

 **Xcel Energy**[®]

PARTNERS IN ENERGY
An Xcel Energy Community Collaboration

REACHING UNDERSERVED POPULATIONS TOOLKIT

XCEL ENERGY PARTNERS IN ENERGY AND THE ROLE OF TOOLKITS

Xcel Energy Partners in Energy provides communities in Colorado, Minnesota, and Wisconsin services to develop Energy Action Plans, along with assistance to implement those plans. Each community has its own unique energy needs and priorities, and Partners in Energy tailors its services to complement each community's vision. More and more communities now realize that energy planning plays a critical role in helping them reach their goals. The benefits of wise energy choices are diverse. By working with residents, businesses, and even in their own government facilities, a community can reduce energy and lower bills, promote renewables, drive resource conservation, and contribute toward greenhouse gas (GHG) emission reduction goals. Partners in Energy helps address the challenge of identifying local priorities and structures a path forward, leveraging all available resources. As part of this offering, we have developed several toolkits to help communities reach their energy goals.

For more information about other available toolkits or to customize any of the resources with your community's unique brand identity, contact your Partners in Energy community facilitator.

To learn more about becoming a Partners in Energy community visit XcelEnergyCommunities.com.

USING THIS TOOLKIT

Xcel Energy's Underserved Populations Toolkit will help you leverage resources to engage and communicate with underserved populations to promote energy efficiency activities. It includes a step-by-step guide on developing and implementing strategies to engage these populations.



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OVERVIEW



Overview

This toolkit is intended for communities wishing to provide energy efficiency and cost-saving measures to underserved populations. Many Partners in Energy communities have dedicated staff and networks of nonprofit organizations and agencies focused on underserved populations. This toolkit seeks to develop opportunities to integrate existing community efforts for underserved populations into Partners in Energy implementation activities. It provides a step-by-step process for identifying existing resources, developing, and implementing strategies, and conducting outreach.

WHO ARE OUR UNDERSERVED POPULATIONS?

Communities and people who are underserved face systemic and institutional barriers which prevent them from accessing and/or receiving the same quality of services as people not facing the same barriers. These barriers may be economic, cultural, and linguistic and may be discriminatory in areas such as racism, ageism and ableism. Examples of underserved populations and associated barriers are provided in the table below. Note that this is not a comprehensive list of underserved populations or potential barriers.

Underserved Population	Potential Barriers
Persons with Physical Disability	<ul style="list-style-type: none"> • Limited ability to install upgrades • Limited ability to read website, watch videos, or read print material that is not accessible to blind and deaf users
English as a Second Language	<ul style="list-style-type: none"> • Lack of outreach materials in their primary language • Lack of program instructions online or by phone in their primary language • Lack of energy-related information through preferred communication networks
Low-Income Households	<ul style="list-style-type: none"> • Lack the capital to make improvements • Lack of credit options to finance improvements • Older homes that require health and safety upgrades (e.g., asbestos) before energy upgrades can be implemented
Racial/Ethnic Minorities	<ul style="list-style-type: none"> • Discrimination leading to distrust in government and utilities • Lack of energy-related information through preferred communication networks
Renters	<ul style="list-style-type: none"> • Lack of property rights to install energy upgrades • Lack of cost savings from energy improvements if utilities are not billed separately by usage
Seniors	<ul style="list-style-type: none"> • Limited technology knowledge/access – cannot sign up online for programs • Limited physical ability to install upgrades

TOOLKIT PROCESS

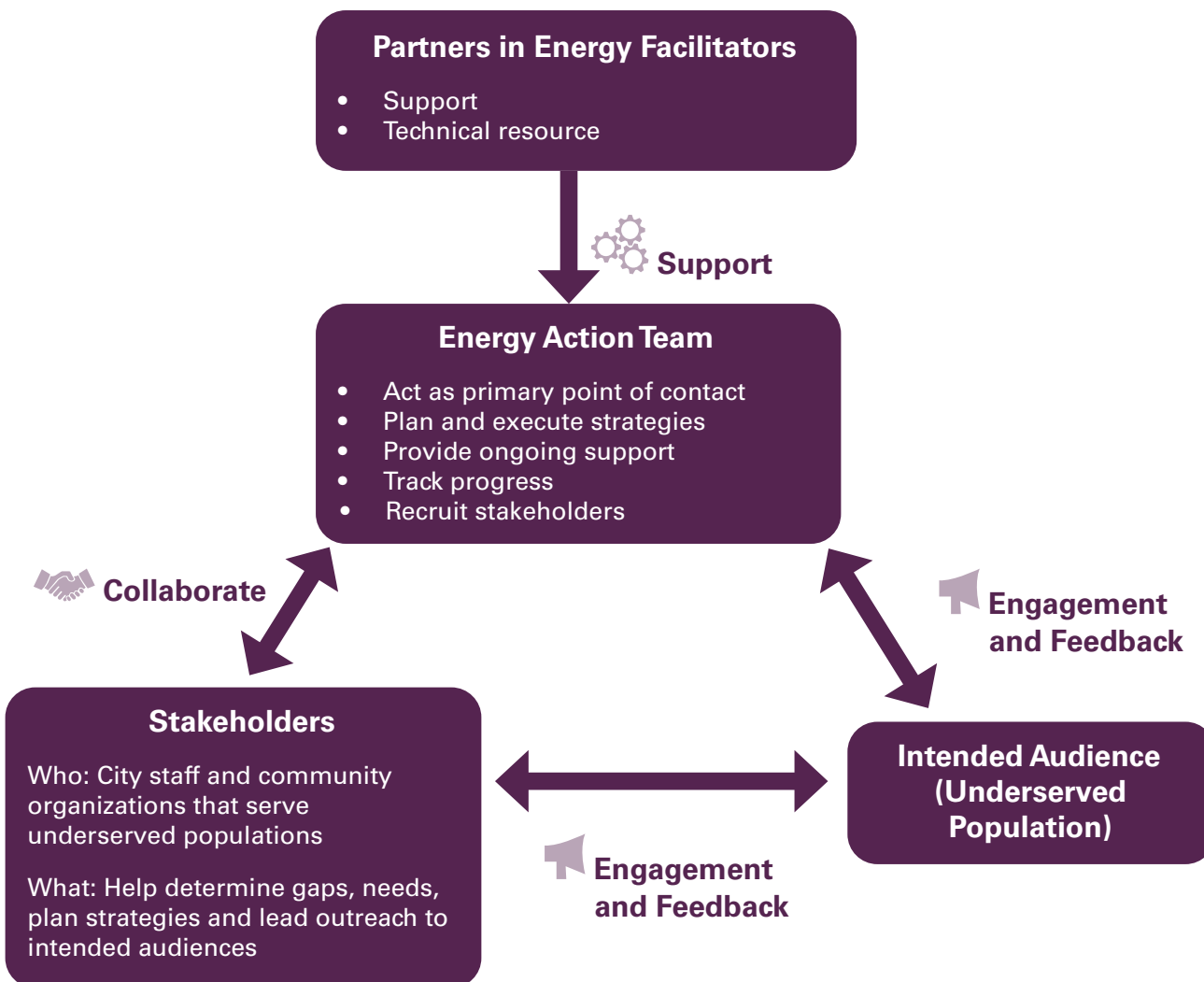
Once the Energy Action Team has identified underserved populations as a focus area, it's important to build strategies for addressing community identified needs by working with partner organizations and conducting outreach. The toolkit will guide users through determining the most pressing gaps and needs for these households through the following steps:



This process can be iterative or concurrent as needed. It is designed to provide a guideline for planning your community's initiative and should be customized to best serve your needs.

Underserved Organizational Chart

There are many potential stakeholder groups involved in the process outlined below. To better understand each of these groups, their roles and responsibilities are outlined below:



GUIDE TO REACHING UNDERSERVED POPULATIONS



Guide to Reaching Underserved Populations

ONGOING: IDENTIFY & ENGAGE STAKEHOLDERS

Stakeholder engagement should occur throughout the entire strategy planning and implementation process. In addition to helping implement your strategy, stakeholders can help identify community needs and provide valuable input on the types of underserved populations in your community. Community engagement efforts will be most effective when you and your stakeholders have a strong collective knowledge of your intended audience and existing resources to leverage.

Stakeholders should include a range of representatives from non-profit organizations, businesses, and city or county staff, trusted community organizations, as well as members of the intended audience themselves to provide diverse ideas and perspectives. If engaging members from the underserved communities, consider providing financial compensation, such as a stipend for their time, covering transportation costs, or other associated expenses.

Consider the following organizations and stakeholders:

- Housing authority and affordable housing providers
- Public safety officials (fire, police)
- Food pantries
- Faith-based organizations
- Community action agencies
- Schools & after-school programs
- Local commissions or task forces, such as human rights, diversity, equity, and seniors
- Non-profits or charitable organizations serving the intended
- Senior centers or organizations serving seniors



Ongoing Stakeholder Engagement

Stakeholder engagement should be ongoing throughout the process. We suggest identifying stakeholders as early as possible, but with more research in Step 2 and as you refine your strategy, you may find the right people are not in the room and need to be included to implement your chosen strategy. Likewise, once you have chosen a strategy in Step 3, planning and implementing the strategy may require additional stakeholders.

If portions of your intended audience speak English as a second language or no English at all, it will be crucial to engage stakeholders that can communicate with your community's populations in-person, on the phone, and through writing. These stakeholders will need to become an integral part of implementing the strategies planned by the Energy Action Team so there is a trusted, accessible resource.

When you invite your stakeholders to participate in this exercise, be sure to communicate why their involvement is important (e.g. different perspective, relevant program or service) in the process and how they can remain engaged throughout implementation.



Resources

- [Stakeholder Meeting Invitation Email Template](#)
- [Potential Organization Partners](#)

STEP 1: SET A CLEAR GOAL

Before you start to reach out to your underserved populations, work with your stakeholders to set a clear goal that help you focus your efforts as you build out your strategy. The goal may be quantitative, such as an increase in energy savings or program participation, or it may be more qualitative, such as strengthening your team’s relationship with underserved communities.

STEP 2: UNDERSTAND THE NEEDS OF YOUR UNDERSERVED POPULATIONS

Once you set your goal, you can start to use data to understand the needs of your underserved populations and identify the gaps in services, policies, and programs. Include your stakeholders early in this process to help you identify the underserved populations in your community, verify your findings from data research, and identify additional barriers and opportunities within these populations.

Consider hosting virtual or in-person meetings to work on these steps together or react to findings and discuss next steps.

Baseline Assessment

Start with a baseline assessment to help you understand existing policies, programs, and resources to inform your strategy planning (Step 4). The baseline assessment will also help you understand the types of underserved populations in your community, so your strategies have the biggest impact. Based on your findings, you may need to customize your stakeholder engagement to include people and organizations that focus on the underserved populations you have identified through the process of establishing a baseline.

See the resources section for the [Guiding Questions Worksheet](#) to assist you. Ask your stakeholders to complete this sheet separately, or with you, to gain additional perspectives. These questions can be answered directly or used as a guide.

Gather Data

Data can be a powerful tool to gain key insights about your underserved populations, including which segments may have the biggest need for energy efficiency. In addition to looking at program participation data (provided through Partners in Energy), using demographic and housing data can also help with decision-making, generate empathy, and garner support from external partners.

Data sources we encourage you to use are:

- Xcel Energy’s Partners in Energy data reports
- Low-Income Energy Affordability Data Tool
- American Community Survey

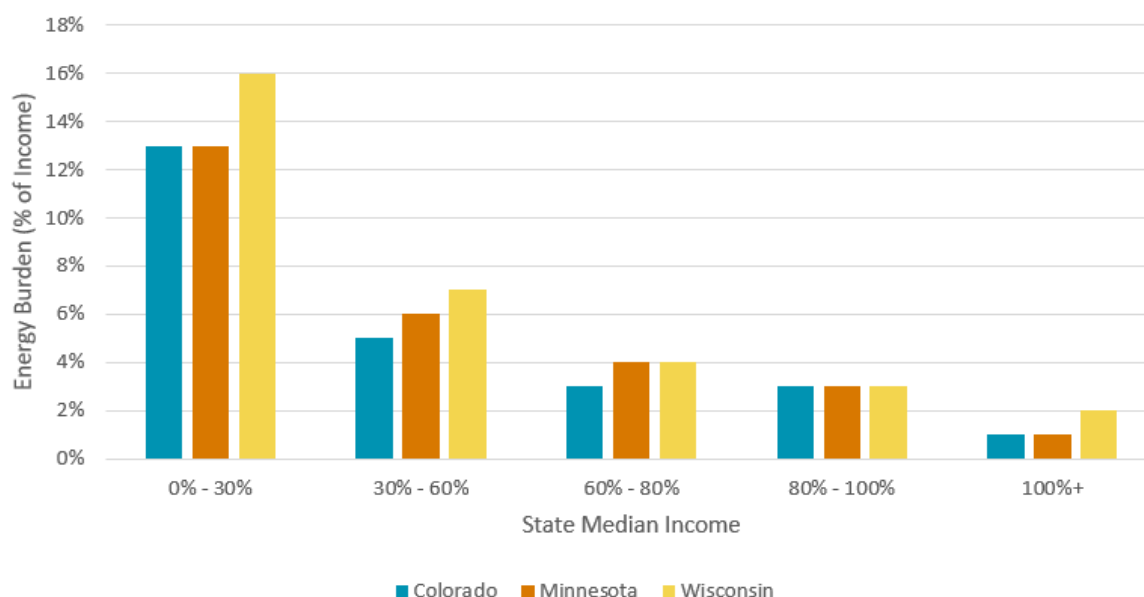
Most data tools allow you to customize the data to understand the different segments of your community. Suggested data to research may include:

- Energy burden
- Poverty status
- Monthly housing costs
- Age
- Housing tenure
- Housing age
- Language spoken at home

You can also compare these data to each other to look for any significant needs (for example, comparing energy burden versus tenant age may show that seniors have a disproportionately high energy burden compared to younger populations). See the resources section for the [Data Tools Overview](#) to guide you through the different tools available and support for interpreting the data.

Energy burden is defined as the percentage of gross monthly income spent on energy costs. While energy burden may vary across communities, data show that energy burden in low-income households is three times greater than in non-low-income households (ACEEE, 2016). Figure 1 shows the energy burden in relation to income in each of the states Partners in Energy serves. As shown in the chart, the lowest income bracket, which makes 30% or less than the area median income, experiences energy burden at a higher rate than does any other income bracket. This energy burden is 12% of monthly income in Colorado, 13% in Minnesota, and 16% in Wisconsin.

Energy Burden in Partners in Energy States



Research Benefits and Barriers to Participation

A benefits and barriers assessment can help the team understand the different challenges underserved populations in your community face and determine what will motivate specific populations to take the action you want to encourage. We recommend you complete this exercise in person with your stakeholders, since the discussion is more interactive and collaborative. Some example barriers and potential solutions for various underserved groups are shown in the table below. This list is not intended to be exhaustive and your group should assess the barriers and potential solutions of your chosen communities independently.

Underserved Population	Example Barrier	Example Solution
Seniors	<ul style="list-style-type: none"> Limited technology knowledge/access – cannot sign up online for programs 	<ul style="list-style-type: none"> Provide phone numbers or in-person sign-ups for programs and services
English as a second language	<ul style="list-style-type: none"> Lack of outreach materials in their primary language 	<ul style="list-style-type: none"> Develop outreach materials and offer implementation services in other languages
Persons with physical disability	<ul style="list-style-type: none"> Limited physical ability to install upgrades Limited ability to read website, watch videos, or read print material that is not accessible to blind and deaf users 	<ul style="list-style-type: none"> Home Energy Squad technicians to install upgrades during a home visit

See the resources section for a [Barriers and Benefits Worksheet](#), which includes directions for completing a benefits/barriers assessment.



Review your Baseline Assessment

Once you've completed the baseline assessment, gathered data, and identified barriers and potential solutions, you should be equipped with the information to understand:

- Who are your underserved populations?
- What are the policy, program, and service gaps those populations face?
- What challenges do underserved populations face?
- What resources do we have through Xcel Energy and other community partners to address these challenges and gaps?



Ongoing Stakeholder Engagement

Should you choose to meet with your stakeholder group to review the information together, below are some helpful discussion questions:

- Did any of the information surprise you?
- Do the data support focusing on the populations you initially expected were underserved? Is there a different population segment you should be considering?
- Are there programs or services to serve this segment?
- Are there barriers preventing underserved populations in your community from using these programs? If so, how can you show the benefits to motivate participation?

Once you are grounded in the underserved population segment(s) to serve and the resources and programs available, you and your stakeholders can start to plan your strategy.



Resources

- [Guiding Questions Worksheet](#)
- [Data Tools Resource Worksheet](#)
- [Benefits & Barriers Worksheet](#)

STEP 3: NARROW YOUR FOCUS AND IDENTIFY YOUR STRATEGY

Once you've established a baseline assessment, gathered data on the underserved population(s) in your community, and identified benefits and barriers, the next step is to narrow your focus and determine your intended audience and the strategy (or strategies) you will use to.

The intended audience can include an entire segment of underserved populations, such as all low-income households, or a smaller segment, such as senior citizens on a fixed income or non-English speaking populations. The research and worksheets completed in step 2, along with the stakeholder group, will help narrow down an audience to focus on.

When determining what strategies to implement, consider the level of engagement required for the intended audience. Some strategies may have the goal of simply raising awareness of available resources, while others may ask people to change their behaviors. The table below describes a range of potential engagement (Blue Sky Consulting Group & CommonKnowledge, 2012):

Possible Goals for Engagement

Awareness	Enrollment/ Usage	Education/ Involvement	Motive Change	Empowerment
Draw attention to services, education, or other opportunities	Enroll residents in programs or increase use of County Services	Teach residents about important issues/or involve them in decision-making	Inspire changes to behavior	Enhance the community's ability to identify and mobilize around self-selected issues

Some example strategies may include:

- Increase awareness of existing resources (Awareness)
- Increase participation in Xcel Energy low-income programs (Usage)
- Reduce energy burden through energy efficiency and conservation (Motive Change)
- Establish community solar garden for intended audience (Empowerment)
- Form a coalition to address energy burden in the community (Empowerment)
- Train local volunteers on renewable energy subscriptions to do targeted enrollment campaign (Enrollment/Empowerment)



Strategy Example: Partner with Nonprofit Organizations and Housing Authority to Share Information About Free Home Energy Audits

Bloomington, MN

The City of Bloomington worked with its Housing and Redevelopment Authority (HRA) and local community organizations to promote free Low-Income Home Energy Squad visits to qualified Bloomington residents. The City conducted outreach using local community organization's social media channels and leveraging the HRA's relationship with property managers of their buildings to get the word out using postcards and posters in common areas to promote the free visits.

STEP 4: DEVELOP STRATEGY AND OUTREACH PLAN

Once you have identified your intended audience and strategy, the next step is determining specific actions to take to implement the strategy. Be sure to consider metrics for tracking progress, such as number of people signed up for a program, number of flyers handed out at an event, or energy savings per customer. The strategy and outreach plan template in the resources section will guide you through some of the things to consider as you develop the strategy.

Outreach will be an important component of implementing the selected strategies and will vary depending on the intended audience. Your audience may not use the same types of communication that your other community engagement efforts have used, such as local government social media. If your intended audience speaks multiple languages, you will need to translate materials, social media posts, videos, or presentations, and ensure implementation providers can also speak the language. For example, if you choose to target outreach to the Somali population in your community for Home Energy Squad® visits, flyers and other outreach should be available in Somali, and implementers should have a translator available. Some questions to consider about your audiences include the following (Blue Sky Consulting Group & CommonKnowledge, 2012):

- Where do they live, work, and congregate?
 - What are the preferred communication styles?
 - What languages are spoken and read?
 - What are levels of educational attainment?
 - Through what family or community structures does effective communication take place?
- Who do they trust?
 - Who are the leaders in their community?
 - Which community groups or organizations?
 - Which government organizations or representatives?
- What are the community values? (relate to energy use/needs)
- What are the challenges? (relate to energy use/needs)
- What are the priorities? What do they need?

Outreach should enlist existing channels and trusted organizations within the intended audience as much as possible. Some ways to leverage these resources might include:

- Providing communication materials to hand out during normal interactions
- Providing talking points to discuss energy resources
- Collaborate to host an event, or have a table at an existing event
- Collaborate on a social media campaign
- Collaborate to host an educational workshop or community meeting



Strategy Example: Manufactured Home Outreach Targeting Spanish Speaking Population

Fairbault, MN

City of Fairbault, MN, in partnership with local nonprofit Growing Up Healthy and Home Energy Squad®, conducted targeted outreach to income-qualified residents at manufactured home communities. The goal was to deliver free Home Energy Squad visits to qualified households that were accessible to both English- and Spanish-speakers. All materials were translated to Spanish and distributed via existing channels or as door hangers. Sign-ups for the visits were done on the spot, rather than directing to another source, making it easy for residents. Visits were also done with translation as needed. Prior to a full rollout of the strategy, a pilot was conducted to test the resources and outreach activities. The pilot and full rollout of outreach was successful because of the local partnerships and use of existing channels.

If existing organizations or channels cannot be used it will be very important to understand the questions listed above. Keep in mind that you will need to take your message directly to your intended audiences. This might include tabling at local stores, shelters, food banks, senior centers, churches, parks, community cultural centers, etc., to provide information as people are going about their normal daily routines.

When hosting events, be sure to consider what challenges people may face in attending an event. There are often simple solutions to some of these challenges, but they should be planned for in advance to gather proper resources and inform the community of the availability of resources. Some challenges to consider include, but are not limited to, the following:

- No childcare available
- Inconvenient time or place
- Mealtime conflicts
- Lack of transportation
- Religious conflicts

Additionally, explore opportunities to incorporate culturally affirming features into your events. For example, you may want to work with the community to organize a potluck to encourage participation. The Strategy & Outreach Plan Template also includes a section to plan outreach activities, including consideration of timelines, challenges and how to address them, and necessary resources.



Resources

- [Strategy & Outreach Plan Template](#)

STEP 5: IMPLEMENT STRATEGY AND TRACK PROGRESS

Once the Energy Action Team has developed an actionable strategy and outreach plan, implementation of the strategy can begin! The duration of implementation will vary by strategy, but you should have a definitive start and end date. If the strategy timeline is ongoing, set milestones to help track progress of how implementation is going.

During implementation, the Energy Action Team or designated lead should keep track of progress based on the targets and metrics identified during Step 3. It may also be beneficial to track points of contact if this is not already a metric. The team should work with partner organizations to track metrics to gauge the impact of the strategy, such as number of points of contact, flyers handed out, social media analytics, etc.



Resources

- [Tracking in Strategy & Outreach Plan Template](#)
- [Flyers](#)
- [Social media content](#)

NEXT STEPS

Once the implementation period is complete and outcomes have been tracked, you can gauge your progress and successes. In addition to reviewing targets and metrics, it is also important to assess what went well, what unexpected barriers did you encounter, and what can be improved in the future. The team is encouraged to share the information broadly amongst partner organizations and via social media channels.

From here, the Energy Action Team can reconvene to determine how to scale the strategy effort for a larger impact, plan new strategies if desired, or move on to other Partners in Energy efforts.

