



# Energize Connecticut

Evaluation of Educate the Workforce,  
Educate the Students, Educate the  
Public and Customer Engagement  
Initiatives

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December 10, 2021

## AGENDA

CROSSCUTTING CONCLUSIONS

INITIATIVE SPECIFIC ASSESSMENTS

EDUCATE THE WORKFORCE: TRAININGS

EDUCATE THE WORKFORCE: GREENSTEP

EDUCATE THE PUBLIC: COMMUNITY PARTNERSHIPS

CROSSCUTTING RECOMMENDATIONS

THE COOKBOOK

APPENDIX

## Our Starting Philosophy

- **Program goals should be actionable**; that is, they should focus on creating action, rather than building awareness. We recognize that building awareness and understanding may be preliminary to sparking action.
- **It is more challenging to measure the effectiveness of non-resource programs that compared to resource programs.** Designing a non-resource program requires intentional and thoughtful planning. CT is doing a great thing in making them as impactful as possible.
- Education and engagement programs **do not need to directly create savings**, but do need to lead to actions, and/or changes to behaviors and practices that may lead to savings. Education, awareness, and understanding may **be integral to other programs**, which in combination, are **cost-effective**.

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## Activities conducted across initiatives do not meet goals

### Main Findings:

- The goals of the initiatives do not align with the activities conducted
- Current activities promote understanding and awareness of energy efficiency, they need to be more focused on moving from awareness into taking actions
- Efforts lack the depth needed to effect change
- The level of expenditure of public good funds means initiatives need to show, directly or indirectly, EE behavior or practice change

(Sources: Interviews, surveys, focus groups, C&LM Plan)

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### Example: Workforce Development

#### Goals:

1. Create nationally recognized training program
2. Create and support 34,000 jobs annually

#### Activities:

Trainings are marketed toward workforce already engaged with programs (via email listserv) and currently *in* the workforce.

Trainings are designed to meet immediate needs of existing workforce; they do not reach those outside of workforce.

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(Sources: Interviews, surveys, focus groups, C&LM Plan)

### Example: Green STEP

#### Goals:

Promote a work ready clean energy workforce

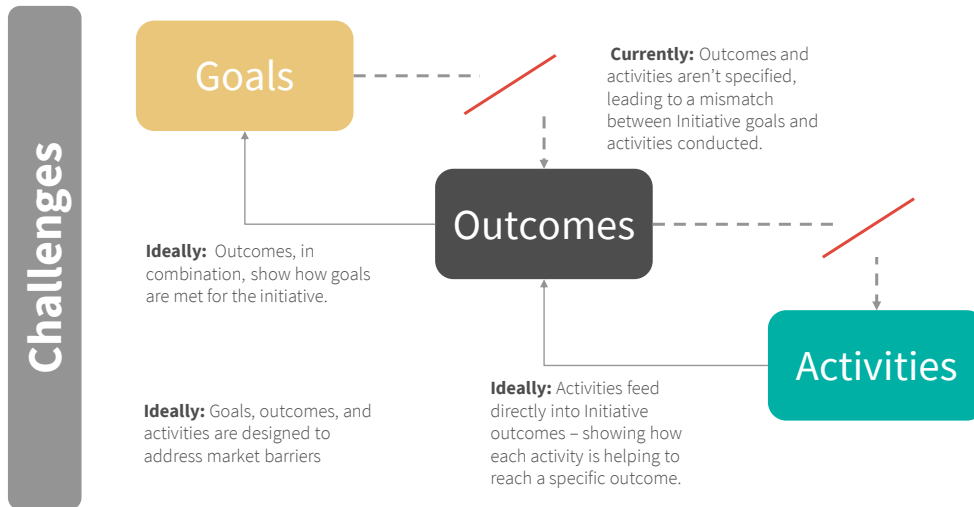
#### Actions:

Workshops on clean energy, career fairs

Technical high-schools teach many of these concepts already but do not have contacts to help students gain on-the-job experience beyond what is already offered by the current HS curriculum and/or specific to Green STEP lessons

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## Goals, Outcomes and Activities – Ideal versus reality



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Initiatives do not specify the outcomes they are trying to achieve and therefore are not designing programs that match their goals

### Main Findings:

- Initiatives cannot show how they are meeting their goals because outcomes of activities are not well-defined
- Initiatives are counting activities rather than looking at how activities create larger outcomes that meet goals.

(Sources: Interviews, surveys, focus groups, C&LM Plan)

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(Sources: Interviews, surveys, focus groups, C&LM Plan)

#### Example: Workforce Development

##### Activities

Trainings

##### Metrics

- Programs track the number of attendees.
- These counts do not show movement toward any particular outcome or goal; rather, only show that something is taking place. They cannot show whether behaviors have changed or if they foster new workers.
- The program should conduct follow-up with attendees.

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(Sources: Interviews, surveys, focus groups, C&LM Plan)

#### Example: Green STEP

##### Activities

Workshops or classroom visits; science fair  
BPI certification through GPRO

##### Metrics

- Counts numbers of workshops or classroom visits provided, number of students who participate in the science fair
- These counts do not indicate outcomes of participation in the Green STEP workshops or science fair.
- Certification is not mandatory and few students opt into it
- The overall goals of the initiative are to develop the workforce, but the activities that are being conducted do not comprehensively achieve that, instead they are a good first step in sparking interest in clean energy

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(Sources: Interviews, surveys, focus groups, C&LM Plan)

Example: eesmarts

#### Activities

Assemblies and workshops for students, professional development workshops for teachers

#### Metrics

- The number of assemblies, students at the assemblies, the number of teachers attending professional development workshops, and surveys teachers for feedback on assemblies.
- Counts show that the assemblies are happening, but do not gauge how the content is internalized by students.
- Surveys provide feedback from teachers but do not gauge what teachers and students are learning from the assemblies

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Some initiatives lack strong, action-oriented goals focused on changing behavior and practices

#### Main Findings:

- Educate the Students and Customer engagement's goals are not strong enough to justify public goods funding. It is not clear how they are integral to program cost-effectiveness.
- Educate the Workforce and Community Partnerships have strong, action-oriented goals.

(Sources: Staff interviews, C&LM Plan)

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## Some initiatives lack strong, action-oriented goals focused on changing behavior and practices

### Main Findings:

- Educate the students and customer engagement's goals are not strong enough to justify public goods funding.
- Educate the Workforce and Community partnerships have strong, action-oriented goals.

(Sources: Staff interviews, C&LM Plan)

### Example: eesmarts

#### Goals

Facilitate students' understanding of:

- EE technologies
- Renewable and non-renewable energy sources
- How electricity is generated, transmitted, and distributed

#### Activities

- Professional development workshops for teachers
- Assemblies and classroom presentations for students
- Curriculum activities
- Student Contest

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## Some initiatives lack strong, action-oriented goals focused on changing behavior and practices

### Main Findings:

- Educate the students and customer engagement's goals are not strong enough to justify public goods funding.
- Educate the Workforce and Community partnerships have strong, action-oriented goals.

(Sources: Staff interviews, C&LM Plan)

### Example: Customer Engagement – website widgets

#### Goals

Raise customer awareness of energy usage through information presented while customers are signed in to the Eversource website.

#### Assessment:

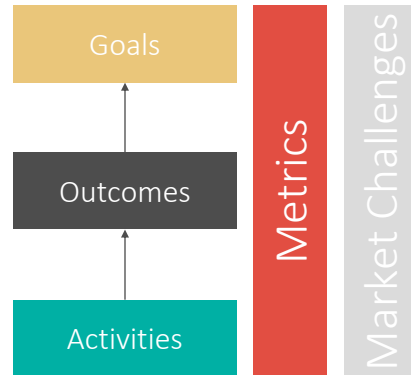
Awareness is a good first step here, but the initiative should induce behavior change on some level. For example, increase customer participation in Eversource programs. If this is an intended outcome of the initiative, progress towards that outcome needs to be tracked.

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Each Initiative needs goals, outcomes, activities, and metrics to show how it intends to overcome market challenges

Initiatives lack outcomes linking activities to goals.

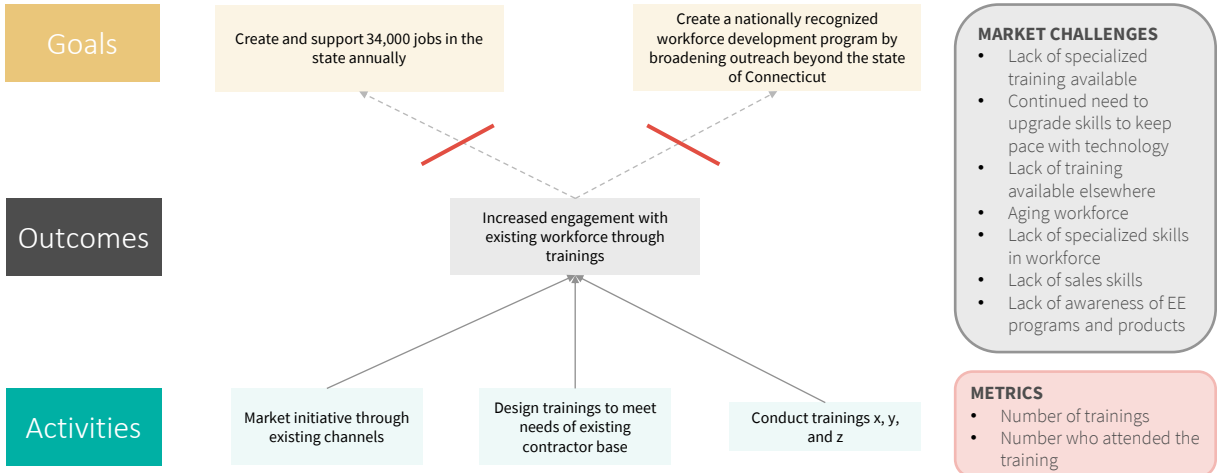
Currently, Initiatives cannot show they have achieved their goals and addressed challenges.





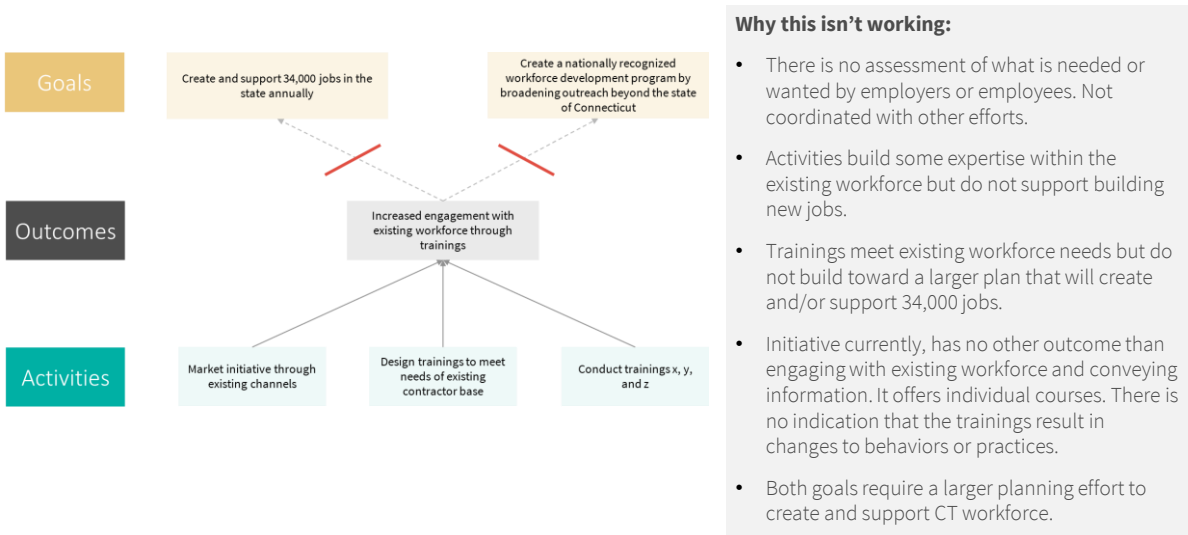
# Current workforce trainings initiative

Initiative needs to add activities and outcomes that can help achieve goals and minimize challenges

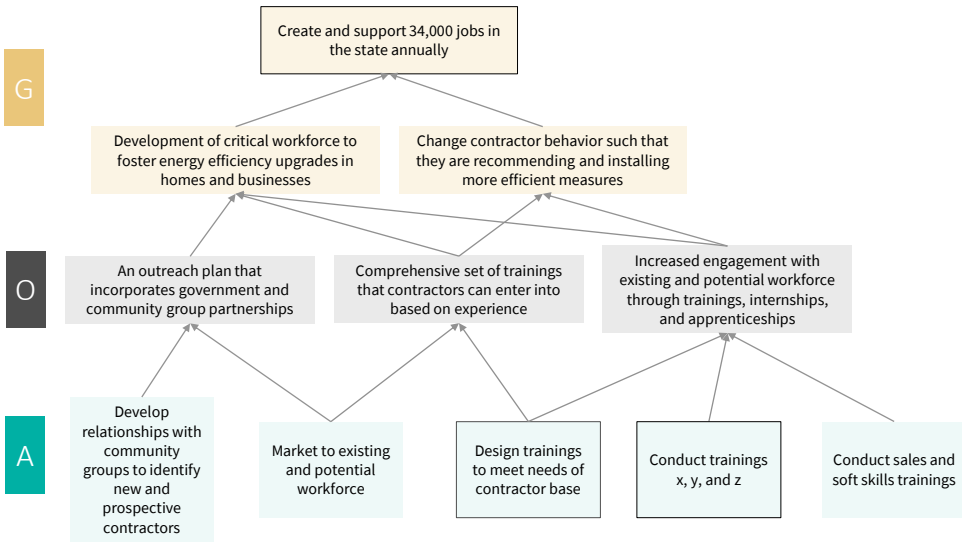


# Current workforce trainings initiative

Initiatives need to add activities and outcomes that can help achieve goals and minimize challenges



# Potential Program Revisions: Enhancing the workforce initiative

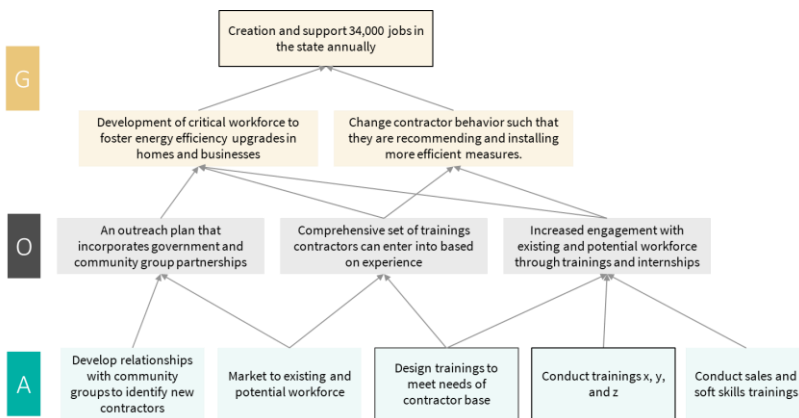


- MARKET CHALLENGES**
- Lack of specialized training available
  - Continued need to upgrade skills to keep pace with technology
  - Lack of training available elsewhere
  - Aging workforce
  - Lack of specialized skills in workforce
  - Lack of sales skills
  - Lack of awareness of EE programs and products

- EFFECTIVENESS METRICS**
- Plan covering all barriers and constant assessment of effectiveness.
  - Feedback surveys directly after training
  - Follow up surveys 6 months after trainings

## Template: Enhancing the workforce initiative

Example program focused on enhancing knowledge of the current contractor base



- What's different about this:**
- Sub-goals show how CT can achieve the larger goal of creating and supporting 34,000 jobs
  - Outcomes show how activities will build together to create a planned, comprehensive workforce development initiative
  - Activities are designed specifically to build into outcomes – including outreach outside of current listservs

## What's missing and what we recommend

### Why this isn't working:

- There is no assessment of what is needed or wanted by employers or employees. Not coordinated with other efforts.
- Activities build some expertise within the existing workforce but do not support building new jobs.
- Trainings meet existing workforce needs but do not build toward a larger plan that will create and/or support 34,000 jobs.
- Initiative currently, has no other outcome than engaging with existing workforce and conveying information. It offers individual courses. There is no indication that the trainings result in changes to behaviors or practices.
- Both goals require a larger planning effort to create and support CT workforce.

### What's different about the revised version:

- Sub-goals show how CT can achieve the larger goal of creating and supporting 34,000 jobs
- Outcomes show how activities will build together to create a planned, comprehensive workforce development initiative
- Activities are designed specifically to build into outcomes – including outreach outside of current listsevs

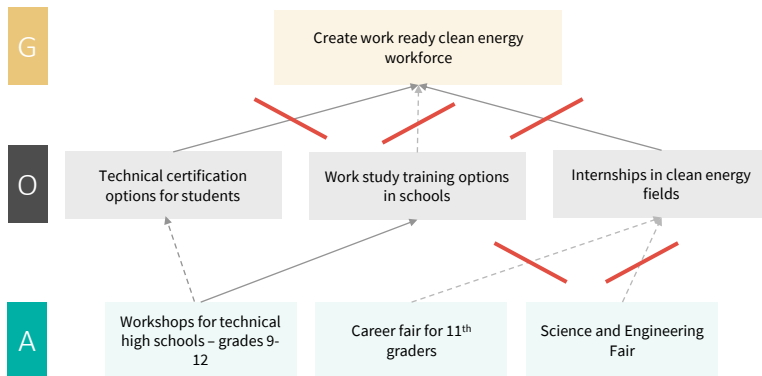
## Detailed findings from workforce development Trainings

- The program is effective at enhancing the workforce, but not expanding the workforce.
- Attendees want to network with colleagues and to learn more from program staff about program details and the future of energy efficiency in CT; several contractors interviewed noted they use trainings to directly engage with program staff and not to learn new material.
- Attendees want more information about who the course is geared towards – is it entry level or veteran?
- Attendees and trainers both said that marketing should be more widespread. Currently marketing through a trade ally email.
- Respondents are satisfied with the trainings and the trainers.
- Respondents report taking actions after the training – though the people we interviewed did not corroborate.
- The metrics that are tracked are not consistent across training and may need to be updated more often
- There are no metrics to track progress toward larger goals. There is no way to measure the impact that trainings have on behavior or practices.



## Current Green STEP initiative

Green STEP activities do not align with outcomes and goals of the initiative

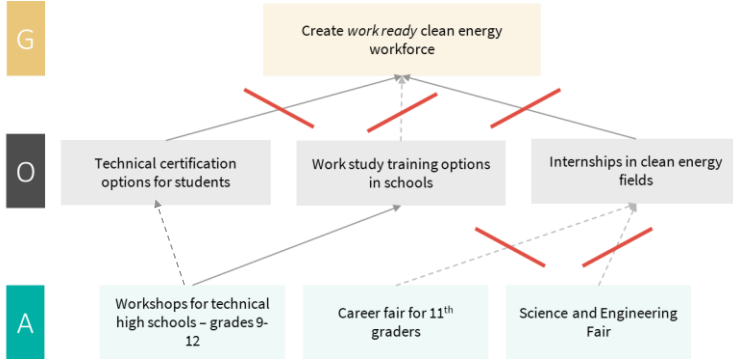


- MARKET CHALLENGES**
- Aging workforce
  - Lack of specialized skills in workforce
  - Lack of sales skills
  - Lack of pipeline from schools to existing contractor businesses
  - Lack of on-the-job training for students
  - Lack of connections between teachers and contractors

- METRICS**
- Number of students in program
  - Feedback from teachers

# Current Green STEP initiative

Green STEP activities do not align with outcomes and goals of the initiative

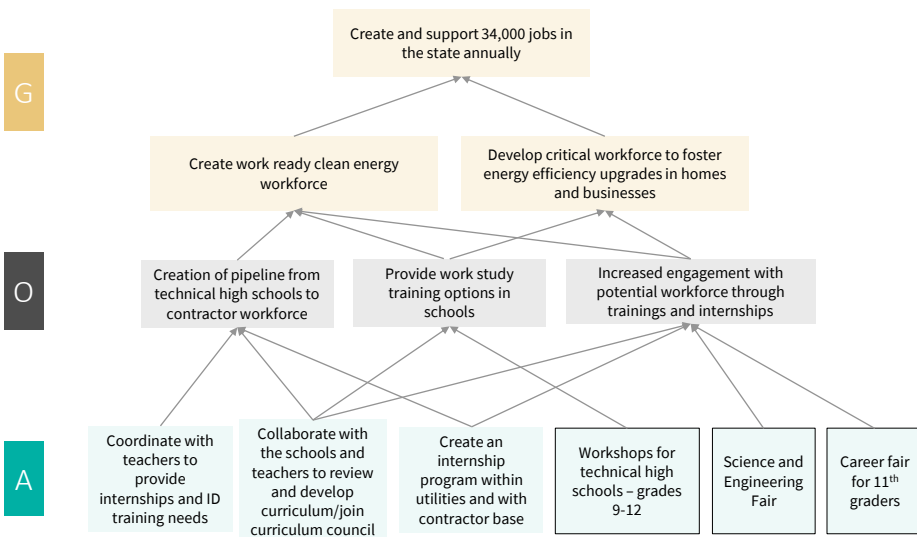


### Why this isn't working:

- Activities only weakly help students gain experience in trades
- Fairs can help link students to contractors for jobs, but there is no formal internship program
- Students may study for technical certifications if they choose to do so, but there is not a clear pipeline to support this outcome, nor jobs waiting
- The main goal requires a more comprehensive training plan and on-the-job experience

# Potential revisions to Program: Green STEP

Example program focused on expanding contractor base

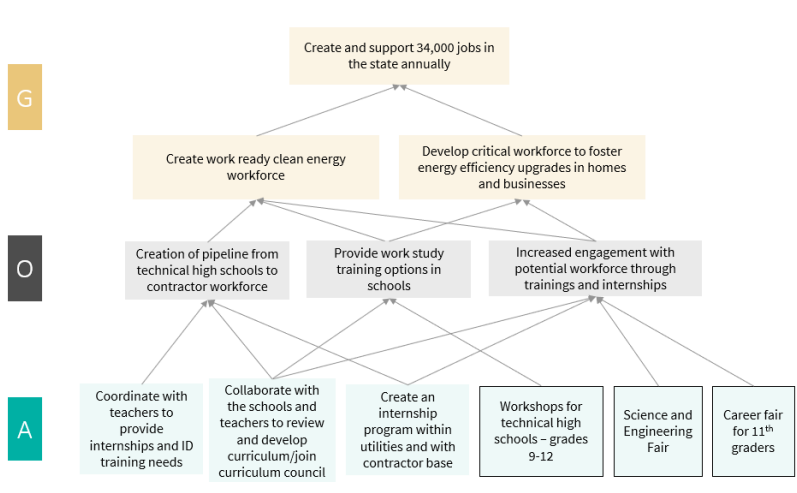


- MARKET CHALLENGES**
- Aging workforce
  - Lack of specialized skills in workforce
  - Lack of sales skills
  - Lack of pipeline from schools to existing contractor businesses
  - Lack of on-the-job training for students
  - Lack of connections between teachers and contractors

- EFFECTIVENESS METRICS**
- Feedback from teachers
  - Links from teachers to contractors
  - Increased engagement across contractor and schools
  - Number of internships, numbers hired

# Potential Revisions to Program: Green STEP

Example program focused on expanding contractor base



**What's different about this:**

- Sub-goals show how CT can achieve the larger goal of creating and supporting 34,000 jobs
- Outcomes show how activities will build together to create a pipeline from schools to contractor workforce
- Activities are designed specifically to build into outcomes – including a strong emphasis on internships or work experience

# Template: Expanding the workforce initiative

Example program focused on expanding contractor base

**Why this isn't working:**

- Activities only weakly help students gain experience in trades
- Fairs can help link students to contractors for jobs, but there is no formal internship program
- Students may study for technical certifications if they choose to do so, but there is not a clear pipeline to support this outcome, nor jobs waiting
- The main goal requires a more comprehensive training plan and on-the-job experience

**What's different about this:**

- Sub-goals show how CT can achieve the larger goal of creating and supporting 34,000 jobs
- Outcomes show how activities will build together to create a pipeline from schools to contractor workforce
- Activities are designed specifically to build into outcomes – including a strong emphasis on internships or work experience

## Detailed findings from Green STEP

- Green STEP launched shortly before the COVID-19 pandemic shut down. Many teachers didn't opt in to the programming over the past year.
- As a result, there is an opportunity to reintroduce the program to CTECs teachers.
  - Consider convening technical HS teachers for a formal kickoff, reintroduce the program; clarify the value to teachers, to school, to students.
- Many of the concepts and topics covered in Green STEP are already covered in the core curriculum, which is frequently reviewed to ensure it is aligned with needs of current employers. There is a CTECS curriculum committee that the Green STEP team may want to explore joining.
- Although certification is offered, few students opt-in to these additional certifications.
- Teachers are looking for professionals to visit classrooms to talk about what their work is and potentially conduct mock interviews with students; the utilities may want to consider creating a structure to connect implementers, trade allies, and others working in energy efficiency with high school teachers.
- CT Technical High Schools are assessed based on the number of students who go on to a university or employment in the trades. There is an opportunity to connect EE and clean energy employers with CTEC high schools.

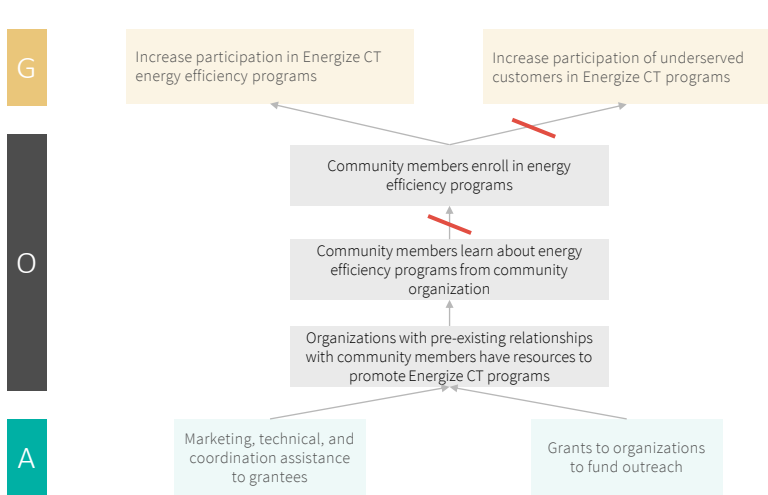
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# Current Community Partnership initiative

Summary of current situation

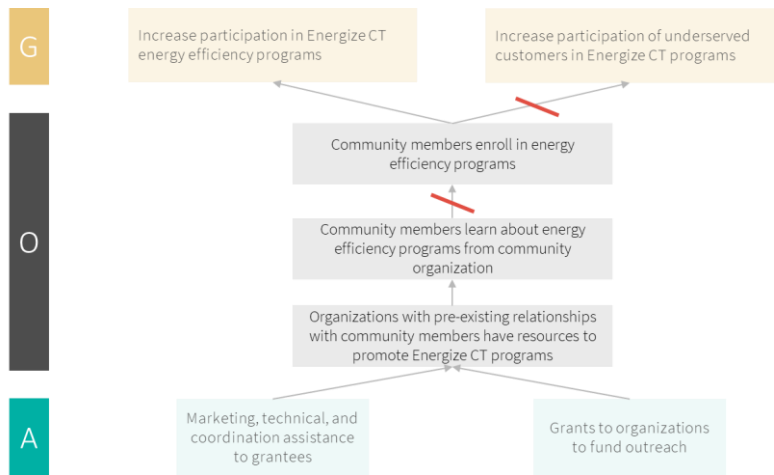


- MARKET CHALLENGES**
- Customers are not aware of Energize CT energy efficiency programs
  - Customers may not have received information on the benefits of program participation
  - Some customers may lack trust in utilities and be skeptical of utility offerings
  - Some customers may face additional barriers to enrolling in energy efficiency offerings (e.g. language, time, landlord relationship)

- METRICS**
- Participation in HES, HES-IE, Small Business, and other programs pre/post initiative

# Current Community Partnership initiative

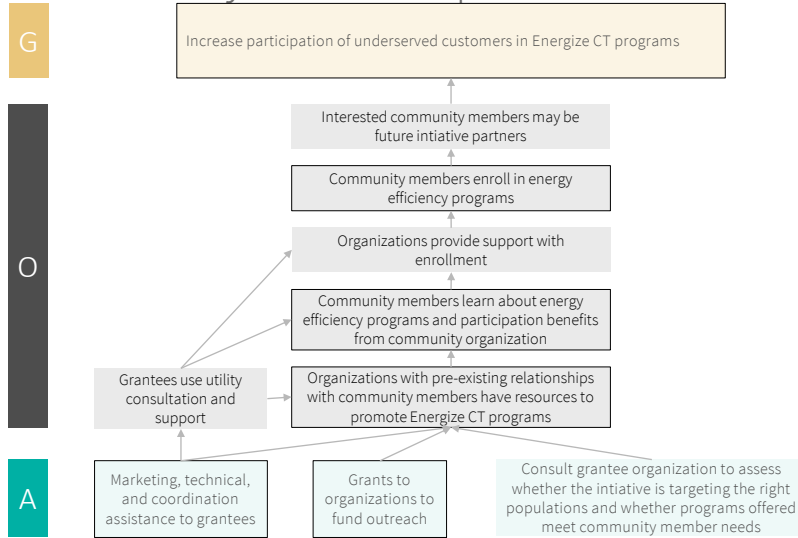
Summary of current situation



- Why this isn't working:**
- Unclear which goal is primary vs. secondary.
  - Geared toward increasing awareness of programs.
  - Other challenges may exist for customer participation and need to be identified to create the right activities and outcomes



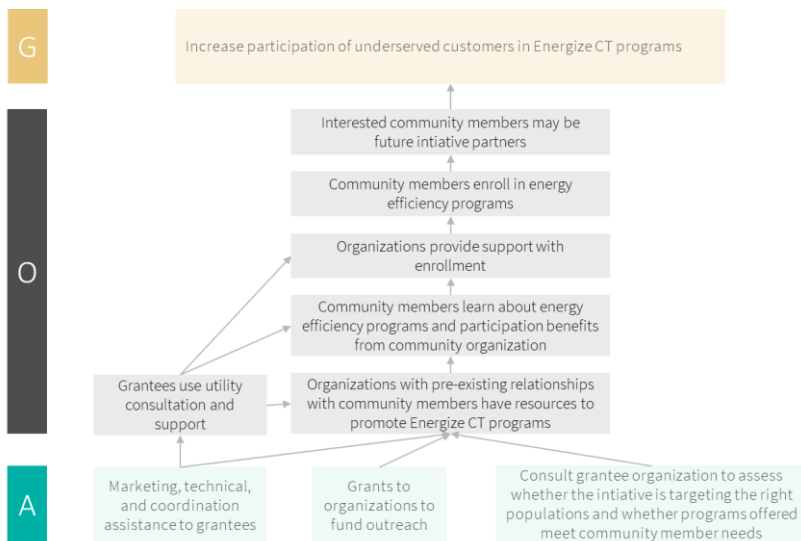
# Potential Program revisions: Community Partnership initiative



- MARKET CHALLENGES**
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  - Customers may not have received information on the benefits of program participation
  - Some customers may lack trust in utilities and be skeptical of utility offerings
  - Some customers may face additional barriers to enrolling in energy efficiency offerings (e.g. language, time, landlord relationship)

- METRICS**
- Participation in HES, HES-IE, Small Business, and other programs pre/post initiative
  - Participation by underserved customers pre/post initiative

# Potential Program Revisions: Community Partnership initiative



- What's different about this?**
- Reaching underserved customers is the key priority for the initiative, as they are less likely to enroll due to other modes of outreach
  - Grantee organizations help define what underserved communities need to be reached and the programs that will best serve them
  - Grantees help reduce challenges to program participation other than awareness
  - The initiative establishes relationships with community members who may provide input or participate in future years
  - Ongoing coordination and support

## What's missing and what we recommend

### Why this isn't working:

- Unclear which goal is primary vs. secondary.
- Geared toward increasing awareness of programs.
- Other challenges may exist for customer participation and need to be identified to create the right activities and outcomes

### What's different about the potential revisions?

- Reaching underserved customers is the key priority for the initiative, as they are less likely to enroll due to other modes of outreach
- Grantee organizations help define what underserved communities need to be reached and the programs that will best serve them
- Grantees help reduce challenges to program participation other than awareness
- The initiative establishes relationships with community members who may provide input or participate in future years
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## Detailed findings for Community Partnership

- The relative importance of the two goals is not clear. The program is currently structured to prioritize the participation goal generally, with less program support for the goal of increasing participation among underserved or underrepresented communities.
- The application and eligibility requirements emphasize municipal involvement; which impact the community groups that can apply. Community groups that are not already connected with their municipality may face larger barriers to applying.
- Recognizing the program is in its first year, we have additional evaluation activities planned for 2022.

## Initiatives and Relevance of Conclusions and Recommendations

Initiative	Activities meet goals	Outcomes described to meet goals	Strong goals linked toward behavior change	Assessment
Develop the workforce: Trainings	○	○	●	Changes to planning , outreach, and types of trainings will help attain goals
Develop the workforce: Green STEP	○	○		Program needs stronger links to existing workforce development – internships to meet goals
Educate the students: eeSmarts	○	○	○	Identify goals and assess whether the education program as is can reach those goals. Awareness building alone is not sufficient for rate payer funds
Educate the public: Customer engagement	○	○	○	If customer engagement widgets and emails can garner <u>savings</u> this program may need little changes
Educate the public: Community partnerships	●		●	Program is in its infancy but currently the goals and activities align. Outcomes need to be explicitly stated

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## Recommendations

The recommendations follow from our conclusions and provide guidance on developing goals, outcomes, and activities for each initiative.

- Describe Goals and Intended Outcomes
- Establish Clear Metrics and Tie them to Activities and Outcomes
- Energy savings, direct or indirect, are necessary
- Revisit whether the program model is operating as intended to continuously improve programs
- Annually assess the effectiveness and cost-effectiveness of each initiative; Redesign or eliminate poor performers

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## Describe Goals and Intended Outcomes

Each initiative should examine current goals and identify those the initiative wants to continue pursuing.

Next, program administrators should describe, in detail, what outcomes (resulting from the activities conducted in the Initiative) will lead to the initiative meeting those goals.

Across all initiatives, program administrators will also need to:

- Ensure goals relate to behavior change that can lead to energy savings. These can be direct or indirect. For example, workforce development can indirectly show the Initiative leads to energy savings by increasing the number of trained weatherization and HVAC technicians.
- Ensure budget allocations are sufficient to achieve goals and outcomes of the initiative.

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## Establish Clear Metrics and Tie them to Activities and Outcomes

The activities across education and engagement initiatives are extensive, but there is currently no way to demonstrate the impact they are having.

We recommend establishing consistent tracking metrics across all initiatives. The focus of assessment should be on outcomes or impacts of activities, not the activity itself.

- Workforce Development: Capture attendee information, including contact information to enable subsequent evaluation efforts
- Green STEP: Develop mechanism to remain in contact with program graduates
- eesmarts: Establish mechanisms for school-to-home connection to enable follow-up with families.
- Customer Engagement: Expand outcomes beyond engagement and incorporate metrics to capture changes to behavior.

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## Establish Clear Metrics and Tie them to Activities and Outcomes (cont.)

To elaborate how metrics can show the impact of the initiative, we provide an example below:

To check whether the workforce development initiative is designing trainings to meet the needs the of contractor base, the program will need to show they have gauged the needs of their contractors.

To show goal impacts, the program can do the following:

- Activity 1: Conduct a handful interviews with existing contractors and new entries into the workforce
  - Metric 1: Summary of needs based on interviews
  - Metric 2: Plan on how trainings meet needs articulated in interviews
- Activity 2: Show the changes to curriculum to address needs
  - Metric 2: Post-training feedback form showing changes effectively meet contractor needs

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## Energy savings, direct or indirect, are necessary\*

Initiatives funded as part of the EE programs (resource or non-resource) should be able to tie—directly or indirectly—to energy savings. To do this, the initiatives need to show how the education and engagement activities link to changes in energy behavior and/or create energy savings. For instance, a workforce development training should do more than teach about weatherization. The training should help trainees develop and implement a weatherization action plan.

Initiatives may meet other policy goals not directly related to energy savings. However, as an initiative funded through charges on customer bills, it is imperative that energy savings, even if indirect, are a result of the initiative activities. If, initiatives do not have any direct or indirect impact on energy savings then the initiative should be funded through a marketing or outreach fund, rather than through rate-payer EE dollars.

\* But this should not preclude other goals.

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## Revisit whether the program model is operating as intended to continuously improve programs

Each initiative should build in an internal continuous improvement mechanism. This will help program implementers fine-tune trainings, plans, and continuously assess the effectiveness of program activities.

For example:

1. After each training, attendees should fill out a training assessment. Program staff can follow-up with a handful of contractors 6 to 8 months after the training to see whether the training has resulted in any behavior changes.
2. About two months into an internship, interns should fill out an “internship progress report”, providing their teacher and the program with feedback on what they are learning.

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## Annually assess the effectiveness and cost-effectiveness of each initiative; Redesign or eliminate poor performers

Staff should internally assess the effectiveness of each initiative annually by reviewing progress in metrics and comparing performance and costs over time and between programs.

If initiatives, programs, or specific activities are not yielding the planned behavior and practice changes, staff should redesign the interventions or consider eliminating poor performers.

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## Develop an equitable, sustainable market

### Goal:

Create diverse workforce and programs that are responsive to the needs of all communities in CT.

How to achieve this goal:

1. Incorporate feedback from underserved and disadvantaged communities
2. Create a plan to address feedback from these communities
3. Ensure initiatives reach communities across the state.

### Example of how to do this:

Staff can see whether Spanish-language customers are excluded from programs due to low participation of in-language contractors. If so, WFD can address this by providing language assistance or some in-language training opportunities for contractors.

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## Steps

- Step 1: Identify Goals, Outcomes, Activities, Metrics
- Step 2: Check for Gaps
- Step 3: Refine and plan for activities
- Step 3: Refine and plan for activities
- Step 4: Develop Metrics
- Step 5: Implementation and continuous feedback and improvement



## Step 1: Identify Goals, Outcomes, Activities, Metrics

The initiative team should work internally and with stakeholders to outline specific goals, outcomes, activities, and metrics

### Questions to ask:

1. What are the market challenges your initiative is addressing?  
What are the most pressing challenges (either because of urgency or size)?
2. What will it take to meet that goal?
3. How will you reach those outcomes? What activities will take place to meet the outcomes?
4. How will you know when you've achieved the outcomes? How will you know when you've achieved your goal?
5. Is this doable? Why or why not?

### Answers help identify goals, outcomes, activities, metrics

1. Addressing this challenge should become your primary goal
2. These will become your outcomes, which are the building-blocks of the goal.
3. These are your activities.
4. These will become your metrics
5. This will inform your planning and identify hurdles early on.

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## Step 2: Check for Gaps

Next, the team should identify what may be missing and where the program isn't addressing market challenges

### Questions to ask:

- What are the needs of the people you're trying to serve? → These should be encompassed by the challenges and addressed by the program goals.
- How is your initiative addressing market challenges? How is it addressing the primary goal? What is missing? → what's missing can help identify opportunities for new program activities or outcomes.
- What activities is the program currently doing? What are the outcomes of those activities? Do the activities and outcomes line up with what you developed in Step 1? If not, where are there gaps?
- What goals are you working toward? Do those goals align with what you developed in Step 1? If no, how do they differ? Are there ways to close those gaps by tweaking the specific program?
- Are the goals/outcomes/activities identified in Step 1 feasible?
- If not, what do you need to make them feasible (e.g. more staff, additional funding, support from different entities at the utility or the state, etc.)

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## Step 3: Refine and plan for activities

Once the goals, outcomes, activities and metrics have been defined, the team can begin working to refine the activities and plan for new activities or new cycles of activities.

This plan should also include targets for meeting specific outcomes and associated times.

### Questions to ask:

- What do you need to do to run X activity (in terms of staff, time, budget, etc.)?
- What factors are limiting your ability to implement this activity?

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## Step 4: Develop Metrics

Planning should identify metrics as well how the program will collect the data necessary for assessing the metrics. That is, if the metric is not only attendance at a workshop but a subsequent change in practice, the program will need to ensure they have collected relevant contact information to follow up with participants later to report any changes they've made.

### Questions to ask:

- How will you know if you've achieved your goals?
- How will you measure success?
- When will you need to collect information to show progress?
- What information will you need to collect to enable subsequent information collection?

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## Step 5: Implementation and continuous feedback and improvement

With these considerations in place, begin program implementation. Consider a pilot framework to trial and test what is working or not. Incorporate feedback from implementation teams, participants, and program staff at regular intervals.

### Questions to ask:

- What worked and what didn't?
- What would you want to keep vs. change if you were to do this again?
- Where are there areas for program improvement?
- What could have gone more smoothly?

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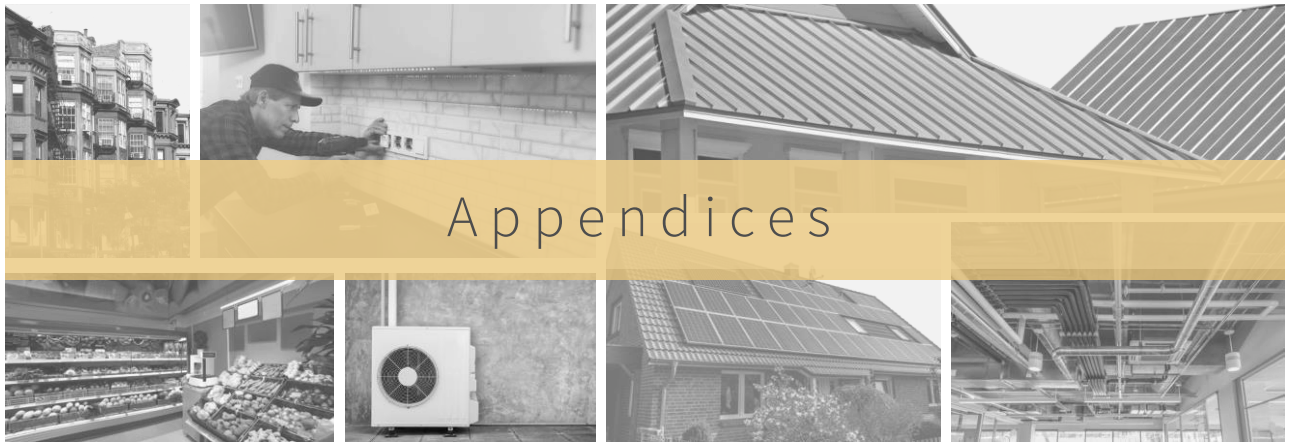
# Questions?

WE'VE GOT ANSWERS

# Contacts

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Director  
Alex@illumeadvising.com





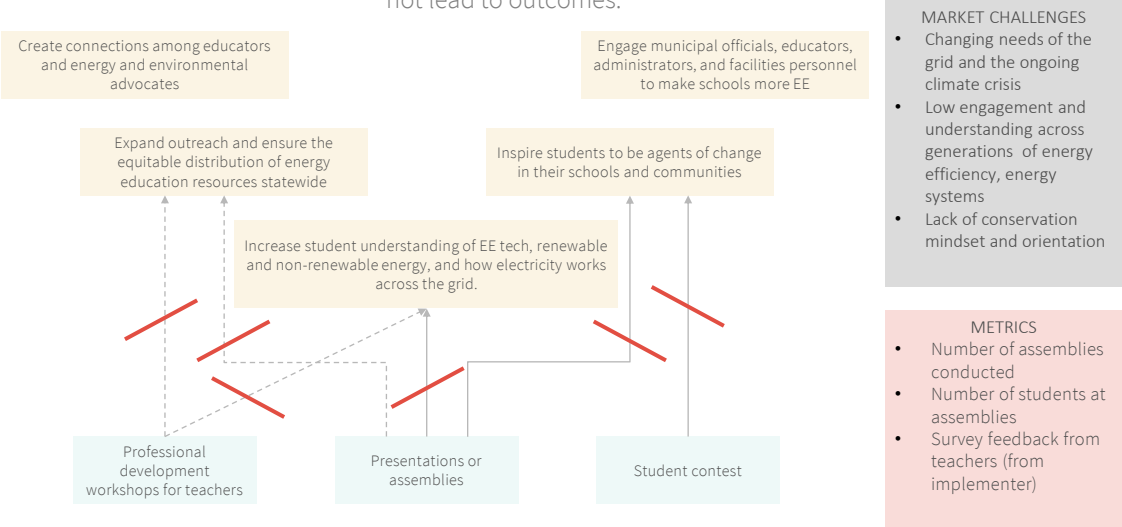
# EDUCATE THE STUDENTS: EESMARTS

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## Current eesmarts initiative

The goals of this initiative are not consistent with public good funding; activities do not lead to outcomes.

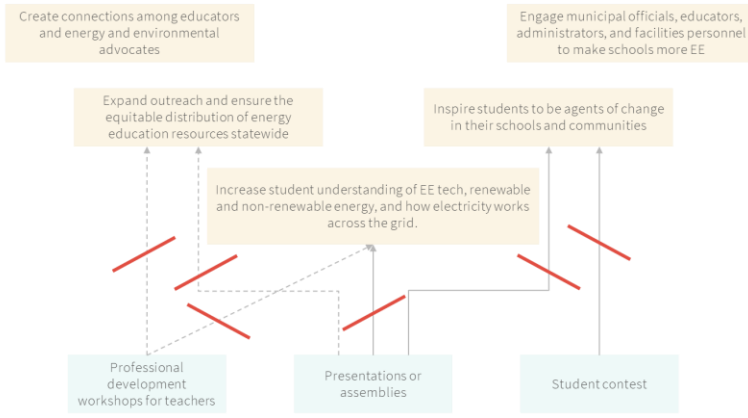
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# Current eesmarts initiative

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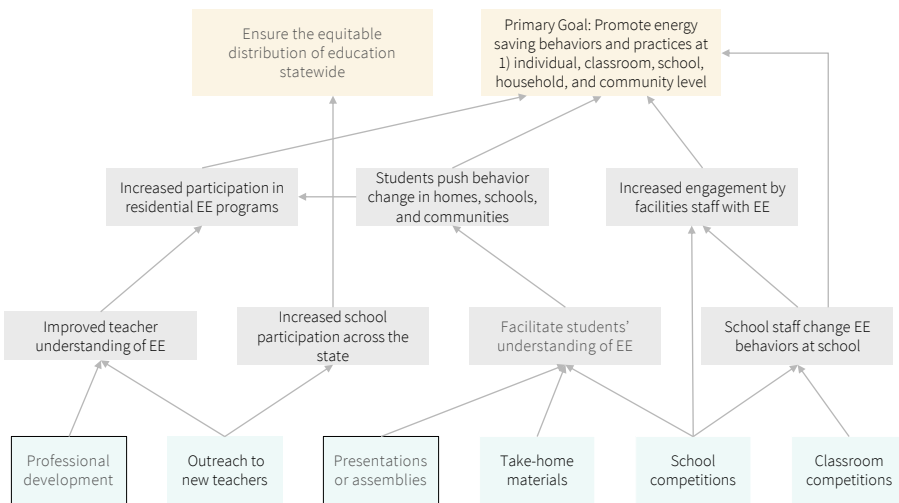
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- Why this isn't working:
- The activities being conducted do not result in outcomes
  - No outcomes linked to the goals of the program
  - Two major goals have no linked outcomes or activities
  - No metrics to show progress toward equitable distribution of EE education
  - No metrics to show progress toward engagement or behavior change goals

# Potential Program Revisions: eesmarts

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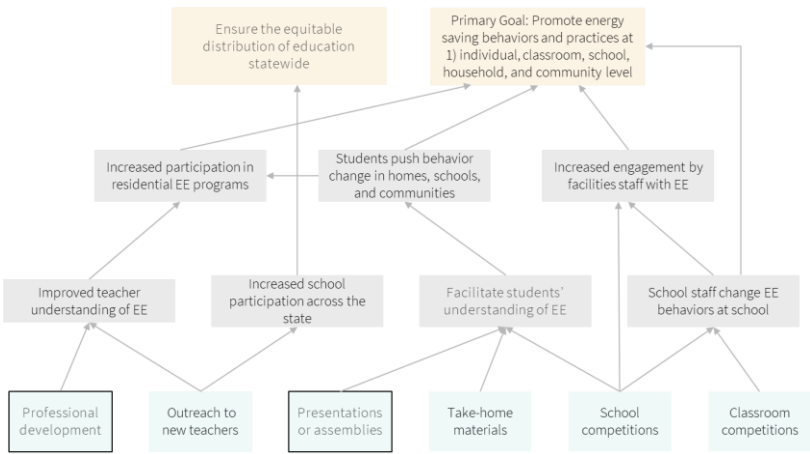


- MARKET CHALLENGES
- Changing needs of the grid and the ongoing climate crisis
  - Low engagement and understanding of EE across all ages
  - Lack of conservation mindset and orientation

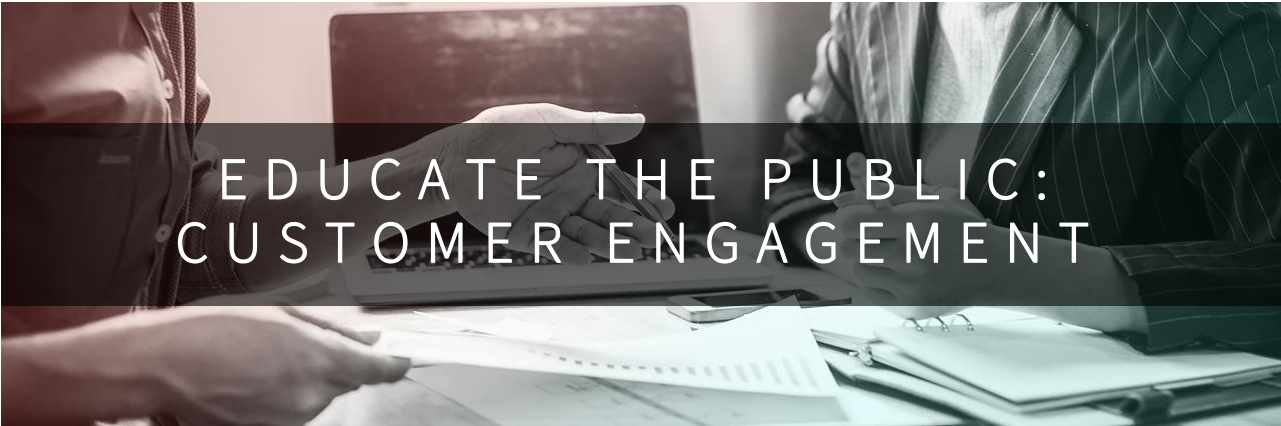
- EFFECTIVENESS METRICS
- Student and teacher surveys
  - Parent surveys
  - Facilities manager interviews
  - Meter data from competitions
  - Participation in programs from residents in participating school regions

# Potential Program Revisions : eesmart

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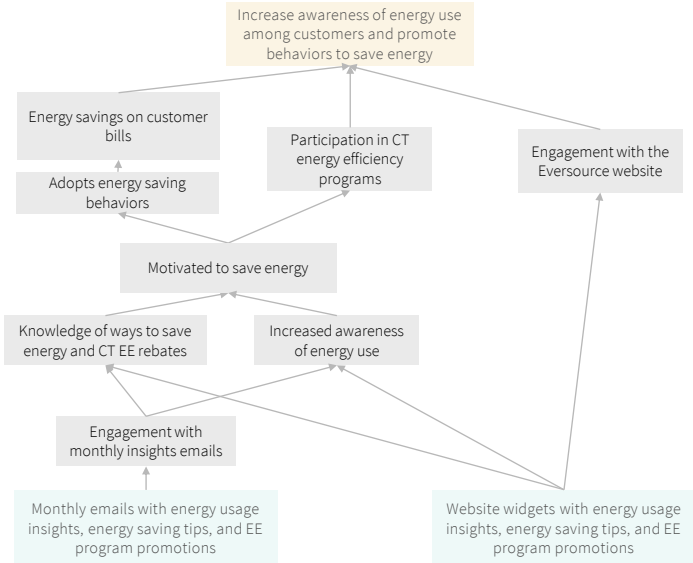


- What's different about this:
- Activities lead to clear outcomes
  - The primary goal relates to energy savings behaviors and practices
  - Outcomes support that primary goal
  - Additional activities that would expand beyond current offerings to meet the program goal
  - Assemblies and professional development activities would need to go deeper than one-time offerings



# Current Customer Engagement initiative

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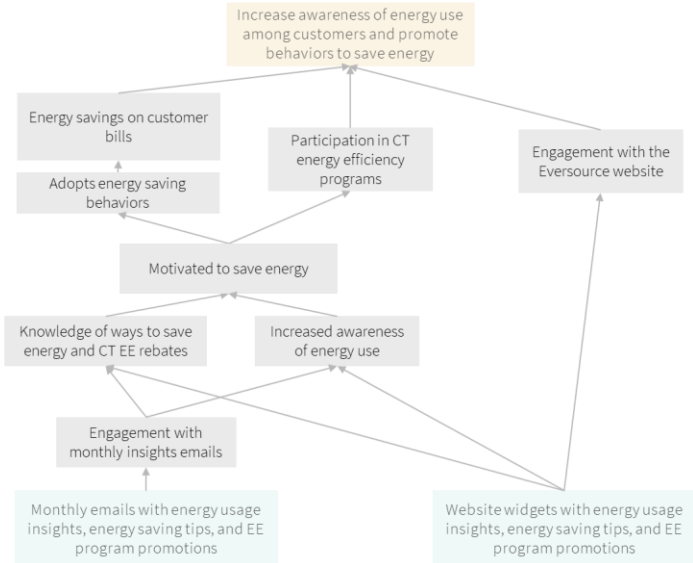


- MARKET CHALLENGES**
- Customers do not engage with energy bills and therefore have low awareness of their energy use
  - Customers may not know most impactful ways to save energy
  - Customers may not be motivated to save energy
  - Customers may not be aware of Energize CT energy efficiency offerings

- METRICS**
- View rates of widgets
  - Click through rates of widgets and emails
  - Open rates of emails
  - Behavioral energy savings (emails)

# Current Customer Engagement initiative

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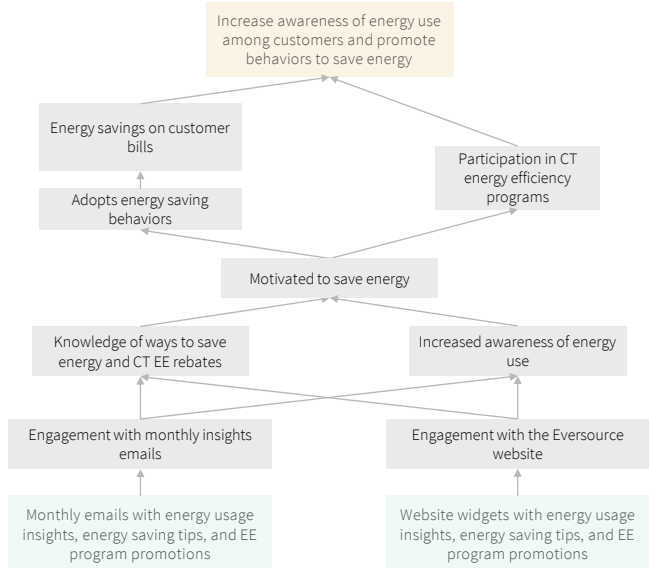
Why this isn't working:

- Lack metrics to show changes in behavior



# Template Customer Engagement initiative

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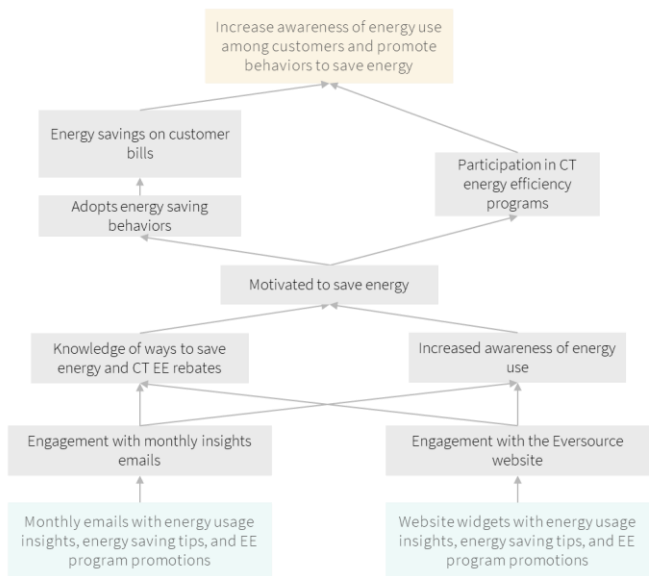


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- METRICS**
- View rates of widgets
  - Click through rates of widgets and emails
  - Open rates of emails
  - Behavioral energy savings RCT (emails)
  - Pre/post engagement behavior change survey
  - Channeling analysis to Energize CT programs

# Template Customer Engagement initiative

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- What's different about this
- Engagement is a starting outcome but not the only outcome
  - Allows for metrics and monitoring for drop off between engagement and behavior change



# Detailed Workforce Development Findings

## Best Practices



- ✓ **POST TRAINING DATA**  
Tracking progress/effect of training – how many get a new job, how many get a promotion, how many get a raise
- ✓ **COMMUNITY PARTNERSHIPS**  
Work with the community and agencies within the community
- ✓ **RECRUIT WIDELY**  
Broaden recruitment efforts (BOTH students/high schools AND existing contractors)
- ✓ **DIVERSITY**  
Diversity should be a goal of the program and diversity indicators should be tracked
- ✓ **REGIONAL NEEDS**  
Systematically review the labor market to know what positions need to be created. Learn about how the community can be best served (i.e. language, resources)
- ✓ **GOVERNMENT PARTNERSHIPS**  
Work with local and state governments as a partner to achieve their policy goals

## Trainee Survey

In June 2021 we surveyed 107 past participants of the Connecticut workforce development trainings.

Of these respondents...

- 45 took the survey for the health and safety trainings
- 62 took the survey for a non-health and safety training (technical training)

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## Actions Taken after Training

62% of respondents reported that the training had an impact on the way they work.

Of those who reported the training impacted their work, 51 took a health and safety training and 50 took a technical training.

- The products they recommend or sell
- The way they inspect their work
- The way they install products



## Workforce Enhancement

Most respondents report the training has influenced them in some way.	<p><b>65% still use the skills</b> they learned in the training</p> <p><i>76% of H&amp;S respondents say they still use the skills.</i></p>	<p><b>61%</b> think they are <b>better at their job</b> because of the training</p>	<p><b>58% completed energy efficiency projects</b> with the skills they learned in the training</p>
Some respondents are learning new skills while some are honing existing skills.	<p><b>42%</b> reported <b>sharpening an existing skill</b></p>	<p><b>32%</b> reported <b>learning a new skill</b></p>	
Some respondents reported being able to take on more complicated projects.	<p><b>45%</b> say they <b>can take on more complicated projects</b> because of the training</p>		

## Workforce Expansion

24% of respondents reported a change in employment (i.e. unemployed and got a job, promotion, switched positions within and outside of their company). Almost one quarter of trainees are reporting a substantive change in employment.

Of those, 8 (13% of technical training respondents) said the training was at least moderately important in their job change.

The most common ways that the training helped respondents get a new job or position were

- refining skills they already had (8)
- getting a certification that was required (7)
- learning a new skill (6)
- learning to describe what they were already doing in a different way (3)

Important to keep in mind how many respondents currently work for a utility.

## Workforce Development Findings

- The program is effective at enhancing the workforce, but not expanding the workforce.
- Attendees want to network with colleagues and to learn more from program staff about program details and the future of energy efficiency in CT
- Attendees want more information about who the course is geared towards – is it entry level or veteran?
- Attendees and trainees both said that marketing should be more widespread. Currently marketing through a trade ally email.
- Respondents are satisfied with the trainings and the trainers.
- Respondents report taking actions after the training – though the people we interviewed did not corroborate.
- The metrics that are tracked are not consistent across training and may need to be updated more often
- There are no metrics to track progress toward larger goals.

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## Literature Review Findings

### **General workforce development best practices:**

- understanding and adjusting to the labor market
- actively and innovatively recruiting people for trainings – especially those outside of the industry
- offering flexible training structures
- providing clear and actionable objectives about the training
- actively tracking the results and metrics to prove the program is working

### **Utility programs that are the most effective do the following:**

- collect post training data
- focus on diversity in recruiting
- partner with the government and the community to best provide solutions in the most efficient way
- and review current regional needs to ensure the program reaches them

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# Implementation considerations

## Goal 1

### **MARKET THE PROGRAMS THROUGH EXISTING AVENUES, SUCH AS THE EEB'S CALENDAR, ENERGIZE CT WEBSITE, AND TARGETED E-MAILS TO CONTRACTORS, TRADE ALLIES, VENDORS, STAKEHOLDERS, AND CUSTOMERS.**

To accomplish this goal, the Companies should consider:

- Reviewing current marketing efforts to ensure they match across channels. For example, we found the training calendar on the Energize CT website is not future looking, but instead only shows past trainings.
- Checking current email lists to understand who receives the marketing.
- Sending marketing emails to a broader audience (not just trade allies) to expand the workforce. This should occur after conducting a marketing review and creating a logic model to more clearly define the types of people the Companies would like to recruit.
- Adding in career/job profiles as part of the marketing strategy to create a more tailored marketing plan.

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# Implementation considerations

## Goal 2

### **CREATE A NATIONALLY RECOGNIZED WORKFORCE DEVELOPMENT PROGRAM BY BROADENING OUTREACH BEYOND THE STATE OF CONNECTICUT.**

- 1. CO-SPONSOR TRAINING OPPORTUNITIES WITH NATIONAL ORGANIZATIONS:** Review current co-sponsored training opportunities in Connecticut and outside of the state and assessing their effectiveness. The trainings should be analyzed for participation rates relative to other trainings, proportions of attendees coming from Connecticut vs. elsewhere, and barriers for Connecticut residents to attend the trainings. Cross-state trainings could be broadened by using virtual platforms. If the data are not currently available to analyze for these metrics, the Companies should consider adding them for future assessment of cross-state trainings.
- 2. PARTNER WITH NEIGHBORING STATE UTILITIES:** Review current partnerships with national organizations and neighboring state utilities. This will ensure that these partnerships have been created and the goals and action items are shared across entities.
- 3. PLAN IN-HOUSE TRAININGS AND CONFERENCE OPPORTUNITIES**

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# Implementation considerations

## Goal 3

### **COMMITMENT TO CREATE AND SUPPORT 34,000 JOBS IN THE STATE ANNUALLY.**

To accomplish this goal, the Companies should consider:

- Expanding marketing efforts to include people who are not currently in the industry (i.e., not trade allies or current utility employees). Jobs cannot be created if people who are not currently employed in the industry cannot find out about the Develop the Workforce initiative.
- Expanding the scope of the initiative to include internships or apprenticeships for potential employees. The Companies could partner with current trade allies or among their organizations to create jobs for potential employees. These would be intensive internships or apprenticeships where new employees would learn how to work in the industry from experts.
- Working with job agencies, career counselors, and/or high school and community college counselors to promote EE jobs. This would pair well with an internship or apprenticeship program.
- Offering an “Energy Efficiency 101” type training that is marketed exclusively to non-industry people. This training would describe the different job types, trajectory of the industry, and potential employment opportunities. There could be additional trainings offered by industry leaders on what attendees would need to do to get a job today.

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