

Bridging the Gap: Engaging Community-based Workers to Increase Participation in Energy Efficiency Programs

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ABSTRACT

Persistent nonparticipation in residential energy efficiency programs remains a challenge – particularly among ratepayers with the highest energy burdens, even in states with progressive policies and long-standing monetary investments. Studies of nonparticipants have identified a web of structural and relational barriers, including lack of program awareness, distrust in the implementer, language and cultural mismatches, and program complexities that prevent eligible households from engaging with available offerings. These findings highlight the need for transformational change that builds new mental models to address nonparticipation barriers.

In response, a Community of Practice (CoP) was launched in 2025 in Rhode Island, funded by a state public body and facilitated by the local land grant university. This bilingual, community-centered initiative brought together residents, community-based workers, and energy professionals to co-develop solutions through peer learning, trust-building, and adaptive facilitation.

This paper presents the CoP as a replicable framework for addressing nonparticipation through systems change. This effort led to clear and actionable recommendations for reducing enrollment friction, improving cultural competence, and strengthening feedback loops. The proposed solution includes implementation of an “energy efficiency navigator” training for community-based workers, who have well-established relationships in communities and expertise identifying and addressing social determinants of health.

The CoP centered community voices and invested in relational infrastructure to help programs move beyond transactional outreach to authentic engagement, ultimately expanding access, improving affordability, and delivering more equitable outcomes. This paper is of interest to program designers, implementers, and policymakers seeking to close participation gaps and build community-rooted strategies for energy efficiency adoption.

Background and Motivation

For over a decade, Rhode Island has maintained comprehensive and highly regarded energy efficiency portfolios, supported by robust policy commitments and rigorous oversight. At the center of this structure is the Energy Efficiency and Resource Management Council (the “Energy Efficiency Council”), a public body charged with providing strategic direction, oversight, and evaluation of utility-run energy efficiency programs. The Energy Efficiency Council’s (EEC) mission is to monitor the state’s energy efficiency programs to maximize cost-effective energy savings for all Rhode Islanders through comprehensive stakeholder representation and expert technical evaluation while supporting the state’s climate mandates and working to empower all Rhode Islanders to receive the full benefits of energy efficiency. To

deliver on its mission, the EEC has increasingly emphasized reaching households with high energy burdens and historically low participation in energy efficiency programs.

Despite Rhode Island's strong policy foundation and consistent investment in energy efficiency, participation gaps persist among renters, low- and moderate-income households, multifamily residents, and households with limited English proficiency. Evaluations have identified structural, informational, and relational barriers that prevent many eligible customers from engaging with available programs, even when offerings are available at no cost.

A program participation and multifamily census evaluation found that participation was strongly associated with higher income, homeownership, and English proficiency (Cadeo 2022). Multifamily buildings, which represent roughly 7% of residential buildings but 19% of electric accounts, exhibited particularly low participation rates. Participation in single-family audit and weatherization programs was also 2.5-5.0 times lower for income-eligible customers than for market-rate customers. The study's predictive modeling suggested that more than half of nonparticipant accounts differed substantially from current participants, indicating that existing program designs and outreach strategies are not effectively reaching large segments of the population. Another study on nonparticipant and market barriers examined why these gaps persist (Cadeo and ILLUME Advising 2022). Through surveys, interviews, and engagement with community organizations, the study found that nearly 40% of surveyed customers were unaware that energy efficiency programs existed. Participants also cited confusion about eligibility and benefits, distrust of “no-cost” services, landlord-tenant challenges, language differences, cultural mismatches, and difficulty navigating participation requirements as barriers to engagement.

Together, these studies suggest that nonparticipation is driven less by lack of interest than by structural and relational barriers that cannot be overcome through traditional marketing alone. Similar findings have been documented nationally, demonstrating that information and monetary incentives are often insufficient when customers face trust gaps, cultural and linguistic barriers, and competing life priorities (Amann, Tolentino, and York 2023).

These findings helped motivate the creation of the Efficient Housing for All Community of Practice (EHACoP). Recognizing that meaningful engagement requires building relationships, shifting mental models, and leveraging trusted messengers, the EEC funded this initiative to explore how community-based workers (CBWs) and residents could collaboratively identify persistent barriers and shape solutions. The EHACoP model responds to the evaluation evidence that program structures and outreach channels do not align with how underserved customers navigate decisions, process information, or interact with institutions. It responds to the clear recommendation – emerging across both studies – that trusted, culturally competent, community embedded intermediaries are essential to reaching nonparticipants and supporting them through the full weatherization and energy efficiency journey.

The EHACoP is not simply a new outreach effort – it is a strategic response to evaluative evidence showing that persistent participation gaps require relational infrastructure, cross sector collaboration, and community voice to meaningfully expand access to Rhode Island's energy efficiency programs. By convening residents, CBWs, health professionals, and energy practitioners, this work builds on the EEC's commitment to evaluation-driven improvement and advances Rhode Island toward a more equitable and accessible energy efficiency ecosystem.

The Efficient Housing for All Community of Practice

The EHACoP aimed to improve access to energy efficiency programs for income-eligible households in Rhode Island. Designed and facilitated by the University of Rhode Island (URI) Cooperative Extension Energy Literacy Initiative (CEELI) and funded by the EEC, the EHACoP served as an action-oriented network that identified obstacles, co-developed solutions, and enhanced program implementation through cross-sector partnerships. It was convened over six sessions from April-July 2025, bringing together residents, CBWs, public health and energy professionals, and other stakeholders.

Community of Practice Definition

The EHACoP aligns with Wenger-Trayner et al.'s (2015) definition of a Community of Practice (CoP): a group of people who share a concern and learn how to address it through regular interaction. The EHACoP provided a forum where residents, CBWs, and professionals could learn together and co-develop solutions to housing energy challenges. Through peer learning, trust-building, and dialogue, participants in a CoP become both contributors and beneficiaries of shared knowledge (Center for Positive Organizations 2020).

Mission and Purpose

The mission of EHACoP was to foster collaboration among a diverse cross-section of stakeholders to increase engagement in energy efficiency programs and thus, improve access for all. The EHACoP aimed to connect energy and health experts, community organizations, and residents to work together on improving outreach and program design for energy efficiency programming in Rhode Island. This community-driven approach is meant to ensure that program improvements are informed by on-the-ground insights and lived experiences. Ultimately, the EHACoP's purpose was to reduce obstacles to participation in energy-saving programs for income-eligible households, leveraging community input to drive more equitable and effective outcomes. It is important to note that this effort builds upon the existence of progressive energy efficiency policies and programs that seek to provide equitable access for the state's most vulnerable, invest in research to understand nonparticipation barriers, and rely on a community of practitioners working to improve the situation.

Goals

The EHACoP was guided by a logic model that identified outputs and short-term outcomes related to increasing participation in Rhode Island's income-eligible energy efficiency programs (URI CEELI 2026). The framework informed the design of activities, participant engagement strategies, and evaluation measures while supporting continuous improvement through implementation. Key outputs included establishing a CoP that brought together individuals with professional and lived experience to build relationships, diffuse power dynamics, gather feedback through surveys, develop tools, and evaluate outcomes. Additional outputs included development of a Weatherization Roadmap to guide ratepayers and CBWs through the weatherization process, empowering CBWs to support residents through increased knowledge of energy efficiency, social determinants of health, and program navigation, building awareness of

the EHACoP among professional and public audiences through reduction programming, and evaluating the effectiveness of these activities on completion of projects addressing pre-weatherization barriers and home energy efficiency. Short-term outcomes focused on increasing understanding of the benefits of energy efficiency, including reduced energy burdens and improved indoor air quality; improving familiarity with market-rate and income-eligible energy efficiency services and common weatherization deferrals in Rhode Island; and increasing understanding of the Weatherization Assistance Program application process and available funding sources.

Methodology

This section shares more information about the engagement model, content definition, adaptive learning approach, home energy assessments for participants, and a roadmap to energy efficiency guide shared with participants. To evaluate the effectiveness of this approach, we conducted a pre- and post-EHACoP survey which repeated several key questions to measure trends in increased knowledge, attitudes, and self-reported behaviors.

Engagement Model

The EHACoP adopted a multi-tiered engagement model informed by the Rockefeller Foundation's strategic convening framework (The Rockefeller Foundation 2022) to convene participants regularly and maintain active involvement. In total, six CoP meetings were held, with a deliberate mix of virtual and in-person formats to balance convenience and accessibility with the relationship-building benefits of face-to-face interaction. Each meeting was facilitated by the URI CEELI team and followed a structured agenda:

- **Knowledge Sharing:** Sessions began with facilitators or guest presenters providing relevant information to increase energy literacy (e.g., the home energy assessment process, understanding energy bills, health impacts of weatherization, etc.). These “Energy Literacy Learn” presentations addressed knowledge gaps identified in pre-surveys and were aligned with the CoP’s goals (such as improving participants’ understanding of energy efficiency programs).
- **Breakout Groups:** After the Energy Literacy Learn, meetings transitioned into interactive discussions in breakout groups during which participants were prompted to discuss obstacles, brainstorm solutions, and practice what they learned. This portion of the sessions served as an opportunity for participants to share their perspectives and learn from each other. In later sessions, participants were asked to practice using the information they had gained through the previous sessions (see *Content Definition* for the specific activities from each session).
- **Reflection:** Following the breakout group discussions, participants brought what they learned to the larger group. The reflection took different forms, including presenting posters with the information discussed, voting on other groups’ responses that resonated the most, and sharing verbal feedback about the activity. The sessions were then closed by recapping the key takeaways from the reflection, to be shared again at the start of the next session.

The EHACoP also capitalized on external community events as a form of broader engagement. One session was held in conjunction with a Rhode Island Department of Health (RIDOH) Health Equity Zone (HEZ) Learning Community event. This opened the conversation to a wider audience of CBWs and helped to disseminate information beyond the CoP.

Content Definition

The content and topics of EHACoP sessions were defined in alignment with the CoP's goals and were continually refined through input from key partners and participants. Prior to the launch of the CoP, the planning team (CEELI staff) consulted with strategic partners to shape the agenda. These partners included members of the EEC and their consultants, representatives from Rhode Island Energy (RIE), as well as professionals working at community-based or community-serving organizations like the Brown University Health Community Health Institute, Providence Public Libraries, and many of the RI Community Action Programs (CAPs). Through regular planning meetings with these key informants, the facilitators identified priority topics that the CoP should address, including: trust and communication challenges, the process of obtaining home energy upgrades, and policy feedback opportunities.

Adaptive Learning

The EHACoP embraced an adaptive learning approach that embedded evaluation throughout implementation. Facilitators collected participant feedback through surveys, attendance tracking, session discussions, and regular meetings with the EEC Education Committee. Feedback informed adjustments to subsequent sessions, including clarification of common areas of confusion and expansion of topics identified as priorities by participants and stakeholders. Input from RIE and community partners helped ensure that discussions addressed both resident experiences and key programmatic issues. This iterative approach allowed the curriculum to evolve over time and respond to emerging needs rather than relying solely on a predetermined agenda.

Witnesses

Subject matter experts (“witnesses”) from the energy, health, housing, and community organization sectors participated in EHACoP sessions as observers and resource persons. Witnesses provided expertise when needed, offered feedback to facilitators between sessions, and gained direct exposure to residents’ experiences with housing and energy challenges. Their participation strengthened cross-sector learning while helping institutional stakeholders better understand barriers identified by community members.

Home Energy Assessment Opportunity for Participants

Another aspect of the EHACoP methodology was offering participants an opportunity to receive an additional incentive for participating in the no-cost home energy assessment (HEA) program and taking advantage of weatherization upgrades (URI CEELI 2026). The purpose of this was twofold: first, as an opportunity for experiential learning (participants would better

understand the process by doing it themselves and could give feedback about the barriers they faced) and second, for immediate benefit (households could start saving energy and money).

By integrating an outside opportunity into the CoP, the organizers hoped to move from talk to tangible impact while gaining valuable feedback about the HEA process. Participants had spent time identifying potential obstacles, and this gave them a chance to experience them firsthand. All EHACoP participants were offered incentives (\$50 per step) for completing each of the following: 1) scheduling a HEA and completing a feedback survey, 2) having a HEA and completing a feedback survey, and 3) completing energy efficiency and weatherization upgrades (as well as pre-weatherization barriers, if applicable) and completing a feedback survey.

Rhode Island Energy Efficiency Roadmap & Guide

Alongside the CoP, the project team developed a draft *Roadmap to Weatherization in Rhode Island* to help residents navigate available energy efficiency and weatherization resources (URI CEELI 2026). The roadmap consolidates information about eligibility requirements, available programs, key contacts, and common pre-weatherization barriers. Participants reviewed and provided feedback on the draft throughout the CoP process, helping refine its structure and usability. The Roadmap is intended to serve as both a product of the EHACoP and a practical resource for residents, CBWs, and partner organizations seeking to support participation in energy efficiency programs.

Summary of Results

Participation

The EHACoP engaged 59 unique attendees over its six sessions. Of these, 41 were considered participants and 18 were non-participant attendees, or “witnesses.” The participants represented a diverse cross-section of stakeholders, though residents and CBWs – the target audiences identified in the logic model – made up the majority of EHACoP participants (90.2%). The EHACoP participants shared their lived experiences – stories of energy insecurity, low income, lack of familiarity with social service programs – and insights from working directly with community members in their professional capacities. The non-participant attendees were health and energy professionals who served either as facilitators and note-takers (URI staff and students) or institutional observers (such as agency representatives, subject matter experts, and program staff). The witnesses were present to contribute expertise and hear directly from community members, creating opportunities for residents and experts to engage directly.

About a third of participants preferred communications in Spanish only. All sessions provided simultaneous interpretation (either English-to-Spanish or Spanish-to-English) to accommodate the participants. The inclusion of Spanish-speaking residents was a critical aspect of making the EHACoP culturally inclusive and accessible. Attendance per session ranged from 18 to 36 participants, with an average of 28 present at each meeting. In the end, about half of the participants attended 3 or more sessions. This core group helped maintain continuity in discussions throughout the EHACoP and received monetary compensation for attending three sessions or more, which assisted with encouraging engagement and continuity.

Learning and Behavior Change

A primary learning objective of the EHACoP was to increase participants' awareness of and knowledge about energy efficiency and its connectedness to social determinants of health as a means of inspiring related behavior change on a personal and community-level. Since the sample size was small and respondents differed somewhat in the Pre- and Post- Surveys, the results should not be considered conclusive. Still, the information gleaned from the surveys has proven helpful in confirming trends observed in the qualitative evidence collected through discussion notes, feedback, and session participation. The following general trends can be drawn from the Pre- and Post- Survey results:

- **Uncertain change in knowledge and confidence:** The Pre-EHACoP and Post-EHACoP Surveys included questions aimed at assessing participants' knowledge of home energy efficiency programs and processes. For example, participants were asked how comfortable they were talking about weatherization and energy efficiency programs, as well as the purpose of a HEA, who qualifies for one, and how to sign up. The survey results didn't show much of a change in respondents' self-assessments of their abilities to discuss these topics with clients, friends and family. The average level of comfort increased slightly from 3.8/5 to 4/5, on average across the questions. The relatively small change in responses may indicate that participants became only slightly more confident in their knowledge; however, it may also demonstrate that the Pre-Survey respondents did not fully understand the amount of information that they had yet to learn. Qualitative feedback supports the latter theory. For example, in the Post-EHACoP survey, one participant wrote: *"My experience and what I have learned here has given me the knowledge and tools to teach others about how to weatherize and improve the environment of their home."*
- **Sharing knowledge with others:** The EHACoP sought to empower participants to act as ambassadors by sharing what they learned with friends, family, neighbors, or clients. In the pre-survey, only 13% of participants said they had talked to anyone about doing an energy assessment. By the end of the CoP, 75% of participants had had this type of conversation outside of the CoP. Several community health workers (CHWs) in the group mentioned that they had started incorporating energy program information into their home visits or client consultations. Likewise, some resident participants talked to family and neighbors about scheduling a HEA.
- **Increased trust in the utility:** Trust is a critical barrier to participation in energy efficiency programs. At the start of the EHACoP, baseline trust in RIE among participants was moderate to low. Several participants expressed cynicism about whether programs would truly be no-cost. The change in rating of participants' trust in the utility was from an average of 2.13 out of 5 in the pre-survey to an average of 4.06 out of 5 in the post-survey. An increase in understanding about the structure of energy efficiency programs, and hearing from a RIE representative were a few things respondents mentioned as contributing factors to this increase.
- **Early changes in personal behavior:** Although the EHACoP was held over a relatively short period of time, there were some early indications of behavior changes among participants. The Pre- and Post-EHACoP Surveys asked if participants had scheduled HEAs, and the percentage who had scheduled assessments increased from 20% to 35%.

Qualitative feedback supports this outcome, as well. For instance, one participant shared in the Post-EHACoP Survey: *“Participating in this program got me moving on addressing issues within my home.”*

Participant Feedback

During the EHACoP, participants gained knowledge through the “Energy Literacy Learn” section of the session agenda and were active contributors, offering their own recommendations for improving community engagement, program processes, and policy. This section summarizes the feedback from interactive activities, group discussions, and survey responses, particularly about how to better engage communities and improve specific program components like the HEA process and the draft Roadmap to Weatherization.

Recommendations for community engagement. One recurring theme when participants were asked about best practices for engaging underserved ratepayers was the importance of trust, cultural competence, and meeting communities “where they are.” Participants stressed that community engagement efforts must leverage trusted local organizations and social channels to be effective. Participants generated a list of channels for engagement that they believe would help make programs more accessible, approachable, and thus equitable. We categorize these channels into “general” (i.e. advertising) and “social / community-based”. Suggestions include trained community ambassadors, community events, educational institutions, word of mouth, and social media.

Participants also identified specific trusted sources of information in their communities. These ranged from local community centers and cultural associations to churches, libraries, radio stations, and events. The resulting diverse set of organizations demonstrates participants’ insight that community engagement should be woven into the fabric of existing community services and cultural networks. Rather than expecting residents to seek out programs on their own, the programs must go to where people already gather and trust. By collaborating with these existing trusted entities, program administrators can make energy efficiency programs more culturally resonant and credible in the eyes of underserved ratepayers.

Feedback on the home energy assessment process. To encourage participation in the HEAs available to low- and moderate-income ratepayers and to collect data about the process, the EHACoP offered the HEA Opportunity described in *Home Energy Assessment Opportunity for Participants*. Feedback about the assessment process was collected through a group discussion in the final CoP session, as well as through two distinct surveys: one series of surveys for those who completed the HEA Opportunity and one non-participation survey for those who did not.

The feedback has been shared with RIE, and program administrators have begun implementing some of the recommended program improvements. For instance, participants noted that the automated answering system on the income-eligible scheduling line required callers to press 1 to schedule an assessment; however, this instruction was only given in English. Once callers pressed 1, if the call was answered, a bilingual (Spanish/English) operator would answer the phone. If the call was not answered, the voicemail was also only in English. In response to this feedback, RIE immediately contacted the service provider and made the necessary changes to the automated system in order to make the process more accessible.

Feedback from HEA opportunity participants. Two out of thirty participants completed HEAs prior to the EHACoP, and provided feedback on their experiences, which included:

- **Scheduling:** There was some confusion about which entity to contact to schedule the assessment. One participant did not know if she was income eligible or not. Another participant noted that there was no description of the home assessment process on the website, leaving them with no resources to share with friends who might be interested in an audit but want to learn more about what it entails.
- **Assessment Process:** Both participants reported positive experiences during the assessment, but the feedback about assessment follow-up was mixed. One participant mentioned that they were left with some questions about their heating system that the auditor brought up but did not explain. In addition, they noted that the auditor explained what the next step should be but didn't provide any references to help facilitate and the participant would have found those to be useful to continue with the next step right away.

Feedback from HEA opportunity non-participants. Given the low level of participation in HEAs, the facilitators created a survey to systematically understand the barriers that were holding people back from scheduling an assessment, despite having an understanding of the program and being offered monetary incentives (URI CEELI 2026). Of the thirty participants, nineteen completed the survey. Of the nineteen that completed the survey, fifteen had not yet scheduled an HEA. Of the fifteen, five had tried to schedule an assessment but were unsuccessful. Survey participants were able to provide multiple responses and the reasons cited for not scheduling an HEA were:

- 32%: Pre-weatherization barriers: Knob and tube wiring (3), Mildew (2), Foundation (1)
- 21%: No follow-up from energy assessment scheduler
- 16%: Landlord or- property manager unwilling / unable to participate - relational / training
- 11%: Fear of expensive repairs needed before the home is eligible for weatherization
- 5%: Not comfortable signing the landlord contract from CAP
- 5%: Not comfortable letting strangers into my house
- 5%: Need to apply for RIE's income-eligible discount rate first
- 5%: Energy auditor cited "no work to be done"

One key takeaway from these results is that many of the barriers are structural or are perceived to be structural. In other words, people identified structural barriers, but they may not actually exist. For instance, several people mentioned that the scheduler never followed up with them. However, this may reflect a misunderstanding of the scheduling process rather than a failure of the system, as customers were expected to contact the scheduler to continue the process rather than wait to be contacted by the energy auditor. In the cases where barriers are structural, such as pre-weatherization barriers (and the lack of programs to help residents alleviate them), participants often mentioned that they didn't know how to resolve them on their own.

Rhode Island energy efficiency roadmap and guide feedback. During the final session, participants reviewed and provided feedback on the draft RI Energy Efficiency Roadmap &

Guide. All participants either agreed or strongly agreed that the tool was “helpful to navigate the weatherization process.” In addition, all but one participant agreed or strongly agreed that, with the Roadmap as a resource, they felt “confident in [their] ability to help a friend / neighbor through the weatherization process.” Participants supported the concept of having a single resource to help ratepayers through the weatherization process. Nevertheless, some recommendations emerged to improve its usability and reach, including:

- **Regular updates:** One recommendation was that the information must be kept current. Participants recognized the need for a version of the Roadmap that is updated consistently. CBWs mentioned throughout the EHACoP that out-of-date information is a common barrier for community members to access programs.
- **Accessibility:** One participant noted that the text on the Roadmap was small and difficult to read. Others suggested using a digital format to make it easier to find relevant resources at each step in the process.

Key Takeaways

To synthesize the learnings gleaned from the facilitation of these conversations with community members and CBWs, it’s useful to frame the insights in terms of a systems change model. In this model, change can be understood at three levels: structural, relational, and transformative (Kania and Rayner 2022). Structural changes involve the explicit aspects of the system: policies, practices, and resource flows. Relational changes refer to the semi-explicit aspects of the system: the relationships, connections, and power dynamics between stakeholders. Transformative changes involve the implicit aspects of the system: the mental models, beliefs, and behaviors in the community. Sustainable impact requires shifts at all three levels of the system; the key takeaways and recommendations for future investment (as outlined in *Recommendations*) were developed with this framework in mind.

Meaningful Community Engagement is not Free or Fast

The EHACoP proved that it is possible to engage income-eligible ratepayers in discussions about policy and programs, spaces where voices like these are often missing. Doing so, however, requires thoughtfulness, time, and resources. In the case of the EHACoP, it took dedicated funding to cover participant stipends, food and translation, persistent and continued outreach, and careful relationship-building to bring people to the table and keep them engaged. One of the EHAHoP participants phrased it well, noting that the community will participate “if you meet us where we are and show you’re committed.” The EHACoP’s success was built on culturally-sensitive facilitation, accessible meeting formats, and incentives that valued participants’ time. These aspects are fundamental and future efforts to involve underserved communities should include these elements. In practice, that means paying community liaisons, allowing time to develop trust, and being consistently present. The takeaway is that equitable engagement is possible, but policymakers must be willing to invest in it.

Community of Practice Best Practices

The EHACoP offers a model that can be replicated and improved. The lessons learned about logistics and content sequencing can be applied to community engagement efforts in the future. These lessons are documented in the Facilitator Workbook and this report so that others can adopt or adapt the model (URI CEELI 2026). The CoP approach can be applied to other challenges to bring community voices to the table for crucial policy conversations in Rhode Island and beyond. Investing in collaborative forums can yield actionable insights and foster a network of engaged citizens who will continue to champion the cause.

Accessibility

Participants and facilitators observed that the virtual format posed challenges: many community members were not familiar or comfortable with Zoom, some joined by phone, and few used their cameras or spoke up extensively in breakout rooms. In contrast, the in-person meetings had livelier discussions and more organic networking (some participants lingered after to continue conversations). In-person engagement was more effective for relationship-building and active participation, whereas virtual meetings, while lower cost and more convenient for some, saw lower interaction levels and required additional support to be truly inclusive (e.g., more technical orientation and facilitation tactics to draw people in).

The EHACoP also aimed to provide an accessible experience by running bilingual sessions. The sessions were facilitated in English or Spanish (the two primary languages spoken by participants), and then live interpretation was provided to ensure that everyone could participate in real time. Beyond the interpretation, this also required the translation of all session materials, which were printed so that participants could follow along with the session slides. In the EHACoP, small group activities were generally created based on language preferences and then results were translated for the rest of the group. A real-time interpreter, as well as bilingual facilitators and witnesses, are critical to ensure that the sessions are fully accessible to all participants. The CEELI team includes one bilingual staff member, which allowed for special attention to the important matter of accessibility, especially for written translation of materials, slides and phone and email communication with Spanish-speaking participants.

Knowledge, Monetary Incentives, and Community Connections weren't Enough to Inspire Action

Increased knowledge and awareness did not automatically translate into action for many participants. Despite knowing the benefits, process, and zero cost of HEAs, and being offered a monetary incentive through the HEA Opportunity, the majority of participants still had not scheduled an assessment by the end of the EHACoP. Anecdotes from data collected through the Home Energy Assessment Opportunity Non-participation Survey indicated that those who took action to try to engage in the HEA Opportunity often encountered minor hiccups that derailed their progress entirely while others didn't try at all.

Systems Change Focus for Incremental Success

Addressing the key takeaways from the EHACoP will require a holistic approach to transforming the system through which underserved communities engage with programs. The

information gathered through the EHACoP suggests that a combination of structural improvements and relational, community-driven strategies is the key to transformative change.

On the structural side, Rhode Island has made significant progress. The HEA program is one of a number of programs that support Rhode Islanders to improve the energy efficiency of their homes and businesses. These programs have been updated over time to improve their operations and reach. The dedication of the program administrators to respond to feedback is evidenced by the fact that some structural improvements have already been instituted as a result of the feedback shared by EHACoP participants.

In addition, even prior to the EHACoP process, the EEC and RIE have instituted process improvements and new initiatives aimed at equity and engagement. For example, RIE's Customer Advocate program provides direct support to ratepayers and an Equity Working Group has created a forum for discussion of energy efficiency topics. RIE has also engaged a network of libraries in underserved communities to expand their reach and to facilitate Spanish-language sessions for landlords (in parallel to English-language sessions). These efforts represent important steps toward transformative change; however, they will remain limited in scale, constrained by the resources that RIE has at their disposal and by the nature of the facilitation being done by a small team.

The combination of existing structural changes and engagement efforts have led to many Rhode Island residents being underserved by energy efficiency programs. Reaching nonparticipants will require expanding beyond the previous approach. Focusing on relational change can help to fill this gap. The EHACoP demonstrated that working through community relationships by empowering local ambassadors and partnering with trusted organizations can effectively engage harder-to-reach populations. A stronger focus on relational strategies such as these to complement structural changes can lead to transformative change and, ultimately, accelerate adoption of energy efficiency programs in Rhode Island.

The EHACoP demonstrated that, given the right support and knowledge, CBWs and residents can become effective energy efficiency ambassadors in their communities. Participants left the EHACoP feeling empowered to share information and encourage others to participate in energy efficiency programs. We heard from residents that they started coaching neighbors and from CHWs that they have integrated energy efficiency topics into their client visits. This result supports the theory that people are often more receptive to learning from someone they know and trust than from an external authority. Thus, the key to engaging with the public is to empower those trusted individuals to meet community members where they are.

Recommendations

Based on the EHACoP's outcomes and participant feedback, the CEELI team developed recommendations to improve energy efficiency program engagement, implementation, and policy. These recommendations are intended for a broad range of stakeholders, including the EEC, RIE, community organizations, and Rhode Island policymakers. They are presented in two groups: Engagement Recommendations (i.e. practical steps for program outreach and delivery) and Policy Recommendations (i.e. changes needed to address systemic barriers). The keys to increasing program uptake are to reduce friction in the process, provide hands-on assistance to homeowners, landlords and renters, and address other barriers (e.g. funding for pre-

weatherization). Most barriers cited are structural or are perceived structural barrier and with the right information, a resident could overcome these without additional structural change.

Reduce Structural Barriers to Energy Efficiency Programs

- **Simplify program enrollment:** Wherever possible, streamline the enrollment process for energy efficiency programs. For example, RIE could reduce confusion and uncertainty by creating a single unified application for both income-eligible and market rate customers. A single application would allow for marketing to be simplified, as well, since all customers could be directed to a single website or phone number.
- **Institute Follow-up Procedures:** Ensure there is a structured follow-up process for after a customer gets a HEA. Feedback collected from EHACoP participants and witnesses revealed that the immediate summary and additional follow-up provided by CAP agencies (delivering the income-eligible HEA) is not the same as that which is provided by the third-party firm delivering the market-rate HEA. Unlike many income-eligible homeowners whose HEAs are completed by resource-restricted CAP agencies, market rate homeowners benefit from having an energy auditor from a third-party firm review findings, answer questions, and discuss next steps. This support, provided in the homeowner's preferred language, is crucial to ensure that residents move forward with the weatherization process.
- **Secure (more) funding to address pre-weatherization barriers:** One of the key barriers that participants faced when considering energy efficiency upgrades for their homes was pre-weatherization barriers. Some funding has been established to help residents of certain municipalities to cover the financial burden of overcoming these barriers; however, increased funding is necessary to ensure that home weatherization is accessible to all residents.
- **Require cultural competency training for program staff and contractors:** Some participants noted that they encountered challenges when attempting to communicate with program staff. This was problematic particularly in phone communications where the operators were unable to speak the language of the caller or, in one case, they hung up because they could not understand the caller's accent. Another participant mentioned that the recommendations and instructions they received after their HEA were only provided in English. To mitigate these challenges, program staff and contractors could be required to participate in cultural competency training to give them the tools to navigate these difficult situations and provide support to residents in spite of language or cultural barriers.
- **Create feedback loops:** Establish a mechanism for customers to provide feedback on their assessment experience, both directly through auditors at the end of assessments and afterwards through online or phone surveys. To increase participation, an incentive could be linked to responses, by implementing something similar to the HEA opportunity. The feedback collected will help to identify issues for improvement, as well as aspects of the program that are working well. Specific program staff should be identified to review the responses and institute changes based on the feedback.
- **Increase the use of culturally-sensitive community engagement:** Specific resources should be dedicated to increase the reach of community engagement for energy efficiency programs. This entails both funding and partnership strategies. First, a portion of the

program marketing budget should be used for personal, Spanish-language outreach (and other relevant languages). EHACoP participants noted that they learned about the CoP when they heard interviews in their own language on a trusted radio station. In addition to being presented in their language and shared via a trusted source, engagement efforts are most effective when personalized (e.g. an interview is more likely to convince people than a paid advertisement). This means engaging through new strategies, such as partnering with social media influencers or distributing branded yard signs or window stickers to identify houses that have been weatherized. Ultimately, culturally-sensitive engagement will require further partnership with community-based organizations.

Enhanced Approach to Relationship Change

The EHACoP was an effort to convene conversations, build relationships and connections among residents, CHWs, energy and health sector professionals and facilitators. Convening the EHACoP, which was a small group relative to the nonparticipant population, illuminated the fact that despite investments in increasing participant awareness and knowledge, providing monetary incentives for participation, and cultivating personal and professional relationships did not significantly impact participation in energy efficiency programs. The barriers to participation resulted from minor hiccups in navigating the process, which were enough to stop participants from continuing when attempting to complete the process on their own. Assumptions, missed connections, and misunderstandings were the most common causes of nonparticipation among EHACoP participants.

Changing systems inherently requires shifting power dynamics from a "power over" model based on dominance to a "power with" model of collective collaboration and justice. One way to achieve this is to build collaborations that align their power use with their desired outcomes, acting as nodes for systemic transformation (Kafka 2024). Through the EHACoP, an island of coherence was created among CBWs to increase their ability to improve public health outcomes by offering training and education around weatherization as a tool. Continued investment in this type of community building can help improve program participation.

There is a unique opportunity to leverage CBWs by integrating the importance of weatherization and energy efficiency into their work vernacular. The CEELI team recommends developing a formal CBW training module on energy literacy and energy efficiency programs, which would involve creating a curriculum that covers the basics of home energy efficiency and how to navigate program referrals and includes effective communication strategies for clients who may be distrustful or uninformed about these programs. By empowering people who already work in and are trusted by the community, the lack of trust in the program will be reduced, and a greater number of low- to moderate-income residents, landlords, and tenants will be exposed to weatherization and energy efficiency through their interactions with professionals at social service and health agencies. During the EHACoP, the impact of CBWs in the community was apparent; several EHACoP participants mentioned that they came to a session because they were referred by CBWs. CBWs also reported sharing information about energy efficiency and how it relates to public health once they had a general understanding of it themselves. Formal training has the potential to scale and standardize this impact. In this model, CBWs would incorporate energy efficiency education into home visits, health workshops, and other community health interactions. In doing so, they would become "Energy Navigators." This strategy not only extends the reach of program information but also ensures that it comes from trusted messengers

already embedded in communities. To incentivize participation in the Energy Navigator training, CEELI recommends coordination between the Community Health Worker Association of RI (CHWARI), and if deemed appropriate, the RI Certification Board to institutionalize the training as a component of Community Health Worker training.

Develop an Energy Navigator Training Guide

Build upon the resources in the Facilitator Workbook (URI CEELI 2026) to create an Energy Navigator Training Guide. One of the outputs of this initiative is the wealth of materials and insights generated. This would serve two purposes: 1) offer a tool for training CBWs on energy efficiency in RI, and 2) provide a resource for other communities or organizations that want to replicate a similar community-driven engagement model. The Guide will include the session plans, agendas, slide decks, handouts, survey instruments, and summaries of activities, along with additional commentary on what worked or should be adjusted. The Guide would also detail best practices for organizing a CoP or other community engagement tools, including timelines, staffing roles, and tips for facilitation. The Energy Navigator Guide should also be made available in Spanish and Portuguese. Ideally, a webinar or workshop should be hosted to present the model and lessons to a wider audience. By documenting and sharing the EHACoP methodology, the aim is to scale up the impact of this initiative in support of the institutionalization of successful elements of the EHACoP.

Implement the Rhode Island Energy Efficiency Roadmap

Finalize and implement the RI Energy Efficiency Roadmap as a public resource and practice guide to support Energy Navigators in their role as weatherization ambassadors, using the feedback from EHACoP participants to guide its development. The Roadmap should be made accessible both online and in print, in multiple languages (at least English, Spanish, and Portuguese). There also needs to be an ongoing mechanism to keep it up-to-date and relevant. We suggest forming a small Roadmap Advisory Group that includes community representatives (perhaps even some EHACoP alumni) along with program staff. This group can meet periodically (e.g. once a year) to review the content of the Roadmap, incorporate any new programs or changes, and decide on any revisions needed. Additionally, a feature should be added to the online version (such as a “Submit an Update” form) to crowdsource updates from organizations in the field. By doing this, we ensure the Roadmap remains a living document, which was a concern participants voiced. The EEC and program administrator should also invest in promoting the Roadmap by, for example, hosting webinars to walk people through it, distributing the Roadmap via community partners (libraries, nonprofits, etc.), and integrate it into customer communications (e.g., a link or insert in energy bills). The Roadmap, as a comprehensive guide to resources and pathways, can become a cornerstone of energy-related community engagement in RI. Its success will depend on visibility and continuous improvement, hence our emphasis on a maintained feedback loop.

Conclusions

The EHACoP successfully brought together residents, CBWs, and professionals to identify barriers to energy efficiency participation in Rhode Island. Findings suggest that

increased knowledge, trust, and awareness alone may not be sufficient to drive action when structural and relational barriers remain. The experience highlights the importance of investing in trusted community networks, culturally responsive engagement, and practical navigation support. Institutionalizing the Energy Navigator model, implementing the Rhode Island Energy Efficiency Roadmap, and strengthening partnerships with community organizations offer promising pathways for increasing equitable participation in energy efficiency programs. The EHACoP provides a replicable framework for community-centered engagement that can inform similar efforts elsewhere.

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