color, with significant implications for stress and financial tradeoffs (Brown et al. 2020; ACEEE 2024).

Figure 2. CBO-reported community experiences around energy

- **Energy as a dimension of financial insecurity:**
  Energy was most often talked about as a factor in overall budgeting concerns and as a driver of financial stress. It was mentioned alongside other essential needs like rent and food.

- **High utility bills:**
  The impact of high energy bills on financial health and stress were top of mind for many CBOs and their clients.

- **Overwhelm and confusion surrounding energy-related support:**
  Many community members are unaware of available support options or find the information and processes for accessing these services confusing and difficult to navigate.

Taken together, these findings underscore why CBOs play a critical role in bridging gaps between utilities and underrepresented customers. Barriers to engagement are not driven by lack of need or interest, but by trust deficits, access challenges, and the cumulative burden of navigating complex systems. CBOs are uniquely positioned to reduce these barriers by embedding energy support within trusted relationships, existing services, and the realities of customers' daily lives.

Patterns Where Effective CBO–Utility Partnerships Exist

This research was designed to move beyond documenting barriers to engagement and toward understanding the conditions under which community-based organizations (CBOs) and utilities can function as effective partners in outreach, program navigation, and learning. Drawing on interviews with Xcel staff and CBOs, peer program review, and recent industry research, several consistent patterns emerged that distinguish partnerships capable of reaching underrepresented customers in meaningful and sustainable ways.

Trust as a Prerequisite

Across CBO and peer program research, trust consistently emerged as an enabling condition for engagement rather than a downstream benefit of outreach. CBOs emphasized that trust is built through repeated, face-to-face interactions, cultural alignment, and long-standing presence in the community—conditions that utilities cannot quickly establish through program marketing alone. In communities where skepticism of institutions is common, the ability to initiate conversations about energy programs depends on credibility that is earned over time.

This finding aligns with a growing body of research showing that trusted intermediaries play a critical role in increasing participation among historically underserved populations, particularly when programs require information sharing, documentation, or follow-through over time (ACEEE 2023; Alliance to Save Energy 2020). Peer administrator interviews reinforced this dynamic, noting that partnerships were most effective when utilities engaged organizations already embedded in community service ecosystems rather than attempting to create trust through short-term outreach campaigns.

Focus on Navigation Capacity (Not Reach)

Effective partnerships were also distinguished by the role CBOs played in helping customers navigate programs, not simply by the number of people reached. High-performing partners tended to be organizations with hands-on, direct-service models—those accustomed to working one-on-one with community members to address complex needs. These organizations supported customers through eligibility questions, documentation, application processes, and troubleshooting, reducing friction that often prevents participation even when interest is high.

Both CBOs and peer program administrators emphasized that navigation work is labor-intensive and cannot be layered onto outreach expectations without dedicated support. This insight echoes research on administrative burden, which shows that learning costs, compliance requirements, and process complexity disproportionately suppress participation among households already under strain (Herd and Moynihan 2018). Programs that treated navigation as a core function—rather than an assumed add-on—were better positioned to translate outreach into enrollment and follow-through.

Mission Alignment with Community Priorities

Another defining pattern was alignment between a CBO's mission and the broader stability needs of the communities it serves. Many of the strongest potential partners identified through CBO interviews were not traditional energy organizations. Instead, they focused on housing stability, financial health, benefits access, health, or safety, and viewed energy affordability as one component of a larger web of basic needs.

CBOs consistently described energy not as a stand-alone issue, but as one of many interrelated pressures competing for attention alongside rent, food, healthcare, and transportation. National research on energy affordability reinforces this framing, showing that high energy burden remains concentrated among low-income households and communities of color and contributes to financial tradeoffs and stress (Brown et al. 2020; ACEEE 2024). Peer programs that selected partners based on this broader mission alignment—often using environmental justice mapping tools to target priority geographies—were better able to situate energy programs within lived experience rather than presenting them as isolated opportunities.

Partnership Sustainability is Dependent on Organizational Realities

While trust and mission alignment were central, peer programs also highlighted the importance of organizational readiness as a practical constraint on partnership design. Administrators consistently prioritized organizations with nonprofit status or fiscal sponsorship, not as a proxy for trust, but as a way to ensure that partners could manage contracting, reporting, and compliance requirements over time. Several programs described adopting clearer readiness criteria after encountering challenges sustaining partnerships with organizations that lacked administrative infrastructure.

This pattern reflects broader findings from public-sector partnership research, which shows that successful collaborations require both community credibility and sufficient organizational capacity to engage in formal program delivery (IEPEC 2022; EPA 2024). Programs that acknowledged this tension upfront were better able to design partnership models that were realistic for both sides.

Program Design and Delivery Considerations

Rather than prescribing a single partnership model, this research surfaced a set of design and delivery considerations that consistently shape whether CBO–utility partnerships are feasible, credible, and effective. These considerations cut across organizational context and geography, and they emerged repeatedly in staff interviews, CBO perspectives, secondary research, and our peer program review. Importantly, we frame these considerations not as administrative details to be finalized later; they are core design choices that determine how partnerships function in practice and whether they can support meaningful engagement with underrepresented customers.

The peer program literature review uncovered that across peer programs, decisions related to contract structure, funding levels, duration, and flexibility (including funding flexibility) strongly influenced the depth of engagement CBOs were able to support. Lighter-touch arrangements, which typically involved less than $50,000 CBO stipends and a one-time or short term engagement (3-12 months), tended to enable awareness-raising activities and event-based outreach. More intensive partnerships, with funding ranging from $50,000-$150,000 and contracts typically lasting one year, supported navigation, relationship-building, and structured feedback loops. CBOs consistently emphasized that expectations for engagement must be aligned with the level of resourcing and flexibility provided, particularly when partnerships are expected to reduce barriers for customers facing complex circumstances. When this alignment was missing, partnerships struggled to move beyond surface-level engagement despite strong interest on both sides.

Training and flow-of-information also emerged as critical design elements. From the perspectives of CBOs, one-time onboarding was widely viewed as insufficient in contexts where program rules evolve, eligibility nuances emerge, and staff turnover is common. CBOs expressed a clear need for ongoing training and support in order to be effective partners: *"A staff wide training on the programs and, you know, deeply understanding them. A good session where we really understand the ins and outs and how to answer any questions from our customers. We would need to know where to get information if we actually didn't know how to answer a question."* (CBO 2025)

CBOs described stronger partnerships when utilities paired outreach expectations with tangible resources and consistent follow-through. Multilingual materials, staff presence at community events, and hands-on coordination support signaled that utilities understood CBOs' role as frontline intermediaries connecting programs to communities. Several organizations noted that offering immediate, practical benefits (e.g., energy-saving items or food at events) helped legitimize utility outreach by respecting community members' time and addressing near-term needs rather than relying on future program benefits. Research on trusted-messenger models similarly finds that utility–CBO partnerships are more effective when engagement reduces participation costs and delivers concrete value (Alliance to Save Energy 2020; California Office of Community Partnerships and Strategic Communications [OCPSC] 2025).

From our peer research, programs that invested in ongoing training, regular check-ins, and accessible points of contact were better able to maintain accuracy and confidence among CBO staff over time. These structures also helped normalize questions and course correction, reducing the risk that outdated or incomplete information would undermine trust with community members. Notably, these peer programs heard similar feedback from CBO partners, requesting sustained support from program staff: *"One major component revolved around more trainings for the grassroots educators. […] More consistent support to those educators through […] trainings that we provide in weekly office hours. That was one major component to more comprehensively prepare them for their campaigns. […] It's the feedback that I received."* (Peer Utility 2025).

Reporting and measurement approaches further shaped how partnerships were experienced. CBOs and administrators alike emphasized the value of metrics that balance accountability with learning, focusing on participation outcomes, engagement quality, and feedback loops rather than detailed time tracking across multiple grants. For partnership models centered on trust and navigation, measures of customer understanding, satisfaction, and perceived accessibility were viewed as important complements to traditional participation metrics. These indicators provided insight into whether engagement approaches were reducing barriers in practice, not just generating activity.

The next phase of this work will focus on translating these considerations into specific program design and delivery choices, informed by continued collaboration with CBO partners and utility stakeholders. This includes defining the appropriate level of structure, resourcing, and flexibility needed to support navigation-oriented partnerships while maintaining accountability and learning objectives.

Conclusion

This paper presents formative research informing the design considerations for Xcel Energy's proposed CBO Empowerment Pilot. Drawing on staff and implementer interviews, CBO interviews, observational fieldwork, and a structured peer program review, the research identifies specific barriers that contribute to participation gaps and clarifies CBO partnership criteria, support needs, and delivery elements that shape feasibility.

Taken together, these research findings point to a central conclusion: improving engagement among underrepresented customers requires more than expanding outreach. It requires investing in the conditions that make engagement possible. Trust functions as an enabling condition that must be intentionally leveraged rather than assumed. Navigation work reflects real labor that must be resourced if partnerships are expected to move beyond referrals. Administrative burden is a design choice that can either reinforce or reduce participation barriers. And flexibility is not a concession, but a requirement when engagement strategies must adapt to diverse community contexts. By grounding partnership design in these principles, utilities can move toward models that not only increase participation but also strengthen program credibility and learning over time.

The findings do not constitute an implementation blueprint or an evaluation of outcomes. Rather, they provide a grounded foundation for piloting a compensated partnership model and for designing future evaluation efforts that can test whether investments in CBO capacity improve program access, customer experience, and participation among underrepresented customers.

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