

# **EEFA: RESET, RESTART, REIMAGINE**

**PHASE 1 ASSESSMENT REPORT  
MAY 2021**

# Executive Summary

The work of Energy Efficiency for All (EEFA) remains crucial to increasing energy efficiency in multifamily affordable housing. The structure moving forward must be anchored in EEFA's mission while amplifying the voices and leadership of state and local partners. EEFA partners described a vision for aspects of the future of the initiative, including pivotal values, what they need to accomplish this vision, and a description of a strong funding partner. The described vision for the future - community-driven solutions, communication, trust, removing energy burden from affordable housing, a broader connection to advocacy, and data showing progress in BIPOC communities - is different from EEFA as it is currently constituted. Many EEFA partners are primed to make this shift during the Reset, Restart, and Reimagine (RRR) process.

## **BACKGROUND AND IMPETUS FOR RESET**

The EEFA initiative is composed of partner organizations in 12 states and 4 national partner organizations. Partners include organizations focused on utility policy, energy efficiency, housing, coalition building, and environmental and housing justice. Since the 2013 launch, EEFA has increased available funding from utility companies and state energy offices by \$769 million to provide funding to retrofit housing and contribute to making it more comfortable, healthy, efficient, and affordable for hundreds of thousands of people.

However, prior structural reviews, and partner input provided between November 2020 and February 2021 reveal that issues persist across the initiative related to power imbalances, coalition management, and lack of transparency. Even though EEFA has been evolving to address some of these issues, the revelation in September 2020 that a Black-led organization was mistreated and harmed by the way EEFA was operating drove The JPB Foundation (JPB), as primary funder of EEFA, to press pause and engage all partners in a process beginning in October 2020 to reimagine EEFA.

## **APPROACH**

JPB hired Keecha Harris and Associates, Inc. (KHA) to shepherd the RRR process. KHA's facilitation role is anchored in a set of experiential and strategic objectives. Experiential objectives are those intended to engage participants in direct experience and focused reflection to increase knowledge, develop skills, clarify values, and develop participant capacity to contribute to their communities – what should result from a person's full participation. Strategic objectives are those operational shifts intended to improve the initiative's abilities to reach its end goal of ensuring that existing multifamily affordable housing receives its fair share of utility dollars to implement energy efficiency retrofits.

### ***Listening Sessions***

Listening sessions were held to provide space for key stakeholders to define what is and is not working well in EEFA's governance structure; to assess how racial equity was operationalized in EEFA; and to identify EEFA assets that can contribute to solving long-standing problems, including power dynamics. Twelve sessions were held over the course of two weeks.

## *Interviews*

Interviews were held to hear each EEFA partner's perspective on the initiative's governance, racial dynamics, and potential ways forward. After a set of opening questions, interviewees were asked about EEFA governance and structure, racial equity in the initiative, and a vision for the future of this body of work. Thirty-six interviews were conducted in December 2020 and January 2021.

## *Survey*

Individual EEFA participants were surveyed to 1) obtain individual feedback about how racial equity is operationalized; 2) glean insight into whether the initiative behaves as a coalition; and 3) gain further input on individual visions for EEFA's future. The survey was available for response from January 5, 2021, to January 29, 2021. Fifty-one people responded to the survey.

## **SUMMARY OF DATA**

Overarching findings from listening sessions, interviews, and surveys surfaced areas to focus the next steps in the RRR process. Findings can be distilled into the following broad themes:

- **Racial equity in EEFA.** How is racial equity operationalized within EEFA? Participants explored and discussed the role of racial equity as it stands within the EEFA structure, practice, and function.
- **EEFA's structural effectiveness.** What are the current perceptions of the structure within EEFA? Participants explored and discussed how various aspects of EEFA currently operate.
- **Vision for the future of EEFA.** What should the future of EEFA look like? Participants discussed changes, elements to keep, and areas for improvement within EEFA as they look forward.

## *Racial Equity in EEFA*

Racial equity and racial equity in practice were discussed across the listening sessions, interviews, and survey. Participants spanned the spectrum in their descriptions of how racial equity is woven into the EEFA work itself in terms of what is and is not successful within EEFA. The work itself and racial equity workshops were identified as specific examples of how racial equity has been promoted in EEFA. Additionally, state and national partners shared that through clarifying organizational roles, creating space to consider different perspectives, and improving the hierarchy and racial inclusiveness of leadership among EEFA and its partners, a more racially just and equitable body of work can be achieved.

When approached with a series of statements related to racial equity within EEFA, state and national partners unanimously agreed that EEFA's performance on each issue was only partially demonstrated. Perceptions of racial equity in EEFA were discussed and distilled into a need to address:

- dominant white cultural norms,
- racial equity being limited to conversations,
- power-sharing,
- participation in training across the network,
- race and poverty being conflated, and
- the evolution of EEFA as it relates to racial equity, over time.

State and national partners discussed state coalition interest in incorporating racial equity into the work, the lack of diversity within leadership, the fact that racial equity is an afterthought, and the fact that

there is limited communication across state or national partners as areas for improvement in EEFA's performance as it relates to racial equity. When discussing racial equity in practice, most state and national partners shared that their organization had implemented a racial equity training, workshop, or forum and that either facilitated or non-facilitated conversations around racial equity were happening in their state coalition.

### ***EEFA's Structural Effectiveness***

EEFA's current structure, information-sharing practices, and roles and responsibilities were discussed across the listening sessions, interviews, and survey. Coalitions and access to expertise were identified as areas that are working well within EEFA while prioritization of racial equity, little community engagement, and lack of transparent communication were identified as elements of EEFA that hinder progress toward accomplishment of EEFA's mission. State partners and national partners also identified leadership support and development and flexibility in repositioning initiative assets as areas for improvement within EEFA. State partners were especially uncertain about the effectiveness of leadership within EEFA and demonstrated this through their neutral responses to leadership-focused questions.

State and national partners also varied in their rating of effectiveness of approaches to participation and relationships within the EEFA initiative, with national partners being more likely to agree with the effectiveness of approaches compared to state partners.

State and national partners noted information sharing as an important role within EEFA and one that could use improvement. Partners demonstrated high motivation for information sharing, with weekly email communication deemed most appropriate. Partners identified the EEFA initiative as being siloed, with each national partner having a separate role. A negative consequence of this is limited communication or collaborative decision-making across state and national partners.

### ***Vision for the Future of EEFA***

The future of EEFA was discussed in the partner interviews and survey. State and national partners discussed shared values for a commitment to equity, transparency, inclusion, and community as characteristics most pivotal to EEFA's future. Partners shared ideas for critical elements for shaping EEFA's future. These included community-driven solutions, communication, trust, and the work supporting efficient, affordable housing. Future accomplishments partners would be proud of were also identified by state and national partners as community-driven solutions, removing energy burden from affordable housing, a broader connection to advocacy, and data showing progress in BIPOC communities.

Partners identified organizational needs to authentically contribute to the future vision of EEFA. These included financial resources, the initiative-supporting communities, leadership change, communication, and the support of The JPB Foundation.

Types of and specific organizations to be included in EEFA were also identified by state and national partners. Also, partners agreed that including community-facing organizations, tenant organizations, housing authorities, and environmental justice organizations will be important for shaping the future of EEFA. State and national partners identified diverse leadership, work done through a racial equity lens, and community engagement as key elements for a racially equitable EEFA five years from now. Overall, participants indicated a need for additional support and flexibility – some in the way of financial or

technical expertise support, and others in the way of expanding the network to include additional appropriate partners at the table to support the effort.

## **PRINCIPLES FOR RESET, RESTART, AND REIMAGINATION**

A set of recommended principles for EEFA going forward emerged from the RRR assessment phase, prior assessments, and review of literature. The recommended principles are to: build trust; employ transparency; center impacted people and communities; incorporate racial equity holistically; honor and amplify what works; shift or share power; incorporate best practices of networks (at minimum) and coalitions (if indicated); embrace expansion; adopt a posture of continual examination; and develop standards of practice for the funding ecosystem.

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# Introduction

## EEFA HISTORY AND PURPOSE

In 2013, Energy Foundation, the National Housing Trust (NHT), and the Natural Resources Defense Council (NRDC) joined forces to establish a national partnership known as Energy Efficiency for All (EEFA) with funding support from The JPB Foundation. While not an original national partner organization, Elevate Energy began working with EEFA partner organizations in 2015. EEFA began with a vision that organizations, working separately on energy and affordable housing issues, could employ a collaborative, collective, and people-centered approach to ensuring that existing multifamily affordable housing received its fair share of utility dollars to implement energy efficiency retrofits.

The initiative aims to build capacity to change policies and practices by seeding and supporting coalitions in 12 states. State coalitions include a variety of housing, health, energy efficiency, environmental, and community advocacy organizations.

EEFA national partners support these coalitions by providing training and funding; coordinating coalition activities; conducting research; and providing coalition-building and technical expertise. Together, EEFA state coalition partners work to ensure that utility and state, local, and federal government entities provide equitable investment to improve the efficiency of affordable multifamily homes; advance proven best practices in efficiency program design and implementation to help meet the needs of affordable housing building owners and residents; and advocate for policy solutions to ensure that nontoxic, healthy building materials are used in multifamily affordable housing retrofits.

## EEFA STRUCTURE AND ROLES

The EEFA initiative consists of national and state partners. The partners relate to each other in a variety of ways, from being in coalition to address state priorities to working together on cross-cutting teams to address issues impacting most or all the states.

### *State Partner Organizations*

EEFA state partner organizations come together in coalition or network from within 12 states – California, Georgia, Illinois, Louisiana, Maryland, Michigan, Minnesota, Missouri, New York, North Carolina, Pennsylvania, and Virginia. Partners include organizations focused on utility policy, energy efficiency, housing, coalition building, and environmental and housing justice. These partners work together to identify priorities for each state and plan the role each partner will play in addressing some or all the state priorities. Each state coalition partner has discrete organizational roles, as well as leadership or contributor roles throughout the initiative. (For a listing of state partners see Appendix A.)

### *National Partner Organizations*

The four EEFA national partners represent different fields and areas of expertise:

- **Elevate Energy** implements energy efficiency projects in the affordable housing sector.
- **Energy Foundation** has deep expertise working with grantees supporting energy policy initiatives at the state level.
- **National Housing Trust (NHT)** is a national leader on affordable housing policy with deep relationships in the affordable housing community.
- **Natural Resources Defense Council (NRDC)** is a national leader on energy efficiency policy with deep experience in state energy policy and regulatory affairs.

These organizations work together to seed and support coalitions across 12 states.

### ***Roles of National Partner Organizations***

The four EEFA national partner organizations have discrete organizational roles, as well as roles as leaders of the initiative. These roles include provision of implementation technical assistance by Elevate Energy, management of the regranting process to state coalitions by Energy Foundation, provision of housing-related legal and policy expertise by NHT, and provision of staffing support and technical assistance by NRDC.

### ***National Initiatives (Cross-Cutting Teams)***

In addition to strategies led by state coalitions, the EEFA initiative includes several national, cross-cutting approaches:

- Network for Energy, Water, and Health in Affordable Buildings (NEWHAB)
- Racial Equity Working Group (REWG)<sup>1</sup>
- Sustainability in Affordable Housing Lender Learning Network (SAHLLN)
- Federal Policy Team
- Healthy Affordable Building Materials Team

The EEFA website ([www.energyefficiencyforall.org/initiatives/](http://www.energyefficiencyforall.org/initiatives/)) provides descriptions of the national initiatives.

## **EEFA AND RACIAL EQUITY**

### ***Nationally Led Initiatives and Programs***

The REWG was formed in 2018 to ensure equitable and inclusionary EEFA impacts. The group was composed primarily of representatives of the four national partner organizations and NEWHAB. The working group engaged Two Brown Girls Consulting Cooperative to facilitate its learning and development.

Based on interviews with state and regional leads, external partners, equity working group members, and other staff, the group initially sought to define “racial equity in the context of EEFA’s broader

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<sup>1</sup> Following examination of needs, the group previously known as the Equity Working Group focused its work on racial equity and is now known as the Racial Equity Working Group. This group is referred to as the Racial Equity Working Group (REWG) throughout the remainder of this document.



mission and created a glossary of terms to talk explicitly about race that [the working group] practiced and built into [their] vocabulary.”<sup>2</sup> The group worked with partners in three states – Minnesota, North Carolina, and Pennsylvania – to “deeply engage with the racial equity tools that EEFA ha[d] developed and co-create strategies with coalition partners to better integrate racial equity into their work.”<sup>3</sup>

In the summer of 2020, the REWG began to expand the working group’s membership to include representatives of more state partners. It also began to provide support to state coalitions that requested assistance on a range of issues, including conflict resolution.

In the fall of 2020, the REWG highlighted three ongoing challenges within EEFA as well as some solutions to mitigate those challenges:

- Lack of a *structured conflict management system*;
- Lack of an *established process for state partners to provide assessments* on the direction of the project and their needs on an annual basis; and
- Lack of *flexibility, workload capacity, and funding capacity* to address the root causes of housing unaffordability and high energy costs.

Further information about the REWG obtained during document review, interviews, and a group conversation with available members is presented in the results section.

### ***NEWHAB-Led Initiatives and Programs***

NEWHAB, as the convener for individuals in EEFA partner organizations and other interested individuals, is a space for learning and conversation. NEWHAB membership developed an equity manifesto ([www.energyefficiencyforall.org/resources/newhab-equity-manifesto/](http://www.energyefficiencyforall.org/resources/newhab-equity-manifesto/)) expressing the network membership’s stance and work around institutional racism and other barriers to full participation in the economy and enjoyment of clean air, safe water, reliable energy, and high-quality shelter. NEWHAB also hosts sessions and webinars on racial equity.

### ***Coalition-Led Initiatives and Programs***

State coalitions have identified needs as they relate to centering racial equity in their own strategies. During the survey portion of this assessment, respondents in state coalitions provided details on the work they are doing within their own coalition. The results section contains further details (see *Racial Equity in Practice-Interviews*; p. 17).

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<sup>2</sup> REWG memo to The JPB Foundation, November 2020. Most of the information in this section can be attributed to a letter from the REWG to JPB staff and a conversation with available members of the REWG on February 28, 2021.

<sup>3</sup> REWG Memo, November 2020.

## IMPETUS FOR RESET

For at least three years, events and studies have provided signals to EEFA partners and JPB that the governance and structure of EEFA has been a challenge and that issues persist related to power imbalances, coalition management, and lack of transparency. While EEFA has been evolving (e.g., steering committee reconstitution) to address some of the issues, there is an opportunity to accelerate positive change.

The need for a new approach became acute when, in September 2020, JPB learned first-hand from a Black-led organization that it had been continually marginalized and their efforts appropriated over the past few years. Over time, they had tried to elevate their concerns but without success. As we all know, these types of unchecked actions cause harm and destroy the vital trust necessary in building a movement. The studies and critical incidents described in this section provide detail on why JPB, as the primary funder of EEFA activities, sought to pause and reset the initiative (see Appendix C).

On March 27, 2018, the Partnership for Southern Equity (PSE), wrote to the Energy Foundation (EF) as the lead regrantee partner in EEFA to detail PSE's history and experience with the Georgia coalition (see Appendix D). PSE included the following recommendations for EEFA collaborations:

- Building trust within collaborative coalitions and with target communities is critical.
- Collaborative covenants that frame rules of engagement within a coalition must be enforced after they are drafted and ratified.
- Actions by coalition members that diminish or demean other members must not be tolerated.
- National EEFA partners must hold the integrity of the coalition-building process and the reputations of member organizations in high esteem.
- Coalition-building efforts must begin with the end in mind. A clear vision must be crafted for long-term impact and institutional support after the life cycle of the effort has ended, and coalition work must be guided by that vision.

EF and others took steps to address the concerns being raised; however, the response was insufficient, and PSE continued to experience unacceptable harm. The letter was not shared with JPB by EF or any of the national partners.

In September 2020, PSE sent a second letter to Energy Foundation, exercising its right to exit the partnership as the micro- and macro-aggressions they suffered at the hands of some coalition partners and the national leads were no longer tenable. The reasons provided were: 1) PSE focusing on the growth and stability of its longest-running racial equity coalition, the Just Energy Circle, which had not been supported by EEFA; 2) the extractive nature of the relationship with EEFA as it related to the initiative's racial equity evolution; and 3) the divisive dynamics of the Georgia coalition. The letter closed with a statement of support for EEFA's vision and a "hope that [their] departure will help to generate dialogue locally and nationally about the importance of keeping people at the center of the work and supporting foundation-led efforts in ways that show a commitment to racial equity in policy, operations, and culture." (See Appendix E).

Also in September 2020, Groundswell Community Power, another EEFA Georgia coalition partner, sent a letter to the Energy Foundation. The letter noted that “the function of the EEFA GA coalition is not in alignment with Groundswell’s values nor with goals and principles that the coalition itself purports to uphold.” The letter closed with an acknowledgment of the coalition’s potential if it practices what it preaches regarding both partner behavior and equity (see Appendix B). Groundswell then elevated its concerns to the attention of The JPB Foundation.

Throughout this time, the Georgia coalition had been supported by consultants in coalition management and principles of partnership development and implementation.

Given JPB’s long-standing relationships of trust and significant funding to the national partners for EEFA and other bodies of work, PSE assumed considerable risks by elevating the 2020 formal complaint directly to The JPB Foundation two weeks after sending it to Energy Foundation. Following receipt of the letter from Groundswell and the 2020 letter from PSE, JPB met with PSE and then pressed pause.

While the critical incidents included here are representative of the documentary evidence available, testimonial evidence obtained during the current process confirms that these incidents are neither geographically nor time isolated (see pp. 17-22). It is important to note that all Georgia partners have opted to contribute to the EEFA RRR. In addition, PSE remains involved, despite being undermined, in hopes of a revamped effort that centers racial equity and justice in its leadership, programming, and operations.

Cumulatively and collectively, the situational and circumstantial facts suggest that EEFA, its leadership, and its way of operating necessitated a critical review of practices and restructuring. JPB chose to press pause and institute the RRR process, the goals of which were to establish a shared understanding of what was not working and support a path for EEFA partners that does not repeat the past missteps and justly distributes power and resources (see Appendix B).

## **OUTLINE OF RESET, RESTART, AND REIMAGINE**

The JPB Foundation communicated the beginning of the RRR via letter on October 28, 2020 (See Appendix C). The Reset, Restart, and Reimagine (RRR) process aims to support an EEFA that realigns the governance and structure of EEFA around a more equitable distribution of power using a racial-equity lens, building a culture of mutuality, and creating shared intentionality among all partners to use inclusive practices that are not extractive of participating communities.

RRR is a multistep process. To ensure that all interested individuals have access to information about the RRR process, detailed information about the process is continually updated on the RRR website ([https://rise.articulate.com/share/O5C8SEaNujRVE8jWZ48qldwtfqa6Zmge#/\) Figure 1 provides a timeline of the process.](https://rise.articulate.com/share/O5C8SEaNujRVE8jWZ48qldwtfqa6Zmge#/)

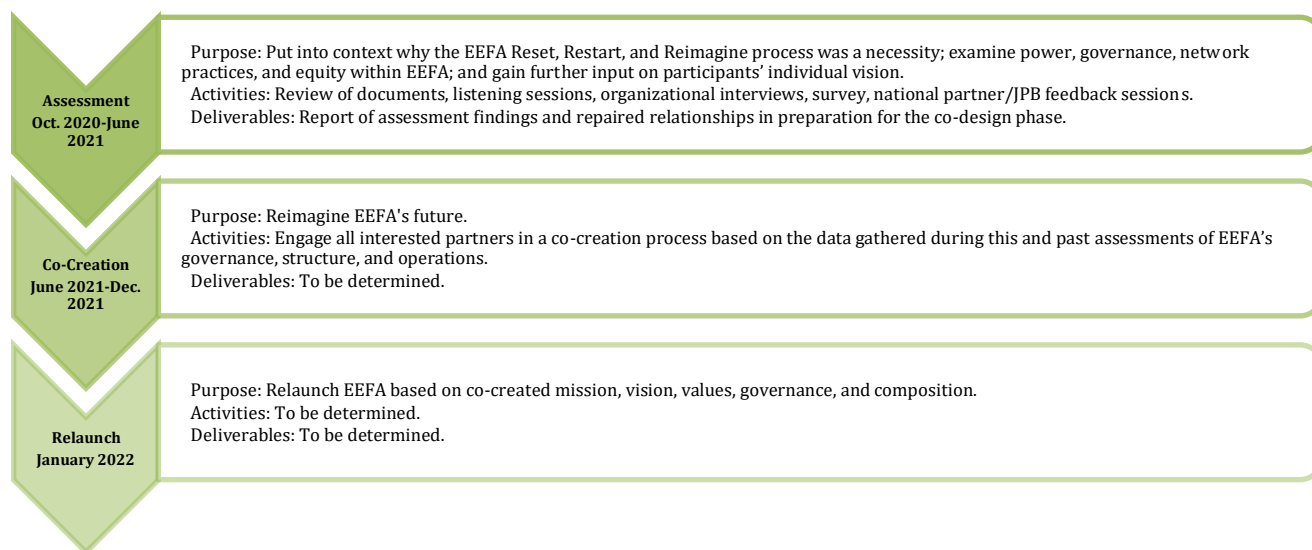


Figure 1. Timeline of RRR process

## Approach, Activities, and Analysis Methodology

### APPROACH

The JPB Foundation hired Keecha Harris and Associates, Inc. (KHA), to shepherd the RRR process. KHA's facilitation role is anchored in a set of experiential and strategic objectives. Experiential objectives are those intended to engage participants in direct experience and focused reflection to increase knowledge, develop skills, clarify values, and develop participant capacity to contribute to their communities – what should result from a person's full participation. Strategic objectives are those intended to improve the initiative's operational abilities to reach its end goal of ensuring that existing multifamily affordable housing receives its fair share of utility dollars to implement energy efficiency retrofits. The EEFA RRR objectives are as follows:

#### Experiential:

- Reset relationships of local and national EEFA partners around trust and transparency.
- Establish a system of governance and accountability that amplifies the contributions of all partners.
- Contextualize the transactional gains of EEFA relative to when racial equity and justice were and were not upheld in collaboration.
- Develop performance standards and processes that recalibrate EEFA power dynamics at all levels of leadership and contribution, amplify the voices of state and local partners, and gainfully engage those partners.

Strategic:

- Determine partner(s) and processes for the distribution of EEFA-related grantmaking and contracts.
- Advance and deepen the scope of EEFA policy gains and relationships.
- Develop shared understanding of current EEFA reality among all partners.
- Reset EEFA management structure with shared power and transparency.

## ACTIVITIES

### *Listening Sessions*

Listening sessions were held to provide space for key stakeholders to define what is and is not working in EEFA's governance structure; to assess how racial equity is operationalized in EEFA; and to identify EEFA assets that can contribute to solving long-standing problems, including power dynamics. Each session was facilitated by two KHA facilitators, with additional staff supporting small-group breakout discussions. The JPB Foundation Environment Program's vice president and senior program officer for its energy portfolio participated in the large-group conversations. During the breakout sessions, participant reflections in response to questions posed were recorded using the Padlet application.

The discussion prompts used in each session were as follows:

- When you talk about EEFA to people outside of the initiative, what do you speak on most?
- What aspects of the EEFA structure have been most effective? What aspects have been least effective?
- Please describe a specific example of how racial equity has been promoted in EEFA. What specific instances demonstrate the ways it has not?

The JPB Foundation staff could view anonymous participant responses , and KHA's facilitators led a post-breakout discussion with the whole group.

Twelve sessions were held over the course of two weeks. KHA began inviting partners to listening sessions on November 9, 2020. Groupings included consultants, each national partner organization individually, and combinations of state coalitions. There was one makeup session. In total, 112 people were invited, and 90 (80%) people participated. The sessions were not recorded. However, KHA staff recorded notes from participant input not entered in the Padlet application.

KHA sent session evaluations to participants after each session. Twenty-four percent of listening session participants provided feedback about their experience in the sessions as it related to the objective of providing a space to discuss structure and racial equity.

## Interviews

In individual interviews, each EEFA partner shared their perspective on the initiative's governance, racial dynamics, and potential ways forward. After a set of opening questions, interviewees were asked about EEFA governance and structure, racial equity in the initiative, and a vision for the future of this body of work. The full interview protocols are in Appendix F and Appendix G. Representatives from 51 organizations and 7 consultants were contacted for interviews. KHA spoke with 49 people during 36 interviews of 31 organizations (53% of organizations) in December 2020 and January 2021. While the intent was to obtain a single organizational perspective by conducting one interview per organization, scheduling concerns resulted in multiple interviews for some organizations. Following the initial outreach, targeted outreach was conducted in January to schedule interviews in coalitions from which there was little to no response in December. Table 1 provides the number of consultants, national, and JPB-funded EEFA state partner organizations that were interviewed.<sup>4</sup> It also includes the number of individuals interviewed in each category.

Table 1. Number of interviewed funded partner organizations by state

Coalition/ Group	Number of Funded Partner Organizations or Consultants	Number of Funded Partner Organizations or Consultants Interviewed	Percent of Funded Organizations Interviewed	Number of Individuals Contacted for Interviews	Number of Individuals Interviewed <sup>5</sup>	Percent of Individuals Interviewed
California	8	1	12.50%	11	1	9.09%
Consultant	7	6	85.71%	7	6	85.71%
Georgia	4	4	100.00%	9	5	55.56%
Illinois	4	2	50.00%	9	3	33.33%
Louisiana	3	2	66.67%	4	2	50.00%
Maryland	2	1	50.00%	6	1	16.67%
Michigan	6	1	16.67%	8	1	12.50%
Minnesota	5	1	20.00%	6	1	16.67%
Missouri	3	2	66.67%	4	2	50.00%
National	4	4	100.00%	30	15	50.00%
New York	5	2	40.00%	6	4	66.67%
North Carolina	1	1	100.00%	4	1	25.00%
Pennsylvania	4	2	50.00%	5	2	40.00%
Virginia	2	2	100.00%	3	5	166.67%
Total	58	31	53.44%	112	49	43.75%

<sup>4</sup> Each state coalition or network consists of JPB-funded and unfunded EEFA partner organizations. The percentage of funded partner organizations in each state ranges from 18% in Virginia to 100% in California, Georgia, Illinois, Louisiana, Michigan, Minnesota, and North Carolina.

<sup>5</sup> In some cases, a person KHA did not initially contact was asked by a colleague to join an interview. Those people were subsequently added to the list to receive the survey.

In addition to individual organizational interviews, 17 members of the REWG participated in a group conversation designed to learn more about the past and planned work of the group and to obtain their feedback on racial equity-related results obtained during the data collection process.

### ***Survey***

Individual EEFA participants were surveyed to 1) obtain individual feedback about how racial equity is operationalized; 2) glean insight into whether the initiative behaves as a coalition; and 3) gain further input on individual visions for EEFA's future. The survey was tailored to EEFA and informed by previously developed KHA data collection tools, the Portland State Cultural Competence Self-Assessment Questionnaire, the Annie E. Casey Foundation Race Matters: Organizational Self-Assessment, and the Internal Coalition Outcome Hierarchy.<sup>6</sup> Survey respondents were asked to:

- rate EEFA's racial equity priorities;
- rate EEFA's racial equity performance;
- provide details about racial equity work in state coalitions;
- rate EEFA partner organizations (state and national) and people in leadership roles (i.e., project co-directors, senior leads, regional leads, and state leads) as related to efficiency in practice;
- rate EEFA partner organizations and people in leadership roles as they relate to approaches to relationships;
- rate EEFA partner organizations and people in leadership roles as related to diverse participation;
- provide a vision for EEFA's values, accomplishments, racial equity, communications, funding, support, and restructuring; and
- respond to demographic questions.

The survey tool is Appendix H. It was available for response from January 5, 2021, to January 29, 2021. KHA sent three reminders during that period, including two announcing an incentive for the first 50 people to participate. In total, 118 people were invited to participate. This includes the initial listening session list and anyone whose email address was obtained after the listening sessions or who joined the interviews. Fifty-one (43%) responded to the survey. The first 50 people to complete the survey received an electronic Visa gift card in the amount of \$50.

### ***National Partner Reflection and Reconciliation Process***

In January 2021, KHA facilitated feedback sessions between JPB staff and senior leaders at each of the national partners. These conversations were preceded by voluntary learning sessions to acquaint each participant with how to give and receive healthy, honest, forthcoming feedback that centers on specific experiences and across power dynamics. The national partners were asked to conduct feedback sessions among themselves before the first of two sessions aimed at reflection and reconciliation

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<sup>6</sup> Portland State Cultural Competence Self-Assessment: <https://www.pathwaysrtc.pdx.edu/pdf/CCSAQ.pdf>; Annie E. Casey Race Matters: Organizational Self-Assessment: <https://www.aecf.org/resources/race-matters-organizational-self-assessment/>; and Internal Coalition Outcome Hierarchy: <https://pubmed.ncbi.nlm.nih.gov/16460424/>.

around the experience of PSE. In addition, the national partners also responded to a survey about their individual roles and contributions to EEFA.

The reflection and reconciliation process was framed as a multi-part conversation among the national leads and JPB. The first conversation was framed to engage senior leaders from each national lead organization and The JPB Foundation in reflection on their contributions to the trauma inflicted upon PSE, to account for their collective failure to center humans and relationships in EEFA, and to contemplate what restitution they might offer to PSE for the harm caused. The second session was framed to gauge any progress the national partners and JPB made in providing feedback to each other as an ongoing practice; and to articulate their understandings of the race-based premises of PSE's mistreatment. Each national partner has taken steps to reconcile with PSE.

### *Document Review and Observations*

KHA staff reviewed publicly available information about EEFA and background documents provided by JPB, some of which are referenced in this report. In addition, KHA staff documented observations of interactions among and between EEFA participants as an additional method of understanding the dynamics existing within EEFA.

## **ANALYSIS METHODOLOGY**

KHA staff used QSR International's NVivo software to analyze qualitative data collected during the listening sessions, interviews, and survey. Emergent thematic coding was used to identify themes in the listening session notes, interviews, and open-ended survey responses with probing questions used as a guide. Codebooks were established across data sources and compared for final analysis. For quantitative data collected during the interviews and survey, Microsoft Excel was used in the analysis.

# Results

Overarching findings from listening sessions, interviews, and the survey surfaced areas for the EEFA network to focus the next steps in the RRR process. Findings can be distilled into the following broad categories:

- **Racial equity in EEFA.** How is racial equity operationalized within EEFA? Participants explored and discussed the role of racial equity as it stands within the EEFA structure, practice, and function.
- **EEFA's structural effectiveness.** What are the current perceptions of the structure within EEFA? Participants explored and discussed how various aspects of EEFA currently operate.
- **Vision for the future of EEFA.** What should the future of EEFA look like? Participants discussed changes, elements to keep, and areas for improvement within EEFA as they look forward.

Data tables and figures for the listening sessions, interviews, and survey can be found in Appendix I.



## **RACIAL EQUITY IN EEFA**

Racial equity and racial equity in practice were discussed across the listening sessions, interviews, and survey. Participants spanned the spectrum in their descriptions of how racial equity is woven into the EEFA work itself in terms of what is and is not successful within EEFA. The work itself and racial equity workshops were identified as specific examples of how racial equity has been promoted in EEFA. Additionally, state and national partners shared that through clarifying organizational roles, creating space to consider different perspectives, and improving the hierarchy and racial inclusiveness of leadership among EEFA and its partners, a more racially just and equitable body of work can be achieved.

When approached with a series of statements related to racial equity performance within EEFA, state and national partners unanimously agreed that EEFA's performance on each issue was only partially demonstrated. Perceptions of racial equity in EEFA were discussed and distilled to a need to address: dominant white cultural norms, racial equity being limited to conversations, power-sharing, participation in training across the network, race and poverty being conflated, and the evolution of EEFA as it relates to racial equity, over time. State and national partners discussed state coalition interest in incorporating racial equity into the work, the lack of diversity within leadership, the fact that racial equity is an afterthought, and the fact that there is limited communication across state or national partners as areas for improvement in EEFA's performance as it relates to racial equity. When discussing racial equity in practice, most state and national partners shared that their organization had implemented a racial equity training, workshop, or forum and that either facilitated or non-facilitated conversations around racial equity were happening in their state coalition.

In this section, data are presented in the following sections:

- Racial Equity – Listening Sessions
- Racial Equity – Interviews
- Racial Equity in Practice – Interviews
- Racial Equity – Survey

### ***Racial Equity – Listening Sessions***

Listening session groupings included consultants, each national partner organization individually, and combinations of state coalitions. There was one makeup session. In total, 90 people took part.

Participants' responses spanned the spectrum as to how they discussed racial equity and what works and does not work within EEFA. Themes are discussed below:

- Participants mentioned the work itself (community-led projects) and racial equity workshops as specific examples of how racial equity has been promoted in EEFA. The community-led work itself was mentioned three times as often as racial equity workshops, indicating the importance of community-led work.
- Participants identified non-diverse leadership and not centering people as areas where EEFA has not promoted racial equity. Non-diverse leadership was mentioned twice as often as not

centering people, indicating that for state and national partners it is important to address the diversity of leadership.

- Participants shared their belief that through addressing organizational roles, considering different perspectives, and implementing a leadership change, a more racially just and equitable body of work can be achieved.
- When discussing ideas for propelling EEFA forward into a more racially equitable body of work, participants talked most often about leadership change as being important, specifically representation within individual organizations that are a part of the EEFA network.
- Participants noted that they want to see national leadership of EEFA from organizations that integrate racial equity into their work and that explicitly state the importance of racial equity in their missions and initiative designs.
- Participants discussed that it is important to have a better understanding of how size differences among organizations in EEFA impact dynamics and tensions within the network, and that this understanding would help move EEFA forward.
- Participants felt it was important to allow differing perspectives, perceptions, and realities of what “for all” means; this will help drive EEFA’s vision.

### ***Racial Equity – Interviews***

Racial equity practices as they are integrated into EEFA were discussed in the partner interviews. The following themes emerged: the need to address dominant white cultural norms throughout the initiative; the fact that racial equity work is limited to conversations and trainings; the existence of uneven power dynamics within the network; the importance of uplifting community voices and stories; the conflation of race and poverty; the importance of intersectionality; NEWHAB is the source for racial equity information; and the fact that racial equity work has evolved over time. Participants discussed:

- Lack of diversity in leadership needs to be addressed and dominant white cultural norms need to be examined and assessed for fit to EEFA’s goals.
- Racial equity is talked about a lot, especially with a focus on exploring and integrating racial equity. In practice, racial equity is not at the center, and partners are at a loss as to how racial equity work is translated into the field.
- White people in leadership need to understand the importance of sharing power to foster inclusivity.
- Authentic storytelling is important to advance racial equity and should be practiced.
- Communities of color and low-income communities are not one and the same and should not be treated or talked about as such.
- NEWHAB is the source of racial equity information, communication, and convening. They should not be the sole convener and should not be solely responsible for communication around racial equity and best practices.
- Racial equity was not explicitly stated as a goal at the inception of EEFA but has evolved over time.

### ***Racial Equity in Practice – Interviews***

State coalition members discussed the racial equity work being done in their state coalitions. Most respondents indicated that their organization had implemented a racial equity training, workshop, or forum. Additionally, participants mentioned that either facilitated or non-facilitated conversations around racial equity were happening in their state coalitions. Interviewees mentioned other areas of racial equity work including advocacy, the importance of adding or promoting BIPOC leadership, and self-education through readings, videos, and other media sources.

### ***Racial Equity – Survey***

Survey participants were asked to rate a series of statements related to EEFA's priorities and opportunities. Survey participant responses were broken down by race of the participant. Data are presented this way to show differing responses across self-identified racial groups. Data were also analyzed by partner type (state or national), but differences were more apparent when presented by race. Asian-, Black-, and white-identifying survey respondents had different ratings for EEFA's racial equity priorities. Of the 44 survey respondents who answered the question about race, 14% were Asian-identifying, 30% were Black-identifying, 52% were white-identifying and 9% did not identify their race.

When discussing removing barriers to opportunity for low-income communities and communities of color:

- Most Asian-identifying survey respondents agreed that EEFA was explicitly focused on this area, while Black-identifying survey respondents neither agreed nor disagreed and white-identifying respondents strongly agreed.
- Asian-identifying survey respondents agreed that EEFA is explicitly focused on reducing disparities among communities of color and low-income communities while Black-identifying survey respondents tended to neither agree nor disagree (neutral) and white-identifying respondents agreed.

Survey respondents also varied in their responses when considering EEFA's explicit focus on leveling the playing field for residents negatively impacted by energy-inefficient housing: Asian- and Black-identifying survey respondents neither agreed nor disagreed with this focus (were neutral) while white-identifying respondents agreed.

When discussing capacity building and asset building to support making affordable housing healthier and more energy efficient for low-income people and communities of color, Asian- and white-identifying respondents agreed that EEFA promoted these priorities while Black-identifying respondents were split between "neither agree nor disagree" and "agree," demonstrating an area for improvement.

Survey respondents also discussed opportunities provided by the EEFA network. Asian-, Black-, and white-identifying survey respondents had different ratings for the opportunities provided through EEFA:

- When discussing opportunities for partners to discuss barriers to opportunity for low-income communities and communities of color by improving access to energy efficiency programs and other resources, Asian-, Black-, and white-identifying respondents agreed.
- Survey respondents were asked to rate EEFA's effectiveness in providing opportunities for partners to discuss racial inequities. Asian-identifying respondents were split three ways between neither agree nor disagree, agree, and strongly agree. Most Black-identifying respondents neither agreed nor disagreed with this opportunity, though of note, a third disagreed with the effectiveness of this opportunity.
- White-identifying survey respondents agree that EEFA provides useful opportunities for partners to discuss leveling the playing field.

Survey respondents were also asked about their agreement with statements related to empowerment to address racial inequities and whether diversity, racial equity, and inclusion are values pivotal to EEFA leadership:

- When discussing empowerment to address racial inequities in EEFA, Asian-identifying respondents agreed this was an area where EEFA is inclusive. Black-identifying participants also agreed with this statement, while white-identifying respondents were split between agreeing and strongly agreeing with this statement.
- Diversity, racial equity, and inclusion were discussed as values and practices that are pivotal to EEFA leadership. Asian-identifying respondents were split between agreeing and strongly agreeing while Black- and white-identifying respondents strongly agreed.
- Asian-identifying respondents unanimously neither agreed nor disagreed that results of the EEFA work show a reduction in racial disparities in energy burden. Similarly, most Black-identifying respondents neither agreed nor disagreed though nearly a third agreed. Additionally, most white-identifying participants neither agreed nor disagreed.

With the neutral replies across participants, the EEFA network should push for improvement in results to show a reduction in racial disparities in energy burden.

Survey respondents distilled their rationale for responding the way they did to the following themes: No real changes have been made over time with respect to racial equity, and there is a need for data to track changes over time. Respondents felt that:

- EEFA claims to be focused on energy efficiency for low-income communities in affordable housing, but does not want to understand the connection between institutional racism, affordable housing, and energy efficiency;
- Data on energy retrofits and household demographics are very hard to come by, and as such it is difficult to prove that EEFA has moved the needle for communities of color relative to energy efficiency. These data, however, are needed to measure the impact from an advancing equity standpoint.

Survey respondents rated EEFA's performance on a variety of areas, including:

- Having a racially diverse senior leadership at the state level and nationally (i.e., project co-directors, senior leads, regional leads, and state leads employed by a national partner);
- Recruiting and maintaining a racially diverse staff across the state and national partners;
- Having a strategic plan and/or theory of change that reflects a racial equity analysis at the state and national level;
- Implementing racial equity into the governance of EEFA at the state and national level;
- Integrating racial equity into customary decision-making at the state and national level;
- Using conflict resolution skills and techniques to address concerns related to race at the state and national level; and
- Communicating priorities around racial equity at the state and national level.

Participants unanimously agreed that EEFA's performance on each issue was "partially demonstrated," indicating that survey participants noted room for improvement across the board. Additionally, more than a third of respondents described four areas as "not demonstrated":

- Having a strategic plan and/or theory of change that reflects a racial equity analysis at the national level;
- Integrating racial equity into customary decision-making at the national level;
- Using conflict resolution skills and techniques to address concerns related to race at the national level; and
- Using conflict resolution skills and techniques to address concerns related to race at the state level.

These are distinct opportunities for EEFA partners to become more adept at centering racial equity.

Respondents further explained their answers by answering an open-ended question following the ranking. Survey respondents distilled their rationale for responding the way they did to the following themes: racial equity is an afterthought, there is not diversity in leadership, states and national partners have limited interaction with one another, and state coalition interest in integrating racial equity is a driver for commitment. Participants felt that:

- Racial equity is talked about but is an afterthought in terms of driving real solutions, particularly at the national level.
- There is a lack of diversity within national-level leadership and a lack of integrating racial equity into the governance and decision-making processes.
- States and national partners have limited interactions with one another, restricting opportunity to collaborate on best practices.
- The degree to which focus is on racial equity integration exists in the work is dependent upon the interest of state coalition partners and not at the national level.

### ***Racial Equity Countering Practices – KHA Observations and REWG Conversation***

EEFA's national leads demonstrated white supremacy culture habits that constituted a fragile environment for BIPOC stakeholders to be actualized as fully vested leaders.<sup>7</sup> The most notable white supremacy culture habits observed by KHA through document review and data collection interactions are:

- quantity over quality and progress is bigger, more (e.g., \$769 million in increased funding available for retrofits in an initiative whose leaders admit to their limited conflict resolution skills among themselves and the local partners);
- power hoarding (e.g., concentrated decision-making among the four national partners and the number of FTEs housed at NRDC relative to the investment of similar infrastructure in the state and local organizations); and
- fear of open conflict (e.g., no action taken to address formally submitted concerns).

The executive leadership of the four national organizations excludes underrepresented Black, Indigenous, and People of Color (BIPOC) individuals, and greater inclusion of BIPOC individuals as state leads is a recent phenomenon.<sup>8</sup> Also, the representatives from the four national organizations in the REWG are not within the highest level of leadership in either their individual organizations or within EEFA itself. While these factors do not constitute an overt correlation with racial disparities in policies, practices, and procedures, research indicates the leadership deficit among BIPOC professionals in the nonprofit sector is produced and maintained by systemic racial barriers.<sup>9</sup>

In a fall 2020 letter to JPB in response to the initiation of the RRR process, the REWG highlighted challenges raised by the REWG that disproportionately apply to race because when conflicts arise within groups around race, which is historically and currently pivotal to housing policy in the United States, coalitions can devolve. The lack of flexibility and capacity to work on root causes with the right people is also related to race because the organizations that many partners mentioned as desired partners are BIPOC-led. In the fall of 2020, the REWG intended to turn its learning from the initial phase of its work with tools tested during the racial equity prototyping pilots into a resource for all the partners. However, the REWG has paused that activity pending the progression of the EEFA RRR process.

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<sup>7</sup> Kenneth Jones and Tema Okun, *Dismantling Racism: A Workbook for Social Change Groups* (ChangeWork, 2001).

<sup>8</sup> While underrepresentation can be field-specific, the National Science Foundation recognizes the following racial and ethnic groups as underrepresented in technical fields: Blacks or African Americans, Hispanics or Latinos, American Indians or Alaska Natives, Native Hawaiians, and other Pacific Islanders.

<sup>9</sup> In some organizations, BIPOC people reported feeling isolated and locked out of decision-making, and in other cases, they chose to leave organizations, which suggests that this one incident is a likely representation of what other, less well-resourced organizations are experiencing. The fact that BIPOC leadership exists in some well-funded philanthropic institutions may obscure the issues that drive these patterns underground. Frances Kunreuther and Sean Thomas-Breitfeld, *Race to Lead Revisited: Obstacles and Opportunities in Addressing the Nonprofit Racial Leadership Gap*, ed. Julia DiLaura (New York: Building Movement Project, 2020). LM Strategies, *The Exit Interview: Perceptions on Why Black Professionals Leave Grantmaking Institutions* (New York: ABFE: A Philanthropic Partnership for Black Communities, 2014).

There is not a readily accessible and well-communicated strategic plan, communications plan, nor theory of change that delineates the future direction of EEFA – both broadly and in the context of racial equity.

## **EEFA’S STRUCTURAL EFFECTIVENESS**

EEFA’s current structure, information sharing practices, and roles and responsibilities were discussed across the listening sessions, interviews, and survey. Coalitions and access to expertise were identified as areas that are working well within EEFA. Prioritization of racial equity, lack of community engagement, and lack of transparent communication were identified as elements of EEFA that hinder progress toward accomplishment of EEFA’s mission. State partners and national partners also identified leadership support and development and flexibility in repositioning initiative assets as areas for improvement within EEFA. State partners were especially uncertain about the effectiveness of leadership within EEFA and demonstrated this through their neutral responses to leadership-focused questions.

State and national partners also varied in their rating of effectiveness of approaches to participation and relationships within the EEFA initiative, with national partners being more likely to agree with the effectiveness of approaches compared to state partners.

State and national partners noted information sharing as an important role within EEFA and one that could use improvement. Partners demonstrated high motivation for information sharing, with weekly email communication deemed most appropriate. Last, partners identified the EEFA initiative as being siloed, with each national partner having a separate role with limited communication or collaborative decision-making across state and national partners.

In this section, data are presented in the following sections:

- Structural Effectiveness – Listening Sessions
- Structural Effectiveness – Interviews
- Structural Effectiveness – Survey
- Structural Effectiveness – National Partner Role Survey
- Information Sharing – Interviews
- Information Sharing – Survey
- Roles and Responsibilities – Interviews

### ***Structural Effectiveness – Listening Sessions***

During the November 2020 listening sessions, 90 partners and consultants discussed areas within EEFA’s structure that were working well as well as areas for improvement. These structural elements were posited using listening sessions, partner interviews, and survey. Coalitions and access to expertise were the two areas discussed most frequently, with the development of coalitions receiving mention much more frequently. Specifically, diversity among coalition members was identified as a leading aspect in being most effective when working toward a common goal.

In the listening sessions, partners also discussed the least effective aspects of EEFA. Listening session participants discussed lack of prioritization of racial equity, lack of community engagement, and lack of transparent communication as the least effective elements of EEFA. Based on these themes, prioritizing racial equity, community engagement, and transparent communication will support the betterment of the EEFA initiative.

### ***Structural Effectiveness – Interviews***

Interview participants also spoke to areas where EEFA's structure is working well and areas where improvement is needed. Thirty-six interviews of state partners, national partners, and consultants provided varying perspectives on EEFA's current structure. Energy Foundation was described as the supporter but also as an area of tension due to their lead role in the grantmaking process, while NRDC was viewed as leading the work, holding the power, and convening groups. Elevate Energy was described on a spectrum of involvement in the initiative; interview participants shared a range of assessments of Elevate, from seeing the organization as a decisive and considerate partner to being unsure or confused about Elevate's role. NHT was viewed as a partner that works well with the state coalitions despite not working well with a couple individual partner organizations and NEWHAB was discussed as a learning community, a place to convene and learn from one another.

Partners shared that they felt that some state leads were a successful aspect of EEFA, although some felt that the discussion around shifting more power to states has been stifled by the "guardrails of being told what they [states] have to do." While clear roles and areas of success were identified through the interviews, partners shared the complex nature of EEFA and the roles people play. Comments emerged about leadership, historical tension, and unevenness in scopes and budgets.

### ***Structural Effectiveness – Survey***

State and national partners discussed aspects of the EEFA structure that have been most effective. Statements included:

- Partner organizations work together to make the initiative's financial resources go substantially further.
- Partner organizations work together to coordinate initiative activities to avoid unnecessary duplication of efforts.
- Partner organizations work together to strengthen each other's advocacy efforts.
- People in leadership roles promote the involvement of a broad base of partners in the work of the initiative.
- People in leadership roles reposition initiative assets, competencies, and resources to address changing needs and priorities.
- People in leadership roles work to develop other leaders in the initiative.

State partners agreed with five out of the six statements focusing on various elements of EEFA's structure. However, state respondents were neutral in determining whether people in leadership roles



support the development of others into leadership positions. This is a clear opportunity for improvement within the EEFA initiative. National partners “agreed” and “strongly agreed” with most statements. National partners had mixed thoughts on the statement “People in leadership roles work to develop other leaders in the initiative” and were split between “neither agree nor disagree” and “strongly agree,” demonstrating an area for growth within the EEFA initiative. Though similar in their thinking, state partners were more spread out in their agreement with statements on EEFA’s effective structural elements.

Survey respondents further explained their ratings of the statements in an open-ended format. The following threads emerged through their comments:

- State: state partner funding transparency for pooling resources.
- State and national: more strategic leadership to support resource deployment.
- National: improved sustainability efforts.
- National: need for a broader base of community involvement in leadership opportunities.
- State: need to resource organizations at local levels that can truly lift up resources across the framework.
- National: need for flexibility in repositioning initiative assets to address changing priorities.

State and national partners identified leadership support and development, resource allocation, and flexibility as areas for improvement within EEFA. Participants felt that:

- Transparent funding across partners would be helpful for leveraging and pooling funding.
- Strategic leadership across states to leverage and more effectively deploy resources is desired.
- Grassroots groups should receive more, long-term funding to best invest in and drive projects.

Survey respondents also discussed effectiveness of approaches to relationships. Statements included:

- Partner organizations work together to establish positive relationships and strong links with community members whom the initiative wants to engage and mobilize.
- People in leadership roles establish positive relationships and strong links with community members whom the initiative wants to engage and mobilize.
- People in leadership roles facilitate positive relationships with other key players and stakeholders involved in the issues.
- People in leadership roles facilitate positive relationships with other key players and stakeholders involved in the issues.

State partners “agreed” and “strongly agreed” with most statements with the exception of the statement “People in leadership roles establish positive relationships and strong links with community members whom the initiative wants to engage and mobilize.” State partners “disagreed” with this statement, highlighting an area for improvement and the need for further examination of leadership in EEFA.

National partners “agreed” with most statements, except for the statement “People in leadership roles build respectful relationships between the coalition and the community,” which half of national partners “neither agreed nor disagreed” with. This neutral choice indicates an opportunity for improvement as it relates to improving upon the roles of leadership in the initiative.

Survey participants had the opportunity to discuss their responses to the statements. Comments included: there is room for growth in partnership and leadership support is needed. National and state partners shared a continued thread of leadership support and development. Participants felt that:

- Authentic community engagement is important, and best practices should be discussed across partners.
- Going through this process has allowed for people in leadership roles to build and continue to build respectful relationships between coalition members and the community.

Survey participants reacted to a series of statements related to the effectiveness of approaches to participation in EEFA. Statements included:

- Partner organizations encourage each other to actively participate in the initiative’s decision-making process.
- Partner organizations encourage each other to identify issues, analyze problems, select interventions, and evaluate interventions.
- Partner organizations have a sense of inclusivity that engages a variety of public and private individuals – from elected officials to community leaders and residents.
- People in leadership roles encourage partners’ active participation in the initiative’s decision-making process.
- People in leadership roles facilitate open communication within the initiative and with the initiative’s leaders.
- People in leadership roles facilitate a sense of inclusivity that engages a variety of public and private individuals – from elected officials to community leaders and residents.
- People in leadership roles work to engage a broad cross section of people to participate in the initiative’s work.

When discussing partner organizations encouraging one another to actively participate in the initiative’s decision-making process, state partners strongly agreed with the effectiveness of this approach. State partners strongly agreed with the following statements: “Partner organizations encourage each other to identify issues, analyze problems, select interventions, and evaluate interventions”; “Partner organizations have a sense of inclusivity that engages a variety of public and private individuals – from elected officials to community leaders and residents”; and “People in leadership roles encourage partners’ active participation in the initiative’s decision-making process.” State partners were neutral on the remaining three leadership-focused statements, demonstrating uncertainty about the effectiveness of leadership as they pertain to approaches to participation in the EEFA initiative.

For most statements, national partners “agreed.” The exception was with the statement “People in leadership roles facilitate a sense of inclusivity that engages a variety of public and private individuals – from elected officials to community leaders and residents.” For this statement, participants were evenly split between “neither agreed nor disagreed” and “agreed.” State and national partners varied in their ratings of the effectiveness of approaches to participation within the EEFA initiative. National partners were more likely to agree with the effectiveness of approaches compared to state partners.

Survey respondents had the opportunity to add comments to their ratings for statements. The emergent themes from the comments are that not all decisions are made collaboratively and that there is room for communication improvement. Participants felt that:

- Not all decisions on the project have been made collaboratively but should be, specifically team structure and staffing deployment decisions.
- There is room for improvement with trust-building, relationship-building, and communication.

### ***Structural Effectiveness – Document Review and KHA Observations***

Core to the EEFA RRR is the need to completely address well-established, long-standing, and documented concerns around power imbalances. After nearly eight years of operation, there has been no clearly articulated plan for the transition of the control and decentralization of EEFA from national organizations to state and local groups. Simultaneously, the budget for EEFA reflects two prominent concerns: 1) an opaque process and selection criteria for how funds are allocated among state and local partners and 2) a high concentration of resources in national organizations for staff who largely do not reside in the states where their work is focused. These concerns also have dueling, reinforcing impacts on EEFA’s long-term viability, sustainability, and effectiveness as an investment in local and state power building. Two studies on structural deficiencies are summarized here; some of the recommendations have been implemented.

Innovation Network for Communities (INC) report. In 2018, the Innovation Network for Communities (INC) assessed “EEFA’s efforts to (1) strengthen its collaborative approach and facilitative leadership and (2) address potential gaps and areas for improvement.” In sum, INC’s report delineated concerns about the management of EEFA with critical issues such as the use of power to maintain control over resources, lack of transparency and information sharing, limited pathways for state and local partner contribution to decision-making, and increased concentration of power over time among national partners.

Visioning. During the fall of 2019 and early winter of 2020, EEFA partners participated in a visioning process led by the consultant DIG IN. The purpose was to inform future directions for EEFA and NEWHAB. The process included a survey, interviews, and focus groups. The themes from the interviews were, in summary:

- EEFA participants honor where they have been but would like to explore investments needed for connections to related efforts;
- There is a growing focus on and interest in racial equity and resilience;

- It is not clear how to leverage success; and
- EEFA participants celebrate the EEFA team and leadership while recognizing additional knowledge, viewpoints, and skill sets might be needed.

The survey results showed that EEFA participants' visions for EEFA in five years were more energy-efficient affordable housing; a stronger, broader movement; [energy efficiency] industry centering of equity; and energy efficiency as a climate change mitigation strategy. Survey respondents also offered feedback on necessary changes, ineffective practices, and strategies that could improve EEFA's impact.

### ***Information Sharing – Interviews***

Current practices in information sharing within the EEFA network were discussed in partner interviews. NEWHAB was identified as the source of most information received by consultants, state, and national partners. They also were identified as being a great source for networking through their convenings. Biweekly meetings with national partners were also identified as a common information source for state and national partners. However, even with two forms of consistent communication, partners identified information sharing practices as lacking, especially about state-to-state communication.

### ***Information Sharing – Survey***

Information sharing is an important way for state and national partners to stay connected, share best practices, offer transparency, and support community. Information sharing was noted as an area for improvement throughout the listening sessions, partner interviews, and surveys. Survey respondents were interested in sharing various types of information across states, with the most frequently mentioned areas including “racial equity approaches,” “healthy partnership development,” and “local or state challenges.”

To improve communication, potential information-sharing practices were put forward by the interviewees and survey respondents for future use. Participants discussed the forward movement of EEFA communication. Most survey participants were either motivated or highly motivated to share information about their EEFA efforts across the initiative.

Partners were asked about the amount of time they were willing to spend on EEFA-related communication on a weekly basis. Responses were spread out relative to the number of hours participants were willing to spend on EEFA-related communication, with about a quarter thinking weekly communication would be too frequent, 31 minutes to 1 hour being an appropriate amount of time, or 1-2 hours per week being an appropriate amount of time to spend.

Partners also identified their preferred communication medium. Most respondents wanted to receive information through email, with LISTSERV™ communication and video-based meetings in second and third place, respectively.

### ***Roles and Responsibilities – Interviews***

Interview participants discussed perceptions of roles and responsibilities of organizations in the EEFA network. Interview participants identified the EEFA initiative as being siloed, with each national partner having a separate role with limited communication or collaborative decision making across partners.

Each partner was identified as having a specific role:

- NEWHAB as supporting racial equity in EEFA,
- NRDC as providing technical support,
- Energy Foundation as the financial provider,
- Elevate as the implementer,
- NHT as the expert intervener,
- State leads as the center of the work, and
- Two Brown Girls as the racial equity educators.

To better understand this structure, perceptions of power and control were discussed in the partner interviews. Interviewees saw national partners as holding the power, with specific focus on NRDC. They also saw the steering committee as being a location of concentrated power within the initiative. Conversely, there was a subset of interviewees who felt there was an intentional distribution of power throughout the initiative.

### **VISION FOR THE FUTURE OF EEFA**

The future of EEFA was discussed in the partner interviews and survey. State and national partners discussed shared values for a commitment to equity, transparency, inclusion, and community as characteristics most pivotal to EEFA's future. Partners shared ideas for critical elements for shaping EEFA's future. These included community-driven solutions, communication, trust, and the work supporting efficient, affordable housing. Future accomplishments partners would be proud of were also identified by state and national partners as community-driven solutions, removing energy burden from affordable housing, a broader connection to advocacy, and data showing progress in BIPOC communities.

Partners identified organizational needs to authentically contribute to the future vision of EEFA. These included financial resources, the initiative-supporting communities, leadership change, communication, and the support of The JPB Foundation.

Types of and specific organizations to be included in EEFA were also identified by state and national partners. Also, partners agreed that including community-facing organizations, tenant organizations, housing authorities, and environmental justice organizations will be important for shaping the future of EEFA. State and national partners identified diverse leadership, work done through a racial equity lens, and community engagement as key elements for a racially equitable EEFA five years from now. Overall, participants indicated a need for additional support and flexibility – some in the way of financial or

technical expertise support, and others in the way of expanding the network to include additional appropriate partners at the table to support the effort.

In this section, data are presented in the following sections:

- Future of EEFA – Interviews
- Future of EEFA – Survey
- Technical Support – Survey

### ***Future of EEFA – Interviews***

The future of EEFA was discussed in the partner interviews. Participants identified the following as elements for a successful future for EEFA: racial equity as part of the fabric; a bottom-up approach; a fuller roster of people at the table; BIPOC in top positions of leadership; shared power between states and national partners; a state-by-state approach; and community-driven leadership. Participants felt that:

- Racial equity is not an aside and should be interwoven into the fabric of the work.
- The work should be driven by people on the ground; a bottom-up, community-driven approach should be implemented.
- People with lived experience and technical expertise should be at the table.
- BIPOC individuals should be at the top in terms of leadership of the initiative.
- There should be a state and national power balance and shared resources.
- Each state should have a tailored approach based on the needs and the governance of that state.
- Leadership should come from the communities.

### ***Future of EEFA – Survey***

Survey respondents discussed value characteristics deemed most pivotal to EEFA's future. Transparency, inclusion, community, leadership, and equity were mentioned most frequently. Participants felt that:

- A well-defined internal and external commitment to equity is important for success.
- Trust, transparency, systems thinking, human-centered approaches, and racial equity are integral.
- Inclusivity should be intentional.
- Racial equity and community-driven strategies should be the focus.

Survey respondents discussed the importance of the value characteristics mentioned in the survey. Overarching themes noted as being critical elements for shaping EEFA's future included community-driven solutions; a need for the work to support efficient, affordable housing; better communication; and trust. Participants felt that:

- Intentional community inclusivity will help delegate and give power to the community.
- Reversing inequities that have existed and grown over the years needs to be prioritized for living in and benefiting from healthy, efficient, affordable housing.
- There is a need for better communication from national partners.

- Trust between national, regional, statewide, and community-based partners is critical to the success of EEFA.

Survey respondents discussed hypothetical future accomplishments they would be proud of. Emergent themes included: community-driven solutions, removing energy burden from affordable housing, a broader connection to advocacy, and data showing progress in BIPOC communities. Participants felt that:

- Creating a more democratic state, where communities have a say in what happens with the energy they use, would be something to be proud of.
- Removing the energy burden from affordable housing so costs/burden are no longer the make-or-break factor for affordable housing would be a huge success.
- Establishing a broader connection to climate and social justice advocacy could propel EEFA to greater inclusivity, community engagement, and progress toward the overall vision.
- Collecting and seeing data that show progress in BIPOC communities would be a success.

Survey respondents discussed their needs as they relate to contributing to the future vision of EEFA. Organizational needs to fully and authentically contribute to the future vision of EEFA were identified as: financial resources, initiatives supporting communities, leadership change, clear communication, and the support of The JPB Foundation.

Survey respondents shared the names of organizations they felt should be added to EEFA. Community-focused groups, housing groups, energy and environmental justice organizations, racial equity organizations, tenant rights groups, and Black-led organizations were suggested as organizations or types of organizations that should be added to EEFA.

Survey respondents identified elements of a racially equitable EEFA in five years. Diverse leadership, work done through a racial equity lens, and community engagement were identified as elements of a racially equitable EEFA in January 2026.

Survey respondents provided additional rationale as to why they chose the elements above. Racial equity, policies, leadership change, energy efficiency, and funding were elements identified as key to a more racially equitable EEFA in January 2026. Participants felt that:

- Changes to leadership are necessary, and a larger breadth of members and partners is needed to transform society to be more racially equitable.
- These elements are key practices that must be incorporated to create needed systems change.
- Advancing racial equity must be embedded into EEFA's culture in order to succeed.
- Members and partners need to have their expertise supported and tapped in to leverage the work being done.

Survey respondents discussed "the best" kind of funder and noted that the best kind of funder for EEFA would be flexible and engaged, a true partner, and a listening ear.

Survey respondents answered the question “What aspects of capacity building, coalition management, network weaving, racial equity expertise, and technical expertise will be necessary to the future of EEFA?” Participants identified the following themes related to each category:

- Capacity building aspects for the future of EEFA are: funding, training, partners, relationship building, and local involvement.
- Aspects of coalition management necessary for the future of EEFA are: support, structure, and diverse leadership.
- Necessary aspects of network weaving for the future of EEFA are: NEWHAB and movements.
- Racial equity aspects necessary for the future of EEFA are identified as: training, leadership, and centering the work.
- Technical expertise aspects necessary for the future of EEFA are: subject matter experts, community, and coalition support.

### *Technical Support – Survey*

Survey participants discussed the technical support needed to support engagement with impacted communities. More than half of respondents indicated that they did need something to further support their engagement with impacted communities. Participants were further asked to name the support they needed. Funding support, community engagement, and additional resources were the most frequently mentioned needs.

## Conclusion

While there are structural strengths (e.g., diverse state coalition membership and access to expertise), frequently noted areas for improvement included some of the fundamental areas present in strong coalitions and networks (e.g., leadership support/development, improved resource allocation, and flexibility). EEFA partners prioritized centering racial equity, engaging with community, and communicating in a transparent manner as means to better the EEFA initiative.

EEFA’s work remains crucial to increasing energy efficiency in multifamily affordable housing. The structure moving forward must be anchored in EEFA’s original vision, must amplify the voice and leadership of state and local partners, and must magnify BIPOC contributors as both beneficiaries of and critical anchors for the next stages of this body of work. EEFA partners have a clear vision for the future of the initiative, including pivotal values, what they need to accomplish this vision, and a description of a trusted funder. The described vision for the future looks very different from EEFA as it is currently constituted. Many EEFA partners are primed to make this shift during the reimagination phase of the RRR process.



## **PRINCIPLES FOR RESET, RESTART, AND REIMAGINATION**

A set of recommended principles for EEFA going forward emerged from the RRR assessment phase, prior assessments, and review of literature. These principles, while not completely missing in EEFA, can be greatly strengthened.

### ***Build Trust***

Trust is a cornerstone of any successful relationship. Incorporating some of the principles here (e.g., transparency, centering impacted community, etc.) will result in greater trust. An example of a way to build trust in a philanthropic relationship is the way funding is distributed. Flexible, multiyear funding allows organizations to plan appropriately and confidently and not expend valuable time on administrative tasks. It also demonstrates a level of trust between the funder and the grantee. This flexibility should come from the funder and any re-granter working on the funder's behalf.

### ***Employ Transparency***

Increased transparency in total EEFA funding available to the coalition and successful strategies used by other coalitions can bolster partners by helping them plan better as coalitions. As transparency and full disclosure are two different things, in some cases these partners do not want to know each individual organization's financial portion, just what the entire coalition must work with. In addition, partners should have multiple vectors to communicate about strategies directly and deeply. Last, increased transparency would ensure that partners understood the national decision-making processes about programming, performance measurement, and funding. If more transparency were applied throughout the initiative, everyone could plan better, and the inefficiencies created when people operate from assumption and rumor could be avoided.

### ***Center Impacted People and Communities***

EEFA's vision statement, The JPB Foundation's mission statement, and some EEFA partner organizations' mission statements all highlight who this work should benefit. EEFA partners embrace or are evolving to understand that the people the work is intended to benefit should be involved in leading and implementing the work. They are seeking ways to understand how to work with the people the work is for. If EEFA leadership focuses on building relationships within the network, seeking out relevant relationships external to the network, and centering Impacted people in leadership, strategy development, strategy implementation, and the measured outcomes, EEFA's vision of "[p]owerful coalitions of affordable housing, health, energy, environmental, and community leaders driv[ing] changes in policy and practice to ensure that all renters live in homes that are affordable and healthy" can be accomplished.

### ***Incorporate Racial Equity Holistically***

The range of participant knowledge, experience, and values as it relates to racial equity and EEFA is diverse. EEFA can become an initiative that centers racial equity in its work while respecting this diversity of experiences and approaches. Participants would like to see commitment and coordinated action across EEFA regarding racial equity, including appropriate conflict resolution, integration of racial

equity into customary decision-making, and a strategic plan that reflects a racial equity analysis. To varying degrees, some individual coalitions and the REWG are focusing on racial equity and can be resources for their peers.

### ***Honor and Amplify What Works***

EEFA members repeatedly highlighted work within the coalitions and access to expertise as aspects of EEFA that work well. The next iteration of EEFA should examine new ways to highlight the work of individual coalitions so all partners are aware of successful strategies and can learn. Partners noted a high level of desire to share in this manner. EEFA should also develop a more inclusive sense of what “expertise” is and ensure that members are constantly experiencing growth in areas where they might lack expertise. Partners noted technical and coalition management expertise as critical to this effort. Last, in centering racial equity, the group that is focused on studying and weaving racial equity through EEFA – the REWG – is a potential resource for their peers.

### ***Shift or Share Power***

To accomplish the EEFA mission most effectively, power should be shifted or shared. Currently, power and resources are centered with the national partners. Right-size the responsibilities of national partners, and a shift in power and control will follow. Partners provided clear thoughts on what right-sizing is needed for them to fully and authentically contribute to the future of EEFA: they need financial resources, explicit support for the community, a change in leadership, more communication, and demonstrable buy-in from JPB as the funder.

### ***Incorporate Best Practices of Networks (at Minimum) and Coalitions (if Indicated)***

Individual EEFA partner organizations and people should incorporate the best practices of networks and coalitions. Appendix J provides a review of coalition and network best practices. EEFA partners should be intentionally connected around aligned goals agreed on by all. They should also share knowledge and have a shared understanding of the systems targeted for change. In addition to general best practices, EEFA partners noted that two other elements – ensuring that NEWHAB has a role in network-weaving and ensuring that EEFA connects to other movements – are necessary parts of a successful EEFA network.

In addition to the network requirements, if a portion of EEFA operates as a coalition, membership should be diverse, and the coalition should engage in collective action. Resources, strategies, and practices should be shared and agreed upon across the coalition. Because EEFA is multi-sectoral at its core, any coalition work should only proceed upon employing people who can translate effectively between sectors. Incorporating these principles will result in an initiative with synergistic effects from the outset.

### ***Embrace Expansion***

An expanded frame could improve EEFA’s ability to be nimble and responsive. Partners provided examples of the types of organizations that should be sought; these examples included community-

focused groups, housing groups not focused on development (including tenant rights groups), racial equity organizations, environmental justice organizations, and Black-led organizations.

### ***Adopt a Posture of Continual Examination***

Once EEFA's objectives are (re)affirmed, in order to center equity, the initiative should adopt a posture of continual examination of its membership composition, distribution of power, distribution of resources, leadership development, relevance of social change agendas, and utility of current commitments. As much attention should be paid to these "means" as is paid to the "ends."

### ***Develop Standards of Practice for the Funding Ecosystem***

During the RRR, there is an opportunity for the participating partners and The JPB Foundation to agree upon standards of practice for the different actors in the EEFA funding ecosystem. Some are already contained in grant agreements. Appendix K provides examples of each actor's potential rights and responsibilities. KHA compiled these examples from existing EEFA partner rights and responsibilities, KHA's historical experience with philanthropy, publications about funder/intermediary/grantee relationships, prior recommendations from EEFA consultants, and partner descriptions of the vision for the future of EEFA.<sup>10</sup>

## **Strengths and Limitations**

As with any engagement, KHA encountered strengths and limitations. Below are each, their impacts, and attempts to mitigate impacts of the limitations.

### **STRENGTHS**

#### ***Overall Design***

The overall design and openness of JPB to new ideas allowed KHA the flexibility to create an experience that generated some of the experiential outcomes and data to inform the steps needed to accomplish the strategic outcomes.

#### ***Consistency of Interviews***

Interviewers adhered to the time and protocol allotted for the interview process.

#### ***Generalizability to EEFA Network***

Because they are based on participation in listening sessions, interviews, and the survey, responses can be generalized.

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<sup>10</sup> "The Donor Bill of Rights," Association of Fundraising Professionals (AFP), accessed May 11, 2021, <https://afpglobal.org/donor-bill-rights>; Engage R&D, Equal Measure, and Harder+Company Community Research, *Weaving Successful Partnerships: When Funders, Evaluators, and Intermediaries Work Together*, Equal Measure, 2020, <https://www.equalmeasure.org/wp-content/uploads/2020/04/8-Weaving-Partnerships-Report.pdf>.

### ***Data Analysis Consistency***

NVivo, SurveyMonkey, and Excel were used to analyze the data collected through listening sessions, interviews, and the survey. Consistent methodology was used to analyze both the quantitative and qualitative data collected through this process.

## **LIMITATIONS**

### ***Timing***

This engagement was timed to be responsive to issues that crystallized in September 2020. However, it coincided with an ongoing global pandemic, multiple holidays, the time many state coalitions were finalizing their plans for the coming year, and state legislative sessions to which many participants needed to be attentive. Mitigating activities included adding listening sessions and extending time for interviews and response to the survey.

### ***Number of Assessments and Inquiries***

This is the most recent in a set of assessments and inquiries related to EEFA's structure and direction. While all build on and complement each other, it is possible that by the end, several participants were fatigued. If that is the case, it limited the experience and the data collected to inform the next steps.

### ***Low Interview Participation Rate from Some Coalitions***

In California, Michigan, Minnesota, and New York less than 50% of organizations participated in the interviews. These four states account for 24 of the 47 (51%) JPB EEFA funded organizations. While targeted outreach in January resulted in an interview in Minnesota, that same outreach did not increase participation from the other three states.

### ***Consistency of Interview Protocol***

The protocol was shortened after the interview process began to reduce interview time.

### ***Survey Individual Question Response Rate***

While 43% of invited survey participants completed the survey, there were instances throughout the survey where up to 41% of survey respondents skipped a question.

## **KHA Background**

Keecha Harris and Associates, Inc. (KHA), is a national consulting firm and 8(a)-certified and woman-owned business based in Birmingham, Alabama. KHA leads organizational development, project management, and research and evaluation projects for publicly and privately funded efforts across a broad range of topics. Since 1999, KHA has engaged foundations representing more than \$280 billion (~26% of the total \$890 billion) in U.S.-based philanthropy assets.

KHA is currently curating a multiyear racial equity leadership development initiative for foundation executives – The Presidents’ Forum on Racial Equity in Philanthropy. The forum offers a space for executive leaders to explore the leadership challenges and responsibilities involved in facing and addressing racial and ethnic equity. KHA also facilitates a professional development series – Inclusion, Diversity, and Equity in Environmental Philanthropy (InDEEP) – that has convened more than 300 public and private grantmakers. The firm co-cultivated the resources for the \$36 million annual Democracy Frontlines Fund (DFF).

One EEFA national partner organization, Energy Foundation, has participated and invested in both the Presidents’ Forum and InDEEP. Given that this relationship has neither been focused on Energy Foundation’s internal culture nor its field-facing efforts, The JPB Foundation was satisfied that there is no conflict of interest, having deemed KHA’s contributions to EEFA’s redesign to be a natural outgrowth of the aforementioned bodies of work. JPB contracted KHA, a firm committed to racial equity and rooted in transparency, integrity, and accountability, to support realignment of the governance and structure of EEFA. KHA’s work is grounded in equity and aims to assist philanthropic clients in developing strategies that prioritize grantmaking and investments in Black, Indigenous, and people of color (BIPOC)-led organizations and communities.

# Appendices

***Appendix A. State Partners***

***Appendix B. Groundswell Letter (2020) to Energy Foundation***

***Appendix C. JPB Letter to Partners***

***Appendix D. PSE Letter (2018) to Energy Foundation***

***Appendix E. PSE Letter (2020) to Energy Foundation***

***Appendix F. Interview Protocol – Partners***

***Appendix G. Interview Protocol – Consultants***

***Appendix H. Survey Protocol***

***Appendix I. Listening Session, Interview, and Survey Data***

***Appendix J. Network, Coalition, and Movement Overview***

***Appendix K. Funding Ecosystem Example***

## **Appendix A. State Partners**

## EEFA State Coalition Partners

State Coalition	Partner Organizations	Role in Coalition
California	Natural Resource Defense Council	State Lead
	California Housing Partnership	Member
	California Environmental Justice Alliance	Member
	Greenlining Institute	Member
	Association for Energy Affordability	Member
	Los Angeles Alliance for a New Economy (LAANE)	Member
	Asian Pacific Environmental Network (APEN)	Member
	Communities for a Better Environment (CBE)	Member
	National Consumer Law Center	Member
	Strategic Actions for a Just Economy (SAJE)	Member
	Strategic Concepts in Organizing & Policy Education (SCOPE)	Member
	National Housing Law Project	Member
	Physicians Scientists & Engineers for Healthy Energy	Member
Georgia	Southface	State Lead
	Hummingbird	State Coalition Manager
	Georgia Watch	Member
	National Housing Trust	Member
	Groundswell	Member
	Partnership for Southern Equity	Member
Illinois	People for Community Recovery	State Lead
	Citizens Utility Board	Member
	Community Investment Corporation	Member
	Elevate Energy	
	Midwest Energy Efficiency Alliance	Member
	Natural Resource Defense Council	Member
Louisiana	Alliance for Affordable Energy	State Lead
	Housing Louisiana	Member
	National Housing Trust	Member
	Natural Resource Defense Council	Member
	Greater New Orleans Housing Alliance	Member
	Green Coast Enterprises	Member
Maryland	Natural Resource Defense Council	Co-State Lead
	National Housing Trust	Co-State Lead
	American Council for an Energy-Efficient Economy (ACEEE)	Member
	Maryland Building Performance Association	Member
	Maryland Sierra Club	Member
	Montgomery County Green Bank	Member
	National Consumer Law Center	Member
	Northeast Energy Efficiency Partnership	Member
	Earthjustice	Member
	Green and Health Housing Initiative (GHHI)	Member
	EcoWorks Detroit	State Lead



## EEFA State Coalition Partners

State Coalition	Partner Organizations	Role in Coalition
Michigan	Ecology Center	Member
	Elevate Energy	Member
	Michigan Environmental Council	Member
	Michigan Environmental Justice Coalition	Member
	Midwest Energy Efficiency Alliance	Member
	National Housing Trust	Member
	Natural Resource Defense Council	Member
	Soulardarity	Member
	Midwest Energy Efficiency Alliance	Member
Minnesota	Community Stabilization Project	Co-State Lead
	Fresh Energy	Co-State Lead
	Inquilinxs Unidxs por Justicia	Member
	Minnesota Housing	Member
	Midwest Energy Efficiency Alliance	Member
	National Housing Trust	Member
	Natural Resource Defense Council	Member
Missouri	Renew Missouri	State Lead
	National Housing Trust	Member
	Natural Resource Defense Council	Member
	Tower Grove Neighborhoods Community Development Corp.	Member
	Midwest Energy Efficiency Alliance	Member
New York	Association for Energy Affordability	State Lead
	Community Preservation Corporation	Member
	Enterprise Community Partners	Member
	Pace Energy & Climate Center	Member
	Natural Resource Defense Council	Member
	Green and Health Housing Initiative (GHHI)	Member
	WE Act for Environmental Justice	Member
North Carolina	Natural Resource Defense Council	State Lead
	National Housing Trust	Member
	NC Housing Coalition	Member
	NC Justice Center	Member
Pennsylvania	National Housing Trust	Co-State Lead
	Natural Resource Defense Council	Co-State Lead
	ACTION Housing	Member
	Housing Alliance of PA	Member
	Keystone Energy Efficiency Alliance (KEEA)	Member
	Pennsylvania Utility Law Project	Member
	Regional Housing Legal Services	Member
	Virginia Poverty Law Center	State Lead
	Appalachian Voices	Member
	Community Housing Partners	Member

## EEFA State Coalition Partners

State Coalition	Partner Organizations	Role in Coalition
Virginia	Dominion Due Diligence Group	Member
	Efficient Home	Member
	Faith Alliance for Climate Solutions	Member
	National Housing Trust	Member
	Natural Resource Defense Council	Member
	project: HOMES	Member
	Sierra Club	Member
	Viridiant	Member
	Virginia Energy Efficiency Council	Member
	Virginia Housing Alliance	Member

## **Appendix B. Groundswell Letter (2020) to Energy Foundation**



**DATE:** September 14, 2020

**TO:**

**CC:**

**RE:** Energy Efficiency for All Initiative – Georgia  
June 2019 – September 2020 Report, Overriding Concerns

### **Overriding Concerns**

Groundswell has been a member of the EEFA GA coalition for more than three years – and while we value our relationship with the Energy Foundation and our many local colleagues and the good work that’s been accomplished in service to our neighbors – the function of the EEFA GA coalition is not in alignment with Groundswell’s values nor with goals and principles that the coalition itself purports to uphold. Specifically, despite the inclusion of racial equity as central to the EEFA GA vision statement, EEFA GA and its regional and state leadership have continued to systematically marginalize Partnership for Southern Equity (PSE), which is a critically important regional leader, has continuously contributed substantial capabilities to the technical and engagement goals of EEFA, is the only Black-led organization in the coalition, and which holds racial equity as its central mission. Furthermore, EEFA GA has not supported PSE’s Just Energy Summit, which is largest in attendance and most comprehensive in geographic scope energy equity program in the state. Moreover, the leadership of the coalition is not aligned with its stated vision and values, and the behavior of coalition members towards Coalition Manager [REDACTED] has been characterized by an unacceptable racial dynamic that has been disrespectful of her leadership on multiple occasions. Examples of the preceding include:

- **Marginalization and Competition with Partnership for Southern Equity and the Just Energy Circle:** The EEFA GA coalition “Principles of Partnership” includes a vision statement to advance “a racial equity-centered approach” to its work. In contrast to this vision statement, EEFA GA has systematically marginalized PSE’s work over multiple years. Examples include:
  - **Regional and State Leadership:** While EEFA GA states that racial equity-centered work is its vision, the state leadership is represented by a white-led organization and the regional leadership is also white from an organization with no presence in the region. All the while, PSE – a Black-led organization whose mission is racial equity and which is an anchor institution in the region – has been continuously marginalized. I have personally raised this issue both on email and in coalition meetings, proposing that EEFA GA partners should recognize this misalignment and ask PSE, as our partner whose mission is racial equity, if PSE would lead the coalition. After much discussion, some of which yielded positive recognition that committing to racial equity would take work on the part of all of our organizations, no action was taken to ask PSE if they would be willing to lead. Both the State Manager and Regional Director were silent on the question during the discussion.

- Lack of recognition and support and engagement in PSE’s Just Energy Summit: While PSE has continuously contributed to EEFA GA and partner activities, EEFA GA has not supported The Just Energy Summit – which is the largest energy equity organizing event in the state – despite the fact that PSE has continuously made room at the Summit and at Circle events to support EEFA GA and its members. For context, the Just Energy Summit draws more than 200 participants, while the EEFA GA Energy Equity Forums draw fewer than 20 participants.
- Presenting programming, including EEFA GA-branded Energy Equity Forums, that are entirely duplicative of and competing with PSE’s Just Energy Circle and Summit. I have personally raised this as a concern in multiple coalition meetings and in comments in the coalition work planning document. My concerns have been met by silence, a rigid defense of EEFA GA-branded programming, or by the assertion that it was up to PSE to make the case if EEFA GA programming was duplicating the Just Energy Circle – which they have. PSE staff have frequently noted that the Just Energy Circle is already doing work proposed or pursued by EEFA GA, at which points the EEFA GA coalition had the opportunity to align in support of PSE’s existing activities – leveraging our efforts in line with stated EEFA values instead of duplicating and competing work. Notably, both the State and Regional Managers have defended the duplicative activities. Requiring a partner to defend, rather than engaging from a posture of support, seems a further violation. Finally, duplicating and competing rather than aligning and supporting ignores the needs of the people the coalition engages. The depth of programming presented through the Just Energy Circle offers people a ladder of engagement that equips them to become advocates and leaders on energy equity as a part of a larger community that has organizers across the state. The EEFA GA Energy Equity Summits have no such programming available.
- Competing directly with PSE. Early versions of the EEFA GA workplan included committing partners to raise additional funds for EEFA GA to advance racial equity-centered activities outside those activities funded by Energy Foundation – which would have directly competed with PSE. These internal aggressions are mirrored in how EEFA GA presents itself publicly. The EEFA GA public web presence describes its mission as being a “meeting ground for Georgians... on energy equity issues in their communities,” which is duplicative of PSE’s Just Energy Circle’s purpose of “convening technical experts, advocates, and community members to vision more equitable energy policy and co-create clean energy solutions that benefit everyone.”
- Dominance of [REDACTED] GA Watch’s negative and aggressive stance in coalition function. The highly negative relationship dynamic between [REDACTED] Georgia Watch towards [REDACTED] PSE has been acknowledged publicly in coalition meetings. To the contrary of the multiple facilitator-led sessions that EEFA has supported to improve this dynamic, and to the contrary of the Principles of Partnership, [REDACTED] has continuously leveraged the activities of the EEFA GA coalition to expand her scope, demand support from partners, and to compete with PSE. [REDACTED] aggressive approach with regards to the coalition and specifically competitive approach towards PSE has



- dominated coalition dynamics and has remained unaddressed. Moreover, Liz has been supported by the Regional Director in her actions. The lack of direct accountability for these behaviors over multiple years is a further mechanism by which PSE has been devalued and marginalized, with the implicit support of EEFA national partners.
- Disrespectful behavior towards [REDACTED]. While I appreciate that [REDACTED] is a leader, is the Founder and CEO of her own firm, and is an executive who has confronted these behaviors herself on multiple occasions to my knowledge – I must bear witness to a pattern of behavior from multiple coalition members in which [REDACTED] has been treated like an administrative assistant, and rudely at that, rather than as a valued peer and colleague. [REDACTED] has been challenged about taking proper notes, providing reporting, providing agenda, scheduling meetings, and tasked over email, on the phone, and in meetings in a way that fail to recognize her substantive leadership of and contribution to the group. There is an undeniable racial aspect to these behaviors. In all instances that I or other members of the Groundswell team have witnessed, the persons treating [REDACTED] disrespectfully have been white. This pattern is consistent with the systematic marginalization of PSE.

### **A Path Forward**

What we do is who we are.

By that measure, and from our experience, the EEFA GA coalition does not function as a coalition, does not live up to its vision or principles, and the history of aggressive and competitive behavior that has systematically marginalized PSE and failed to recognize and engage with [REDACTED] as a leader as Coalition Manager indicates that the coalition in its current form should not be continued.

Partnership for Southern Equity is the anchor institution in Georgia and in the Southeast for energy equity. Any path forward in Georgia should recognize their leadership and impact, and therefore operate in support of the Just Energy Circle, with each organization's capabilities and talents supporting the juggernaut they are building to change Georgia and the South.

While Groundswell's engagement in EEFA has been focused solely in Georgia, we would further encourage EEFA to reexamine regional leadership within the Southeast. Change comes from within, PSE represents powerful Black Southern leadership, and it is contrary to the mission to place white people from outside the region in a leadership role over Black regional leaders – leaders who have long been advancing equity across the region. External experts can contribute their expertise without being in charge. There is a clear imperative to follow the lead of people already doing the good work.

There is no doubt that there is good and very important work to be done, and there has never been such a pivotal time in our generation. It must, however, be pursued with a level of integrity that is worthy of our ideals. To that point, and from a very personal perspective, I have been ashamed of how EEFA GA has operated this past year. I would, however, be proud to lend Groundswell's capacity, technical capabilities, and extensive network of relationships to support the mission and equity and justice goals of EEFA in close alignment and with the state, and preferably regional, leadership of Partnership for Southern Equity.



We have accomplished good works this past year. We have implemented the LaGrange SOUL (Save On Utilities Longterm) Program, successfully implemented a pivot to engage EETility to be able to move quickly given the urgent desire of the City to move forward to deliver relief to residents, worked with the Mayor to secure an additional \$550,000 in Callaway Foundation funding for Southface to complement \$550,000 in energy efficiency with grant-funded healthy home improvements, and will deliver a total of \$1.1 million in energy efficiency and health home improvements for residents. We partnered with Destination Design School (Founder and Principal, Euneika Rogers-Sipp) to deliver "Our Future Home" workshops for children and families and to help place our work in energy efficiency within a reparative justice framework that is the hallmark of Destination Design School's work. And we have been all-in. Groundswell's commitment has exceeded our funded activities by more than 70 percent to get the good work done in a very challenging operating environment because that's what it's taken to serve the people.

When we look towards the future, we see the potential to apply what we are learning together about deeply connecting energy efficiency programming with equity and reparative justice to many more small town and rural communities throughout Georgia and across the South. To do so with integrity, however, it must be in coalition with organizations that practice what they preach, because what we do is who we are.

I hope that you all will receive this report in the spirit in which it's offered. As the CEO of Groundswell and as a native Georgian, I can see the future that is possible and many pathways to build it. But we can't get there the way EEFA GA has been working, and we can't do it with leaders and coalition members who aren't willing to be led by people who represent the communities we say we're there to serve.

With gratitude for your consideration and with anticipation of a just resolution,



## **Appendix C. JPB Letter to EEFA Partners**



October 28, 2020

**Re: Reset, Restart, Reimagine: Energy Efficiency for All (EEFA)**

Dear EEFA National Partners, NEWHAB, State Coalition Members, Local Partners and Consultants,

The purpose of this letter is to further put into context our intention to improve the effectiveness of the EEFA structure. Our goal is to support a path for EEFA's national and local partners that justly distributes power and resources. We are optimistic that this can be achieved, but it will take time, intentionality, and hard work. We invite you to participate with us in this process.

JPB supported the launch of EEFA in 2013. Since then, EEFA has increased available funding from utility companies and energy offices by \$769M to provide more comfortable, healthy, efficient and affordable homes for hundreds of thousands of people. The JPB Foundation recognizes that these funding wins build upon work done prior to EEFA's formal launch and are the direct result of your collective efforts.

Unfortunately, these gains have come, in part, at the cost of trust across the network. We recognize that the governance and structure of EEFA has been a challenge for some time and issues persist related to power imbalances, coalition management, and lack of transparency. During this period of heightened awareness, we are preparing to address long-standing concerns around race, equity, and justice in EEFA.

Our net intention is to listen deeply to all EEFA contributors and collectively develop a way forward that strengthens relationships across the coalition. Our belief is that future EEFA policy gains be backed by a system that upholds its partners with dignity, respect, transparency, and mutuality. Our plan is to partner with you to make this a reality.

We seek to systemically address these issues by charting a new path forward with all local and national partners. Specifically, our vision is a realigned EEFA with a structure for governance and accountability that brings about more equitable distribution of power through a racial equity lens. We see the future of EEFA being anchored in shared intentionality among all partners, using inclusive practices, aiming to deepen relationships with community partners from an assets-based approach, and investing to build a culture of mutuality and respect.

In terms of next steps, in the coming weeks, JPB will provide grant funding to support your participation in this process as well as to continue important local activities. JPB will be conducting a series of listening sessions, interviews, a survey, and other activities to support our intentions for this journey.

We hope that each of you are willing to consider contributing your time, energy, and thought partnership in this process as our national, state, and local partners. We acknowledge that this work will commence amid a pandemic and the aftermath of the national election. We will make every effort to be responsive to the uncertainties of the times.

Relationships matter. We are deeply saddened and regretful to find ourselves in this place. Because of this, we want to be a reflective and engaged partner in the reset of EEFA.



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t. 212.935.9860 f. 212.446.6791 [jpbfoundation.org](http://jpbfoundation.org)

The months ahead are an opportunity to contribute to reimagining the EEFA model. JPB has secured Keecha Harris and Associates, Inc (KHA) to design this process and lead us on a path to change systems, structures, and control. We intend to implement a process that leans into JPB's values of promoting justice, building agency, collaboration, and field building while employing a restorative approach to the goals of EEFA.

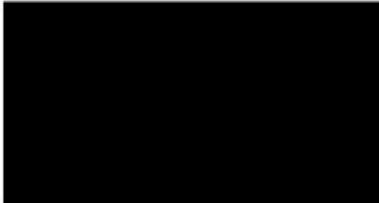
Sincerely,



## **Appendix D. PSE Letter (2018) to Energy Foundation**



March 27, 2018



Dear [REDACTED]

The Partnership for Southern Equity (PSE) deeply values its relationship with the Energy Foundation (EF) and the important goals of the EEFA project, and is appreciative for the opportunity to have worked together towards our shared energy equity goals in Georgia. As our funding status with EF is re-evaluated, so must PSE assess the value of its role as an EF grantee partner within the EEFA GA coalition. A primary aspect of this assessment includes an evaluation of the nature and dynamics of the work currently undertaken by the EEFA GA coalition.

A fundamental underpinning of PSE's theory of change is that transformational policy change within deeply entrenched systems of oppression and discrimination will only become real through the self-determination and will of communities exercising their collective civic rights. In the context of national initiatives such as EEFA, this becomes possible by building trust with target communities through an extended relationship-building approach, and allowing the work of change to flow and grow through those relationships. A transactional approach by which outside organizations come into a community to perform an event hoping to inspire action, without first building a relational foundation, has long proven unsuccessful for lasting policy change particularly in the American South. The understanding of how to embrace and implement this approach for lasting change is an integral part of the value that PSE brings to the EEFA GA coalition.

Unfortunately, as PSE has worked to translate this theory of engagement to support EEFA Georgia efforts, one coalition member has resisted this approach. It has now gone so far as to intentionally exclude PSE from the planning and delivery of multiple coalition events, and to completely omit mention of PSE as a coalition member in marketing materials and communications. It should be noted that this behavior has been tolerated by EEFA GA coalition administration. PSE has always embraced inclusive partnerships in its words and its actions, including bringing strategic partnerships and intellectual capital to the coalition.

Under these circumstances, what should be acts of sharing for mutual benefit has become an intentional and damaging co-opting of PSE's contributions and reputation within Georgia's Energy Equity political landscape.

Just as work with communities depends on building trust, so does work within group collaborations such as the EEFA GA coalition. The activities of this coalition member would undermine collaborative principles under any circumstances, but the targeted nature of them towards PSE is particularly corrosive. According to an internally developed evaluation tool, PSE now regularly assesses its programmatic partnerships to evaluate progress towards established goals within each project itself, as well as within the long-term trajectory of the organization. Because building an equity ecosystem connected by trust is our goal, the quality of built relationships and the trust of PSE's commitment by communities in which we work are critical metrics. What we leave behind matters. It is now time to assess our role within the EEFA GA coalition, and whether our continued participation might bring mutual benefit to all parties involved.

Because we value the goals behind the work of EEFA and fully support its success, we offer a few observations for consideration, in the interest of healthier collaborations:

- Building trust within collaborative coalitions and with target communities is critical.
- Collaborative covenants which frame rules of engagement within a coalition must be enforced after they are drafted and ratified.
- Actions by coalition members which diminish or demean other members must not be tolerated.
- National EEFA partners must hold the integrity of the coalition building process and the reputations of member organizations in high esteem.
- Coalition building efforts must begin with the end in mind. A clear vision must be crafted for long term impact and institutional support after the lifecycle of the effort has ended, and coalition work must be guided by that vision.

Regardless of these circumstances, please know that PSE will always share with the Energy Foundation a current mutual goal of equitable access to affordable, clean energy for low-income families and communities of color, and will continue to explore and pursue opportunities by which these goals can be advanced across the American South.

Thank you for your support, and I look forward to following up with you soon,

[REDACTED]

## **Appendix E. PSE Letter (2020) to Energy Foundation**



September 8, 2020



Dear 

For approximately the past six years, the Partnership for Southern Equity (PSE) has genuinely and consistently supported the goals of the Energy Efficiency for All (EEFA) project. The opportunity to work towards our shared energy equity goals together – in Georgia and nationwide, has brought great perspective to our own energy equity leadership in a rapidly evolving and expanding space. PSE deeply values its relationship with the Energy Foundation. However, instead of initiating renewal conversations, we are exercising our option to “Exit the Partnership” as stated in Item 7 of the EEFA Georgia coalition’s Principles of Partnership. This item states that *“Core Partners may withdraw from the Coalition at any time. Withdrawal does not impact the standing grant agreement between the Partner and the Donor (Energy Foundation) for the remainder of the contract. Funding in the next grant cycle will be reconsidered by the Donor as a result of the withdrawal.”*

The primary drivers of this decision include (1) the trajectory of PSE’s Just Energy Circle, (2) the ongoing evolution of EEFA’s National Agenda, and (3) the divisive dynamics of the EEFA Georgia coalition.

1. The trajectory of PSE’s Just Energy Circle (JEC) – The JEC has been a coalition committed to support of EEFA Georgia since its inception. Historically, all the EEFA Georgia coalition partners have been members or invited participants of the JEC. Two EEFA Georgia coalition partners have served as executive committee leadership for multiple years. JEC partners collaborated with EEFA Georgia to execute energy equity education events across the state of Georgia. This includes educating JEC members that were not familiar with EEFA by inviting our EEFA Georgia state lead to present on the mission and activities of EEFA. We have also connected PSE’s Just Growth Circle (JGC) that focuses on equitable development and affordable housing to the work of EEFA Georgia. Of note, there are JGC member organizations that collaborate with EEFA Georgia through the Multifamily Advisory Council (MAC) convened by Southface as an EEFA Georgia project.

We have consistently made connections to EEFA and attempted to elevate and incorporate EEFA goals, particularly on the municipal and community engagement and education front. However, we received minimal support or interest in return when proposing paths for EEFA inclusion led

by PSE. One notable expression being PSE's 2018 Just Energy Summit and the lack of support from EEFA staff. As we prepare to forge ahead, PSE's focus must remain on the growth and stability of its longest running racial equity coalition, the Just Energy Circle.

2. The ongoing evolution of EEFA's National Agenda – Since at least early 2018, EEFA has initiated a path to lead with racial equity and underwent an extensive rebranding. As a Black-led racial equity organization convening its own long-running coalition focused on the intersection of energy and structural racism, this shift in priorities and its ultimate rollout was confusing and further destabilizing for an already rocky coalition footing. Particularly at a time when at the state level, PSE was being intentionally erased from coalition activities through means such as exclusion of our organization in promotion of coalition activities, the defunding of our organization as a coalition grantee while being expected to continue participating in EEFA Georgia coalition activities and promoting the EEFA mission.

Additionally, the impact of what EEFA, and NEWHAB, were exploring was weighed down by the cumbersome, top down structure of EEFA. This also mired communications and left a support vacuum when structural alignment that could have bolstered our state coalition health was needed most. Finally, seeing the foundations of the EEFA/NEWHAB “equity manifesto” grounded in the shared visioning and values development process that PSE elevated, without acknowledgement when EEFA Georgia was originally initiated, left us confused and unsure of our place in the work. These occurrences, and others made the relationship with EEFA feel extractive. It was as if, even though our focus was racial equity before EEFA was created, our only value was as a token support of the EEFA vision and state coalition.

3. The divisive dynamics of the EEFA Georgia coalition - A transactional approach by which outside organizations/entities descend into a community to perform work hoping to provoke systemic change without first building a relational foundation, has long proven unsuccessful for lasting systems change - particularly in the American South. The understanding of how to embrace and implement this approach is an integral part of the value that PSE has brought to the EEFA Georgia coalition. While these values have driven some positive work at the national level and with specific Georgia coalition partners, we continue to push against a brick wall. Our ability to “move change at the speed of trust” is seen as not delivering on the work because the very people we are supposed to trust are consistently unsupportive and driven only by the protection and elevation of their own work. Work that is very often, intentionally in direct conflict with PSE and its theories of change and engagement.

Despite EEFA Georgia's Principles of Partnership, EEFA regional staff has reinforced the bad behavior of coalition partners versus working to correct it. This has inflicted an all too familiar trauma that Black-led, frontline-organizations and communities experience when working with white-led organizations. The reputation and work of Black-led, community-based organizations are used to legitimize “new” efforts while showing little respect for the work that preceded their engagement. As a Black man leading the only Black-led organization in the state coalition, and as





a leader of a team of Black and women of color leaders, I have felt much strain for continuing to subject them to the unnecessary marginalization of the work we are passionate about and bring our full selves to. As we discussed in our December 2019 quarterly meeting, it pains us to join a table supposedly committed to advancing racial equity when the staff hired to advance this work and the culture of EEFA have displayed the same characteristics as the institutions EEFA is supposed to be organizing against.

PSE has always embraced inclusive partnerships in its words and its actions, including bringing intellectual capital and strategic partnerships to bear for the coalition. Because growing an equity ecosystem connected by trust is our goal, the quality of built relationships and the trust of PSE's commitment by communities in which we work are critical metrics. What we leave behind matters.

While PSE will no longer be a formal EEFA Georgia coalition partner, we remain in full support of EEFA's vision and wholeheartedly believe that "Powerful coalitions of affordable housing, health, energy, environmental, and community leaders [can] drive changes in policy and practice to ensure that all renters live in homes that are affordable and healthy." We hope that our departure will help to generate dialogue locally and nationally about the importance of keeping people at the center of the work and supporting foundation-led efforts in ways that show a commitment to racial equity in policy, operations, and culture.

Respectfully,

[Redacted signature block]

Partnership for Southern Equity

## **Appendix F. Interview Protocol - Partners**

## Reset, Restart, Reimagine:

### EEFA-Funded Partner Interview Protocol

**Purpose:** To hear from each EEFA partner about the initiative's governance, racial dynamics, and potential ways forward.

<b>Interviewee(s)</b> (names and roles)	
<b>Organization</b>	
<b>Contact Information</b> (email and phone)	
<b>Background Information</b> (e.g., <a href="#">state priorities</a> , if applicable)	

**Opening Statement:** Good morning/afternoon (*based on interviewee org's time zone*). I am Carmen Simon/Leslie Reynolds/Mikhiela Sherrod, a consultant/strategy, evaluation, and learning associate/manager with Keecha Harris and Associates, the firm working with JPB to realign the governance and structure of Energy Efficiency for All (EEFA). The net intention for this process is that the future of EEFA will reflect a more equitable distribution of power using a racial equity lens.

Today's conversation is the second of three components of the assessment phase of the EEFA reset journey. During the first stage, EEFA national and state partner organizations and consultants participated in a series of 12 listening sessions designed to put into context why the EEFA reset was a necessity; discuss power, governance, and equity; and share planned activities for the reset period.

Between now and early January, we will interview each EEFA partner organization to gain your perspectives on EEFA's governance and racial dynamics. We are asking you to share concrete descriptors of what is needed to move the initiative forward. Your insights will influence our governance and structure recommendations. The third way that we will seek your input will be via an online survey that will be sent to all EEFA national, local, and state partners in January.

Our conversation today is expected to last approximately 60-75 minutes. Please note that this interview will be recorded for note-taking purposes. Data will be shared at the aggregate level. Your individual level input will be kept anonymous. Please be candid in your response and assured that what you share will be handled with great care for protecting your identity.

Do you have any questions for me before we get started?

#### Opening Questions (12 - 22 minutes)

- 1) There has been a long-standing effort to improve residential energy efficiency. EEFA started formally in 2013. When did you become a part of EEFA? (5)

- 2) Please use a weather analogy to describe the conditions surrounding your overall participation in EEFA (e.g., sunny with a gentle breeze, cloudy with a chance of meatballs, 75 degrees and windy, hailstorms, etc.). Tell me more about how this analogy reflects your experience. (7)

3) **IF INTERVIEWEE IS A STATE PARTNER**

From our review of documents, [state] coalition's 2020 priorities are

Does that sound like your understanding of what your state is driving toward?

How did the coalition determine these priorities?

Are there any implicit or unwritten priorities for your state?

What role does your organization play in addressing these priorities? (10)

*If asked where the priorities came from note JPB requested this document as part of the grant renewal application process over the summer. Their understanding is that it was co-created with state partners.*

**EEFA Governance and Structure (30-34 minutes)**

Now, let's spend some time discussing the structure and governance of EEFA.

- 4) First, let's discuss roles and responsibilities in EEFA. From your vantage point, describe the relationship among EEFA's key national partners (National Housing Trust, Energy Foundation, and National Resources Defense Council, Elevate Energy). (10 - 12 minutes)
- a. How do these groups relate to the states? Your organization? *Tailor this probe to the org you are speaking with.*
  - b. **IF A STATE PARTNER** What has been your state coalition's interaction with these organizations? (see above)
  - c. What roles do NEWHAB and Two Brown Girls play in EEFA?
- 5) Let's drill down more relative to your experience with EEFA's structure and governance. (15 minutes)
- a. EEFA's [priorities](#) are reducing energy burdens, advancing equitable policies, promoting program solutions, preserving affordable housing, making homes healthier, and coalition and network building. To the best of your knowledge, how were these priorities set? Did your organization have a chance to contribute to this thinking?

- b. How would you describe the distribution of power in EEFA? Where is it concentrated? How does this impact your participation?
  - c. Please describe your understanding of how funding decisions are made.
  - d. How is information shared across the initiative at the national level? How do the states relate to and communicate with each other?
  - e. On a scale of 1 to 5, please assess your organization's ability to influence the shape and direction of EEFA, with 1 being "My organization has had limited to no influence on the broader initiative" and 5 being "My organization has had significant influence on the broader initiative." *Please pose this question using the poll function or via chat.*
  - f. Tell me more about your assessment.
- 6) What has JPB done really well as a funder of EEFA? What have been their greatest shortcomings? (5 to 7 minutes)

#### **EEFA Racial Equity Priorities (10 minutes)**

I have a few questions for you today about racial equity in EEFA. We will be asking more questions early next year in a survey.

- 7) When you describe how racial equity is operationalized in EEFA, what do you share in close company? For instance, how does racial equity influence policy decisions? Governance of the initiative?
- 8) Is there anything you would change about racial equity in EEFA? If so, what would be of greatest priority to you?

#### **Vision for EEFA (10 minutes)**

This process is aimed at reshaping how EEFA is implemented moving forward. In this part of our conversation, I want to hear your greatest desires, hopes, and anticipations for a new and improved EEFA.

- 9) EEFA started in 2013 and has amassed nearly \$800 million in public service dollars for local-level benefit across a dozen states. That is something to be proud of. As a seven-year-old initiative, which statement(s) describes how to best balance power and drive EEFA's impacts in the future? *The options may need to be put in the chat box.* (10 minutes)
  - i. Decision-making, governance, priority setting, and resource allocation should be concentrated among national organizations.
  - ii. There should be equality between national and state-level organizations in these functions.
  - iii. Decision-making, governance, priority setting, and resource allocation should be concentrated among state coalitions.

- iv. We need a tailored approach that strikes the right balance between national and state organizations.
  - v. I have a different idea. It is: \_\_\_\_\_.
  - vi. Right now, I am not sure. I need to think about this question more.
- b. Tell me more about your choice.

**Closing (3 minutes)**

10) Is there anything else you would like to share with me?

Thank you for your time and contributions to this process.

## FAQs

### 1) What is the purpose of Reset, Restart, and Reimagine?

EEFA partner technical skills in policy have translated to significant gains. At the same time,

- JPB has deep concerns about power imbalances, coalition structure, lack of transparency, and racially unjust treatment.
- JPB has made a significant investment in EEFA and plans to do so for some time to come.
- However, the future leadership of this body of work must reflect the right balance of racial equity expertise, coalition management, network weaving, and technical know-how. It also must align with JPB's values.
- JPB greatly appreciates the feedback and insights you have provided in past efforts to address EEFA's structure and power dynamics.
- JPB intends for this current effort to be different, and we hope you will join us on this co-creation journey.

### 2) What are the potential products?

KHA's product will be a report synthesizing learnings from the listening sessions, interviews, and surveys. JPB hopes to use this to co-create with EEFA partners a structure whose leadership reflects the right balance of racial equity expertise, coalition management, network weaving, and technical know-how. It also must align with JPB's values.

### 3) What is the expected time frame?

This phase of the process is intended to last through March. The listening sessions were completed on November 24, and the interviews should be completed by mid-December. We will launch the survey in January.

Refer most other questions to JPB after requesting interviewee's permission to share identifying information.

### 4) How were the listening sessions grouped?

<b>Session</b>	<b>Session Date/Time</b>
Consultants	November 11, 2020; 9:00-10:30am CT
Midwest	November 11, 2020 10:45am-12:15pm CT
Northeast/Mid Atlantic	November 12, 2020 1:00-2:30pm CT
West/South	November 13, 2020 11:00am-12:30pm CT

Georgia 1	Wed Nov 18, 2020 9:30am – 11am (EST)
Georgia 2	Wed Nov 18, 2020 3:30pm – 5pm (EST)
Additional	Thu Nov 19, 2020 9:30am – 11am (EST)
NRDC	Thu Nov 19, 2020 3pm – 4:30pm (EST)
NHT	MOnday, Nov 23, 2020 9:30am – 11am (EST)
NEWHAB	Fri Nov 20, 2020 2:30pm – 4pm (EST)
Elevate/NEI	Fri Nov 20, 2020 morning
Energy	Tuesday, Nov 24, 2020



## **Appendix G. Interview Protocol - Consultants**

## Reset, Restart, Reimagine:

### EEFA Consultant Interview Protocol

**Purpose:** To hear from each EEFA partner about the initiative's governance, racial dynamics, and potential ways forward.

<b>Interviewee(s)</b> (names and roles)	
<b>Organization</b>	
<b>Contact Information</b> (email and phone)	
<b>Background Information</b> (e.g., <a href="#">state</a> <a href="#">priorities</a> , if applicable)	

**Opening Statement:** Good morning/afternoon (*based on interviewee org's time zone*). I am Carmen Simon/Leslie Reynolds/Mikhiela Sherrod, a consultant/strategy, evaluation, and learning associate/manager with Keecha Harris and Associates, the firm working with JPB to realign the governance and structure of Energy Efficiency for All (EEFA). The net intention for this process is that the future of EEFA will reflect a more equitable distribution of power using a racial equity lens.

Today's conversation is the second of three components of the assessment phase of the EEFA reset journey. During the first stage, EEFA national and state partner organizations and consultants participated in a series of 12 listening sessions designed to put into context why the EEFA reset was a necessity; discuss power, governance, and equity; and share planned activities for the reset period.

Between now and early January, we will interview each EEFA partner organization to gain your perspectives on EEFA's governance and racial dynamics. We are asking you to share concrete descriptors of what is needed to move the initiative forward. Your insights will influence our governance and structure recommendations. The third way that we will seek your input will be via an online survey that will be sent to all EEFA national, local, and state partners in January.

Our conversation today is expected to last approximately 60 to 75 minutes. Please note that this interview will be recorded for note-taking purposes. Data will be shared at the aggregate level. Your individual level input will be kept anonymous. Please be candid in your response and assured that what you share will be handled with great care for protecting your identity.

Do you have any questions for me before we get started?

#### Opening Questions (12 minutes)

- 1) There has been a long-standing effort to improve residential energy efficiency. EEFA started formally in 2013. When did you begin to work with EEFA?
- 2) Please use a weather analogy to describe the conditions surrounding your overall experience in EEFA (e.g., sunny with a gentle breeze, cloudy with a chance of meatballs, 75 degrees and windy, hailstorms, etc.). Tell me more about how this analogy reflects your experience.

### EEFA Governance and Structure (30-34 minutes)

Now, let's spend some time discussing the structure and governance of EEFA.

- 3) First, let's discuss roles and responsibilities in EEFA. From your vantage point, describe the relationship among EEFA's key national partners (Elevate, National Housing Trust, Energy Foundation, and National Resources Defense Council). (10 to 12 minutes)
  - a. How do these groups relate to the states?
  - b. What have [insert name of interviewee organization]'s interactions with these organizations entailed?
  - c. What roles do NEWHAB and Two Brown Girls play in EEFA?
- 4) Let's drill down more relative to your experience with EEFA's structure and governance. (15 minutes)
  - a. EEFA's [priorities](#) are reducing energy burdens, advancing equitable policies, promoting program solutions, preserving affordable housing, making homes healthier, and coalition and network building. To the best of your knowledge, how were these priorities set? Did you have a chance to contribute to this thinking?
  - b. How would you describe the distribution of power in EEFA? Where is it concentrated? How does this impact your work with EEFA?
  - c. Please describe your understanding of how funding decisions are made.
  - d. How is information shared across the initiative at the national level? How do the states relate to and communicate with each other?
  - e. On a scale of 1 to 5, please assess your organization's ability to influence the shape and direction of EEFA, with 1 being "My organization has had limited to no influence on the broader initiative" and 5 being "My organization has had significant influence on the broader initiative." *Please pose this question using the poll function or via chat.*
  - f. Tell me more about your assessment.
- 5) What has JPB done really well as a funder of EEFA? What have been their greatest shortcomings? (5 to 7 minutes)

### EEFA Racial Equity Priorities (10 minutes)

I have a few questions for you today about racial equity in EEFA. We will be asking more questions early next year in a survey.

- 6) When you describe how racial equity is operationalized in EEFA, what do you share in close company? For instance, how does racial equity influence policy decisions? Governance of the initiative?
- 7) Is there anything you would change about racial equity in EEFA? If so, what would be of greatest priority to you?

### **Vision for EEFA (10 minutes)**

This process is aimed at reshaping how EEFA is implemented moving forward. In this part of our conversation, I want to hear your greatest desires, hopes, and anticipations for a new and improved EEFA.

In this closing section, I am going to pose a series of brief scenarios and prompts for your response.

- 8) EEFA started in 2013 and has amassed nearly \$800 million in public service dollars for local-level benefit across a dozen states. That is something to be proud of. As a seven-year-old initiative, which statement(s) describes how to best balance power and drive EEFA's impacts in the future? *The options may need to be put in the chat box.* (10 minutes)
  - i. Decision-making, governance, priority setting, and resource allocation should be concentrated among national organizations.
  - ii. There should be equality between national and state-level organizations in these functions.
  - iii. Decision-making, governance, priority setting, and resource allocation should be concentrated among state coalitions.
  - iv. We need a tailored approach that strikes the right balance between national and state organizations.
  - v. I have a different idea. It is: \_\_\_\_\_.
  - vi. Right now, I am not sure. I need to think about this question more.
- b. Tell me more about your choice.

### **Closing (3 minutes)**

- 9) Is there anything else you would like to share with me?

Thank you for your time and contributions to this process.

## FAQs

### 1) What is the purpose of Reset, Restart, and Reimagine?

EEFA partner technical skills in policy have translated to significant gains. At the same time,

- JPB has deep concerns about power imbalances, coalition structure, lack of transparency, and racially unjust treatment.
- JPB has made a significant investment in EEFA and plans to do so for some time to come.
- However, the future leadership of this body of work must reflect the right balance of racial equity expertise, coalition management, network weaving, and technical know-how. It also must align with JPB's values.
- JPB greatly appreciates the feedback and insights you have provided in past efforts to address EEFA's structure and power dynamics.
- JPB intends for this current effort to be different, and we hope you will join us on this co-creation journey.

### 2) What are the potential products?

KHA's product will be a report synthesizing learnings from the listening sessions, interviews, and surveys. JPB hopes to use this to co-create with EEFA partners a structure whose leadership reflects the right balance of racial equity expertise, coalition management, network weaving, and technical know-how. It also must align with JPB's values.

### 3) What is the expected time frame?

This phase of the process is intended to last through March. The listening sessions were completed on November 24, and the interviews should be completed by mid-December. We will launch the survey in January.

Refer most other questions to JPB after requesting interviewee's permission to share identifying information.

### 4) How were the listening sessions grouped?

<b>Session</b>	<b>Session Date/Time</b>
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Georgia 1	Wed Nov 18, 2020 9:30am – 11am (EST)
Georgia 2	Wed Nov 18, 2020 3:30pm – 5pm (EST)
Additional	Thu Nov 19, 2020 9:30am – 11am (EST)
NRDC	Thu Nov 19, 2020 3pm – 4:30pm (EST)
NHT	MOnday, Nov 23, 2020 9:30am – 11am (EST)
NEWHAB	Fri Nov 20, 2020 2:30pm – 4pm (EST)
Elevate/NEI	Fri Nov 20, 2020 morning
Energy	Tuesday, Nov 24, 2020

## **Appendix H. Survey Protocol**

## EEFA Reset, Restart, and Reimagination Survey Protocol

Energy Efficiency for All (EEFA) unites people from diverse sectors and backgrounds to collectively make multifamily affordable homes energy- and water-efficient. The JPB Foundation's Environment program strives to enable healthy and resilient communities by enriching and supporting the environment. EEFA is a cornerstone of the program's strategy.

JPB contracted Keecha Harris and Associates, Inc (KHA), a firm committed to racial equity and rooted in transparency, integrity, and accountability, to support realignment of the governance and structure of Energy Efficiency for All (EEFA). The net intention for this process is that the future of EEFA will reflect a more equitable distribution of power using a racial equity lens. This survey is the last of three components of the assessment phase of the EEFA reset journey. The first two components, listening sessions and interviews, were designed to put into context why the EEFA reset was a necessity; discuss power, governance, and equity; and share planned activities for the reset period. KHA will analyze the data from all three components and help communicate the results to interested parties – most importantly to you, EEFA's partners and consultants.

There are three purposes for this survey: 1) obtain individual feedback about how racial equity is operationalized; 2) glean insight into whether the initiative behaves as a coalition; and 3) gain further input on your individual vision. The estimated time needed for survey completion is 45 minutes. Survey responses will be anonymous, and data will be reported in the aggregate. Questions about the survey may be directed to KHA. Please reach out to Leslie Reynolds at [lreynolds@khandassociates.com](mailto:lreynolds@khandassociates.com) with any questions. Thank you again for your time and your willingness to respond to this survey.

### **Racial Equity Priorities and Performance** (15 minutes)

This set of questions explores EEFA's racial equity priorities and examines the initiative's racial equity performance.

- 1) Please rate EEFA racial equity priorities on the following statements, on a scale from 1 to 5, with 1 being strongly disagree and 5 being strongly agree. If you would like to distinguish between levels of EEFA, please explain in your response to Question 2.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
EEFA is explicitly focused on removing barriers to opportunity for low-income communities and communities of color by improving access to energy efficiency programs and resources for affordable multifamily housing.					
EEFA is explicitly focused on reducing disparities among communities of color and					



low-income communities as those disparities relate to energy burden.					
EEFA is explicitly focused on leveling the playing field for residents negatively impacted by energy-inefficient housing.					
EEFA promotes capacity-building and asset-building to support making affordable housing healthier and more energy-efficient for low-income people and communities of color.					
Results of EEFA work show a reduction in racial disparities in energy burden.					
EEFA provides useful opportunities for partners to discuss barriers to opportunity for low-income communities and communities of color by improving access to energy efficiency programs and resources for affordable multifamily housing.					
EEFA provides useful opportunities for partners to discuss racial inequities.					
EEFA provides useful opportunities for partners to discuss leveling the playing field for residents negatively impacted by energy-inefficient housing.					
I feel empowered to address racial inequities in my role with EEFA.					
Diversity, racial equity, and inclusion are values and practices pivotal to effective EEFA leadership.					

- 2) Please use this space to provide comments about and context for any of your ratings above.  
[comment box]
- 3) Please rate EEFA's performance, on a scale from 1 to 3, with 1 being not demonstrated at all and 3 being strongly demonstrated.

	Not Demonstrated at All	Partially Demonstrated	Strongly Demonstrated
Having a racially diverse senior leadership nationally (i.e., project co-directors, senior leads, regional leads, and state leads employed by a national partner)			
Having a racially diverse senior leadership at the state level (i.e., state leads employed by a state partner)			
Recruiting and maintaining a racially diverse staff across the national partners (Elevate Energy, Energy Foundation, National Housing Trust, and Natural Resources Defense Council) as a whole			
Recruiting and maintaining a racially diverse staff at the state level			
Having a strategic plan and/or theory of change that reflects a racial equity analysis at the national level			
Having a strategic plan and/or theory of change that reflects a racial equity analysis at the state level			
Implementing racial equity into the governance of EEFA at the national level			
Implementing racial equity into the governance of EEFA at the state level			
Integrating racial equity into customary decision-making at the national level			
Integrating racial equity into customary decision-making at the state level			
Using conflict resolution skills and techniques to address concerns related to race at the national level			
Using conflict resolution skills and techniques to address concerns related to race at the state level			

Communicating priorities around racial equity at the national level			
Communicating priorities around racial equity at the state level			

- 4) Please use this space to provide comments about and context for any of your ratings above. [comment box]
- 5) If you are a state coalition member, please tell us about any racial equity programming sponsored by your state coalition. [comment box]

**Structural Effectiveness** (10 minutes)

This set of questions explores EEFA's structural effectiveness.

- 6) Please rate EEFA partner organizations (state and national) and people in leadership roles (i.e., project co-directors, senior leads, regional leads, and state leads) as related to efficiency in practice, on a scale of 1 to 5, with 1 being strongly disagree and 5 being strongly agree.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Partner organizations work together to make the initiative's financial resources go substantially further.					
Partner organizations work together to coordinate initiative activities to avoid unnecessary duplication of efforts.					
Partner organizations work together to strengthen each other's advocacy efforts.					
People in leadership roles promote the involvement of a broad base of partners in the work of the initiative.					
People in leadership roles reposition initiative assets, competencies, and resources to address changing needs and priorities.					
People in leadership roles work to develop other leaders in the					

initiative.					
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- 7) Please rate EEFA partner organizations (state and national) and people in leadership roles (i.e., project co-directors, senior leads, regional leads, and state leads) as they relate to approaches to relationships, on a scale of 1 to 5, with 1 being strongly disagree and 5 being strongly agree.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Partner organizations work together to establish positive relationships and strong links with community members whom the initiative wants to engage and mobilize.					
People in leadership roles establish positive relationships and strong links with community members whom the initiative wants to engage and mobilize.					
People in leadership roles facilitate positive relationships with other key players and stakeholders involved in the issues.					
People in leadership roles build respectful relationships between the coalition and the community.					

- 8) Please rate EEFA partner organizations (state and national) and people in leadership roles (i.e., project co-directors, senior leads, regional leads, and state leads) as related to partnerships, on a scale of 1 to 5, with 1 being strongly disagree and 5 being strongly agree.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Partner organizations encourage each other to actively participate in the initiative's decision-making process.					

Partner organizations encourage each other to identify issues, analyze problems, select interventions, and evaluate interventions.					
Partner organizations have a sense of inclusivity that engages a variety of public and private individuals – from elected officials to community leaders and residents.					
People in leadership roles encourage partners' active participation in the initiative's decision-making process.					
People in leadership roles facilitate open communication within the initiative and with the initiative's leaders.					
People in leadership roles facilitate a sense of inclusivity that engages a variety of public and private individuals – from elected officials to community leaders and residents.					
People in leadership roles work to engage a broad cross section of people to participate in the initiative's work.					

### **EEFA Vision** (20 minutes)

This process is aimed at reshaping how EEFA is implemented moving forward. In this part of the survey, we want to hear your greatest desires, hopes, and anticipations for a new and improved EEFA.

### **EEFA Values**

9) A value or characteristic that will be most pivotal to EEFA's future is: \_\_\_\_\_. [text box]

10) Why is this value of importance to you? [comment box]

### **EEFA Accomplishments**

11) Think ahead to January 2026. EEFA's accomplishment that you are most proud of is \_\_\_\_\_. [text box]

12) What does your organization need in order to fully and authentically contribute to this vision?  
[comment box]

13) To achieve this vision, what other organizations need to be added to EEFA? [multiple text boxes]

### **Racial Equity in EEFA**

14) A racially equitable EEFA in January 2026 will include these three must-have elements: \_\_\_\_, \_\_\_\_, and \_\_\_\_\_. [Three text boxes]

### **EEFA Communications**

15) During the listening sessions and interviews, we heard many partners say that they would like to know more about what other states are doing. What type of information would you like to hear about from other states? Select all that apply.

- a) Conflict resolution
- b) Fundraising
- c) Governance structure
- d) Healthy partnership development
- e) Local or state challenges
- f) Local or state wins
- g) Media or spokesperson training
- h) Policy gains
- i) Policy training and technical assistance
- j) Working with local or state utility entities
- k) Working with local or state housing entities
- l) None of the above
- m) Other: \_\_\_\_\_

16) How motivated are you to share information about your EEFA efforts across the initiative, on a scale of 1 to 5, with 1 being not really and 5 being sign me up? [use the slider option with “not really” and “sign me up” at the ends]

17) How much time each week would you like to spend reviewing, contributing to, and/or participating in EEFA-related communications?

- a) 2 hours or more
- b) 1.5-2 hours
- c) 1- 1.5 hours
- d) 30 minutes to 1 hour
- e) 30 minutes or less
- f) Weekly would be too frequent

18) What are the three main ways you would like to receive EEFA communications on a regular basis? Please rank up to three options with 1 being your leading choice:

- a) Articulate or other e-learning tool
- b) Email
- c) Intranet
- d) LISTSERV™
- e) Mail
- f) Phone-based meeting
- g) Video-based meeting
- h) Website
- i) Other: \_\_\_\_\_

### **EEFA Funding, Support, and Restructuring**

19) Does your state coalition need anything to support engagement with impacted communities? [Y/N/NA] If so, what does it need? [comment box]

20) Take a minute to think of the best kind of funding partner for the EEFA you have described. In five words or less, what is the most prominent characteristic of an EEFA funding partner? [text box]

21) What aspects of capacity building, coalition management, network weaving, racial equity expertise, and technical expertise will be necessary to the future of EEFA? [Multiple textboxes (5) with options being “capacity building,” “coalition management,” “network weaving,” “racial equity,” and “technical expertise.”]

### **Demographic Questions**

This section of the survey is intended to help us understand the demographics of our respondent pool.

22) Which of the following race and ethnicity categories would you use to describe yourself? Please select all that apply.

- a) American Indian or Alaska Native (e.g., Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village of Barrow Inupiat Traditional Government, Nome Eskimo Community, etc.)
- b) Asian (including East Asian, South Asian, and Southeast Asian)
- c) Black or African American (e.g., African American, Jamaican, Haitian, Nigerian, Ethiopian, Somali, etc.)
- d) Hispanic, Latinx, or Chicanx (e.g., Mexican or Mexican American, Puerto Rican, Cuban, Salvadorian, Dominican, Columbian, another country of Latin American or Spanish origin, etc.)
- e) Middle Eastern or North African (e.g., Lebanese, Iranian, Egyptian, Syrian, Moroccan, Algerian, etc.)
- f) Native Hawaiian or Pacific Islander (Native Hawaiian, Samoan, Chamorro, Tongan, Fijian, Marshallese, etc.)
- g) White (e.g., German, Irish, English, Italian, Polish, French, etc.)
- h) Race, ethnicity, or origin not listed

- i) Prefer not to provide this information
- 23) Which of the following sex or gender categories would you use to describe yourself?
  - a) Male/man (could include cisgender men, transgender men, and male-identified individuals)
  - b) Female/woman (could include cisgender women, transgender women, and female-identified individuals)
  - c) Gender nonbinary or gender nonconforming individual
  - d) Prefer not to provide this information
- 24) Please select your age group.
  - a) Under 25
  - b) 25-34
  - c) 35-44
  - d) 45-54
  - e) 55-64
  - f) 65 and above
- 25) Are you an employee of a state partner or national partner?
  - a) State
  - b) National
- 26) Is your organization's chief executive or president someone who identifies as Black, Indigenous, or a person of color?
  - a) Yes
  - b) No

### **Closing**

- 27) What non-EEFA-affiliated organizations should we be speaking with about racial equity and energy efficiency in multifamily housing? [multiple text boxes]

[Custom thank you page and redirect to Articulate  
([https://rise.articulate.com/share/O5C8SEaNujRVE8jWZ48qldwtfqa6Zmge#/](https://rise.articulate.com/share/O5C8SEaNujRVE8jWZ48qldwtfqa6Zmge#/)))].



## **Appendix I. Listening Session, Interview, and Survey Data**

## Racial Equity in EEFA

### LISTENING SESSIONS

*Table 1. Specific examples of how racial equity has been promoted in EEFA (listening sessions: n=90)*

Themes	Mentions
The work itself	61
RE workshops	19

*Table 2. Specific instances racial equity has not been promoted in EEFA (listening sessions: n=90)*

Themes	Mentions
Non-diverse leadership	30
Not centering people	16

*Table 3. Things to propel EEFA forward to a more racially just and equitable body of work (listening sessions: n=90)*

Themes	Mentions
Leadership change needed	43
Better understanding of organizational roles, influence, and tensions	21
Allowing different perspectives at the table	7

## SURVEY

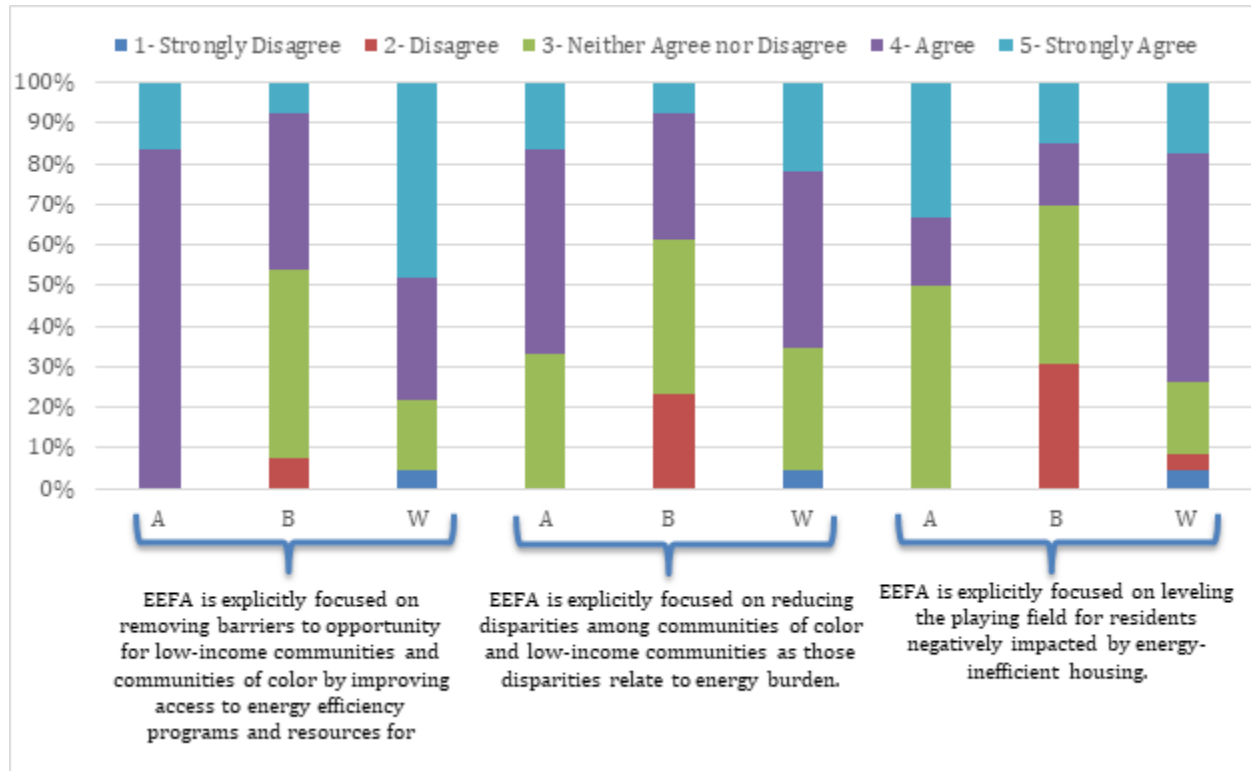


Figure 1. Ratings of EEFA explicit focus priorities (survey: nA=6, nB=13, nW=23)

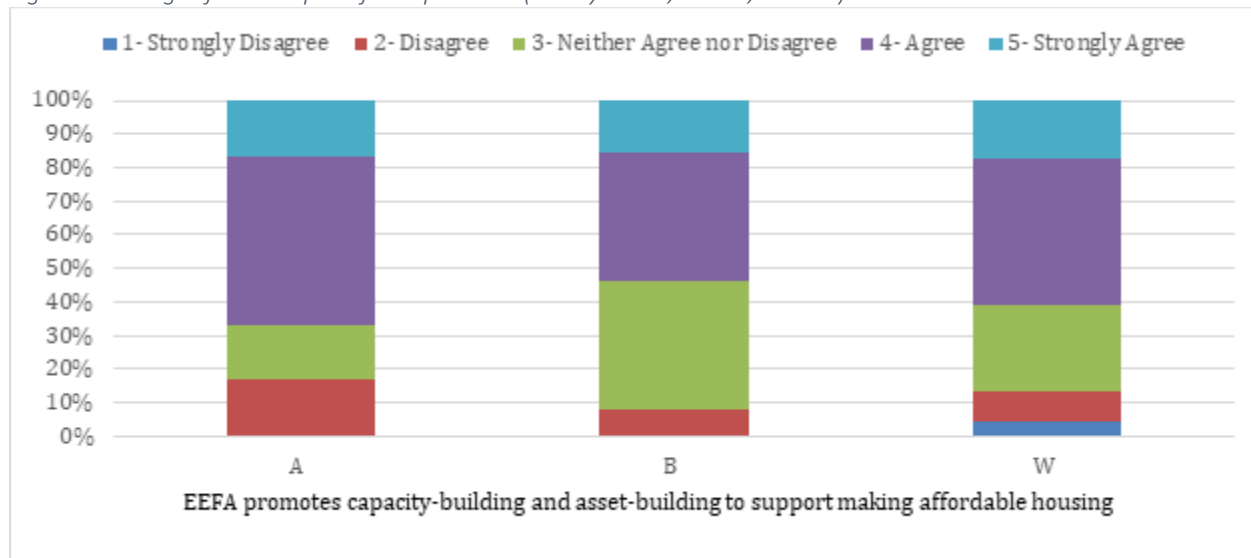


Figure 2. Ratings of EEFA explicit focus priorities (survey: nA=6, nB=13, nW=23)

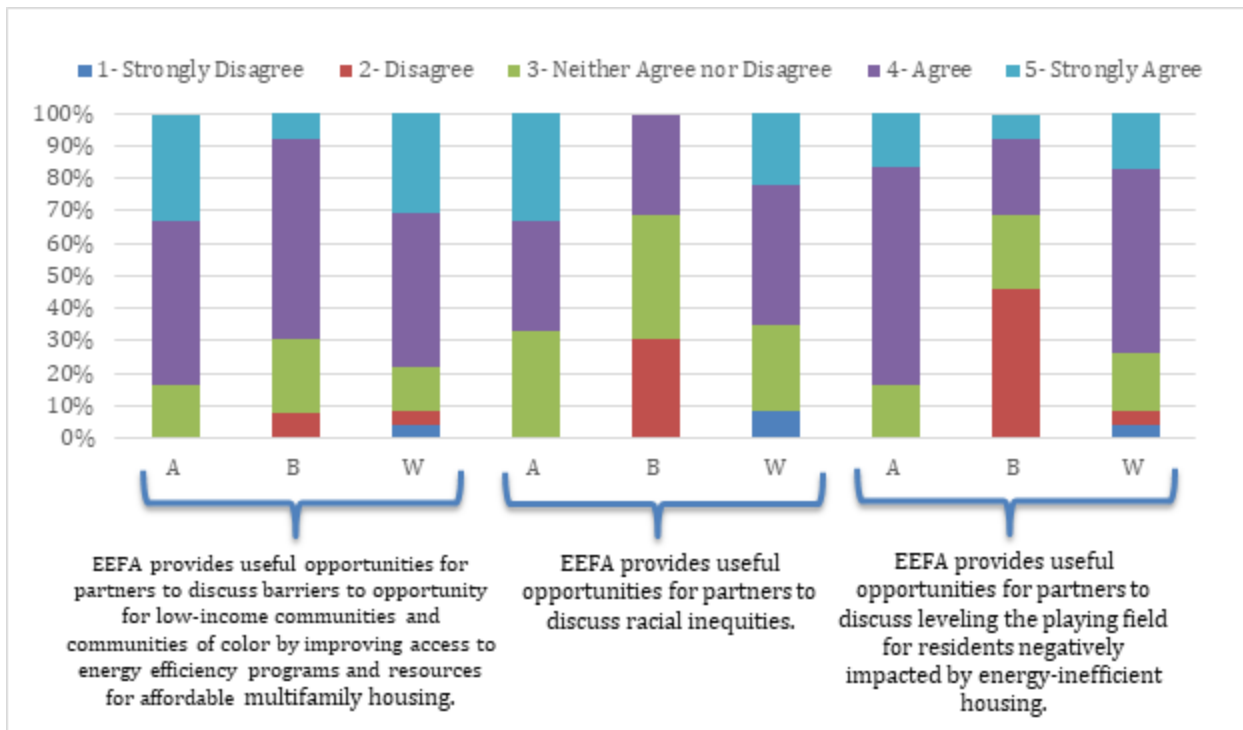


Figure 3. Ratings of EEFA opportunities (survey: nA=6, nB=13, nW=23)

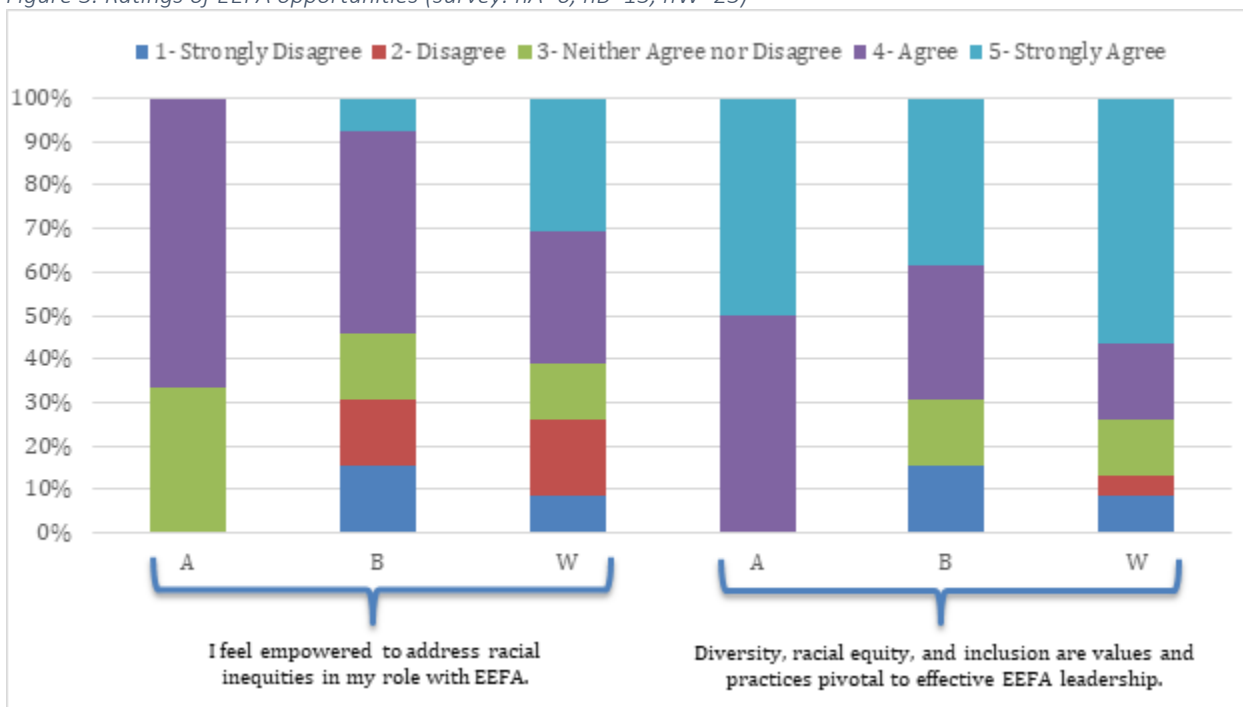


Figure 4. Ratings of EEFA equity and inclusion (survey: nA=6, nB=13, nW=23).

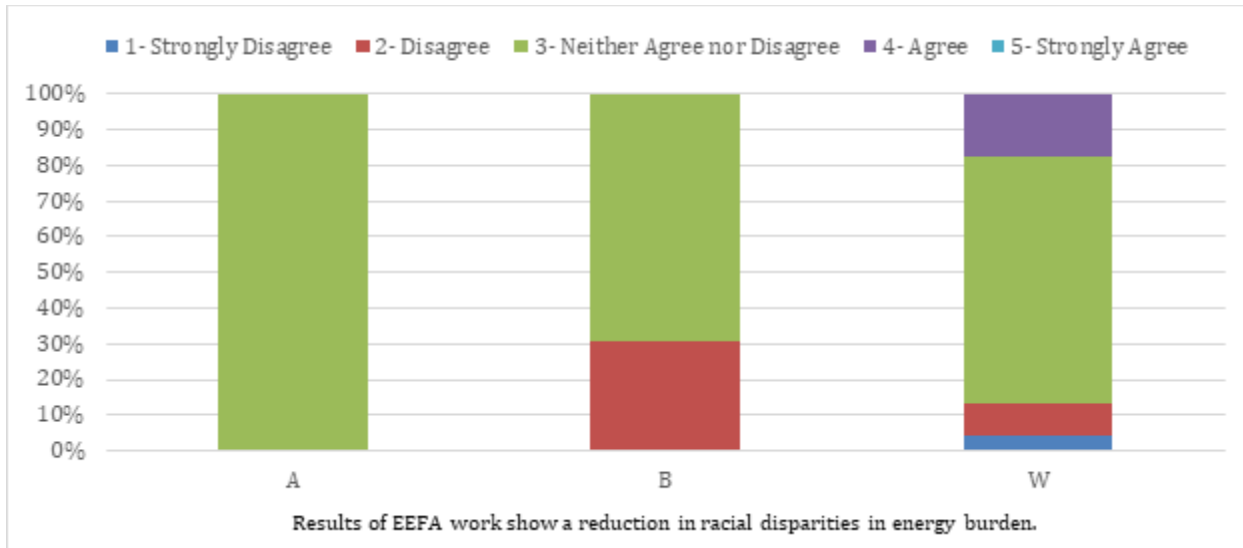


Figure 5. Ratings of EEFA outcomes (survey: nA=6, nB=13, nW=23)

Table 4. Rating EEFA's racial equity performance (survey: n=50)

	1- Not Demonstrated at All	2- Partially Demonstrated	3- Strongly Demonstrated	Total
Having a racially diverse senior leadership nationally (i.e., project co-directors, senior leads, regional leads, and state leads employed by a national partner)	20%	68%	11%	44
Having a racially diverse senior leadership at the state level (i.e., state leads employed by a state partner)	14%	69%	17%	42
Recruiting and maintaining a racially diverse staff across the national partners (Elevate Energy, Energy Foundation, National Housing Trust, and Natural Resources Defense Council) as a whole	5%	75%	20%	40
Recruiting and maintaining a racially diverse staff at the state level	3%	79%	18%	39
Having a strategic plan and/or theory of change that reflects a racial equity analysis at the national level	33%	52%	14%	42
Having a strategic plan and/or theory of change that reflects a racial equity analysis at the state level	20%	64%	16%	44
Implementing racial equity into the governance of EEFA at the national level	26%	59%	15%	39
Implementing racial equity into the governance of EEFA at the state level	21%	64%	15%	39
Integrating racial equity into customary decision-making at the national level	41%	53%	6%	32
Integrating racial equity into customary decision-making at the state level	18%	58%	24%	38

Using conflict resolution skills and techniques to address concerns related to race at the national level	34%	59%	6%	32
Using conflict resolution skills and techniques to address concerns related to race at the state level	36%	45%	18%	33
Communicating priorities around racial equity at the national level	19%	51%	30%	43
Communicating priorities around racial equity at the state level	16%	57%	27%	44

Table 5. Open-ended responses to ranking EEFA's performance (survey: n=33)

Theme	Mentions
Racial equity is an afterthought	17
No diversity in leadership	8
Limited interaction with one another: National or State partners	6
State coalition interest in integrating racial equity drives commitment	4

## INTERVIEWS

Table 6. Perceptions of racial equity in EEFA (interview: n=36)

Theme	Mentions
Addressing whiteness in leadership	17
Limited to conversations	15
Power dynamics	12
Trainings and convenings	12
Storytelling	10
Conflating of race and poverty	9
Intersectionality	9
NEWHAB as the convener and responsible party	9
Not doing the work – limited to policy, not translated into the field, not centered	9
Evolution over time	8

Table 7. Racial equity programming sponsored by state coalitions (interview: n=36)

Theme	Mentions
RE workshops or trainings	15
Conversations	6
Advocacy efforts	5
BIPOC leadership	4
Self-education	3

## EEFA Structural Effectiveness

### LISTENING SESSIONS

Table 8. Aspects of the EEFA structure that have been most effective (listening sessions: n=90)

Themes	Mentions
Coalitions	63
Access to expertise	12

Table 9. Least effective aspects of EEFA (listening sessions: n=90)

Themes	Mentions
Prioritizing racial equity	48
Community engagement	24
Transparent communication	13

### SURVEY

Table 10 State partners: Aspects of the EEFA structure that have been most effective (survey: n=23)

	1 - Strongly Disagree	2- Disagree	3- Neither Agree nor Disagree	4- Agree	5- Strongly Agree	Total
Partner organizations work together to make the initiative's financial resources go substantially further.	0%	17%	22%	26%	22%	23
Partner organizations work together to coordinate initiative activities to avoid unnecessary duplication of efforts.	9%	9%	22%	39%	17%	23
Partner organizations work together to strengthen each other's advocacy efforts.	0%	13%	26%	43%	17%	23
People in leadership roles promote the involvement of a broad base of partners in the work of the initiative.	0%	22%	26%	30%	22%	23
People in leadership roles reposition initiative assets, competencies, and resources to address changing needs and priorities.	4%	13%	22%	30%	26%	23
People in leadership roles work to develop other leaders in the initiative.	13%	13%	43%	4%	22%	23

Table 11. National partners: Aspects of the EEFA structure that have been most effective (survey: n=17)

	1- Strongly Disagree	2- Disagree	3- Neither Agree nor Disagree	4- Agree	5- Strongly Agree	Total
Partner organizations work together to make the initiative's financial resources go substantially further.	0%	6%	13%	50%	31%	16

Partner organizations work together to coordinate initiative activities to avoid unnecessary duplication of efforts.	6%	6%	13%	50%	25%	16
Partner organizations work together to strengthen each other's advocacy efforts.	0%	0%	19%	44%	38%	16
People in leadership roles promote the involvement of a broad base of partners in the work of the initiative.	0%	0%	13%	44%	44%	16
People in leadership roles reposition initiative assets, competencies, and resources to address changing needs and priorities.	0%	0%	31%	44%	25%	16
People in leadership roles work to develop other leaders in the initiative.	12%	6%	29%	24%	29%	17

Table 12. State partners: Effectiveness of approaches to relationships in EEFA (survey: n=23)

	1- Strongly Disagree	2- Disagree	3- Neither Agree nor Disagree	4- Agree	5- Strongly Agree	Total
Partner organizations work together to establish positive relationships and strong links with community members whom the initiative wants to engage and mobilize.	9%	22%	22%	26%	22%	23
People in leadership roles establish positive relationships and strong links with community members whom the initiative wants to engage and mobilize.	4%	39%	22%	17%	17%	23
People in leadership roles facilitate positive relationships with other key players and stakeholders involved in the issues.	4%	9%	13%	48%	26%	23
People in leadership roles build respectful relationships between the coalition and the community.	13%	22%	22%	17%	26%	23

Table 13. National partners: Effectiveness of approaches to relationships in EEFA (survey: n=16)

	1- Strongly Disagree	2- Disagree	3- Neither Agree nor Disagree	4- Agree	5- Strongly Agree	Total
Partner organizations work together to establish positive relationships and strong links with community members whom the initiative wants to engage and mobilize.	0%	13%	13%	50%	25%	16



People in leadership roles establish positive relationships and strong links with community members whom the initiative wants to engage and mobilize.	6%	19%	19%	38%	19%	16
People in leadership roles facilitate positive relationships with other key players and stakeholders involved in the issues.	0%	0%	6%	63%	31%	16
People in leadership roles build respectful relationships between the coalition and the community.	0%	0%	50%	31%	19%	16

Table 14. State partners: Effectiveness of approaches to participation in EEFA (survey: n=23)

	1- Strongly Disagree	2- Disagree	3- Neither Agree nor Disagree	4- Agree	5- Strongly Agree	Total
Partner organizations encourage each other to actively participate in the initiative's decision-making process.	9%	9%	22%	26%	35%	23
Partner organizations encourage each other to identify issues, analyze problems, select interventions, and evaluate interventions.	4%	17%	9%	35%	30%	23
Partner organizations have a sense of inclusivity that engages a variety of public and private individuals – from elected officials to community leaders and residents.	4%	4%	22%	52%	13%	23
People in leadership roles encourage partners' active participation in the initiative's decision-making process.	0%	17%	17%	35%	30%	23
People in leadership roles facilitate open communication within the initiative and with the initiative's leaders.	4%	4%	35%	26%	30%	23
People in leadership roles facilitate a sense of inclusivity that engages a variety of public and private individuals – from elected officials to community leaders and residents.	4%	13%	39%	17%	26%	23
People in leadership roles work to engage a broad cross section of people to participate in the initiative's work.	4%	22%	26%	22%	22%	23

Table 15. National partners: Effectiveness of approaches to participation in EEFA (survey: n=17)

	1- Strongly Disagree	2- Disagree	3- Neither Agree nor Disagree	4- Agree	5- Strongly Agree	Total

Partner organizations encourage each other to actively participate in the initiative's decision-making process.	0%	0%	6%	56%	38%	16
Partner organizations encourage each other to identify issues, analyze problems, select interventions, and evaluate interventions.	0%	0%	13%	56%	31%	16
Partner organizations have a sense of inclusivity that engages a variety of public and private individuals – from elected officials to community leaders and residents.	0%	25%	25%	38%	13%	16
People in leadership roles encourage partners' active participation in the initiative's decision-making process.	6%	6%	19%	50%	19%	16
People in leadership roles facilitate open communication within the initiative and with the initiative's leaders.	6%	12%	12%	53%	18%	17
People in leadership roles facilitate a sense of inclusivity that engages a variety of public and private individuals – from elected officials to community leaders and residents.	0%	6%	38%	38%	19%	16
People in leadership roles work to engage a broad cross section of people to participate in the initiative's work.	0%	6%	25%	44%	25%	16

## INTERVIEWS

Table 16. Thoughts on EEFA Structure (interview: n=36)

Themes	Mentions
Energy Foundation – Support	43
NRDC – Leading the work	37
Elevate – Spectrum of involvement	33
NHT – Working in the states	30
NEWHAB – Learning	17
State leads	13
Complicated	10

## INFORMATION SHARING – SURVEY

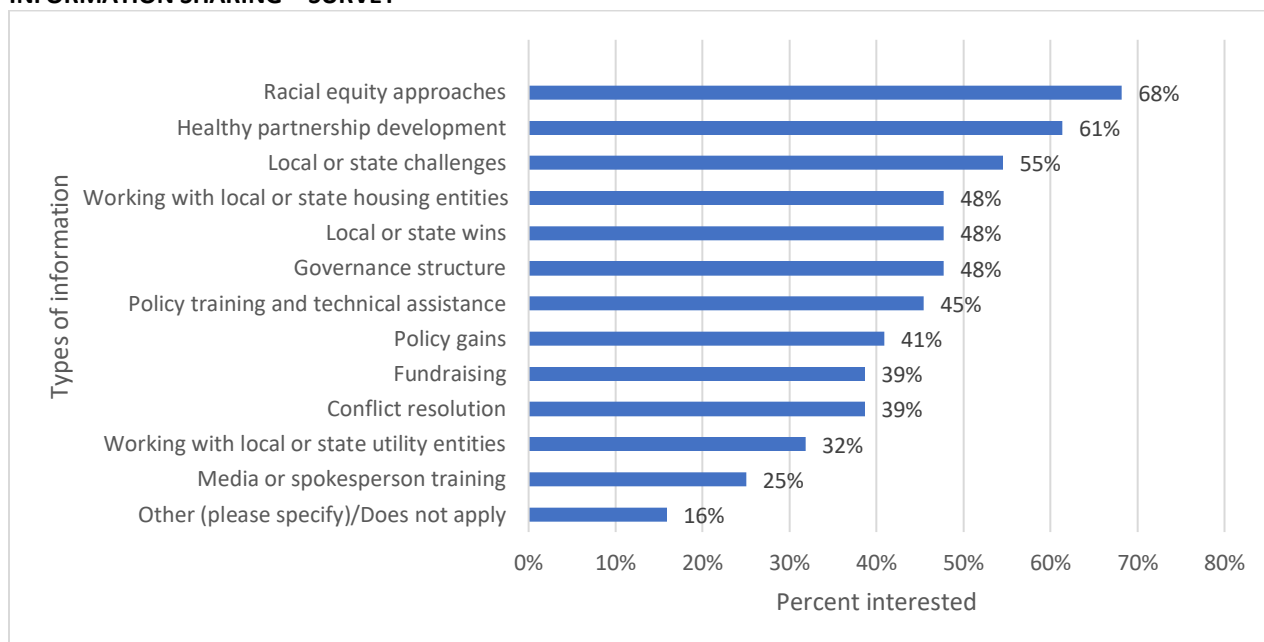


Figure 6. Types of information participants would like to hear about from other states (survey: n=44)

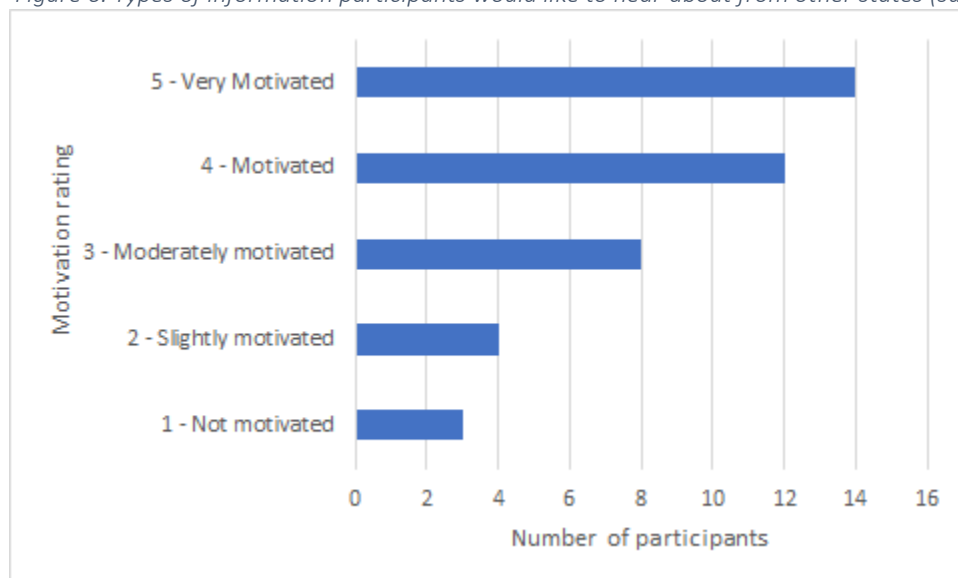


Figure 7. Number of participants by motivation to share information in EEFA (survey: n=41)

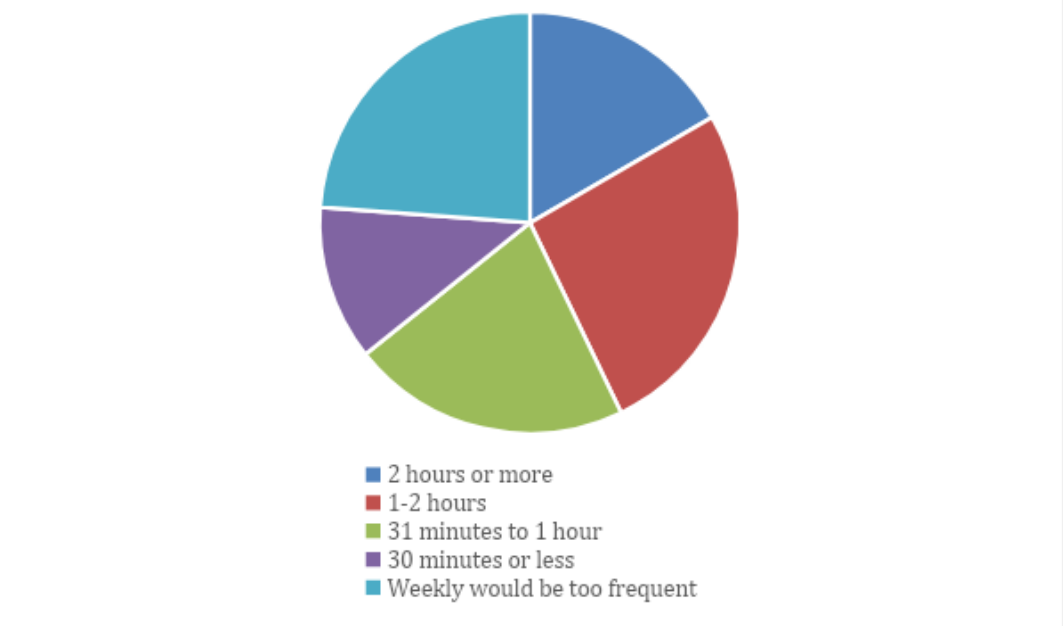


Figure 8. Number of hours partners are willing to spend on EEFA-related communications each week (survey: n=42)

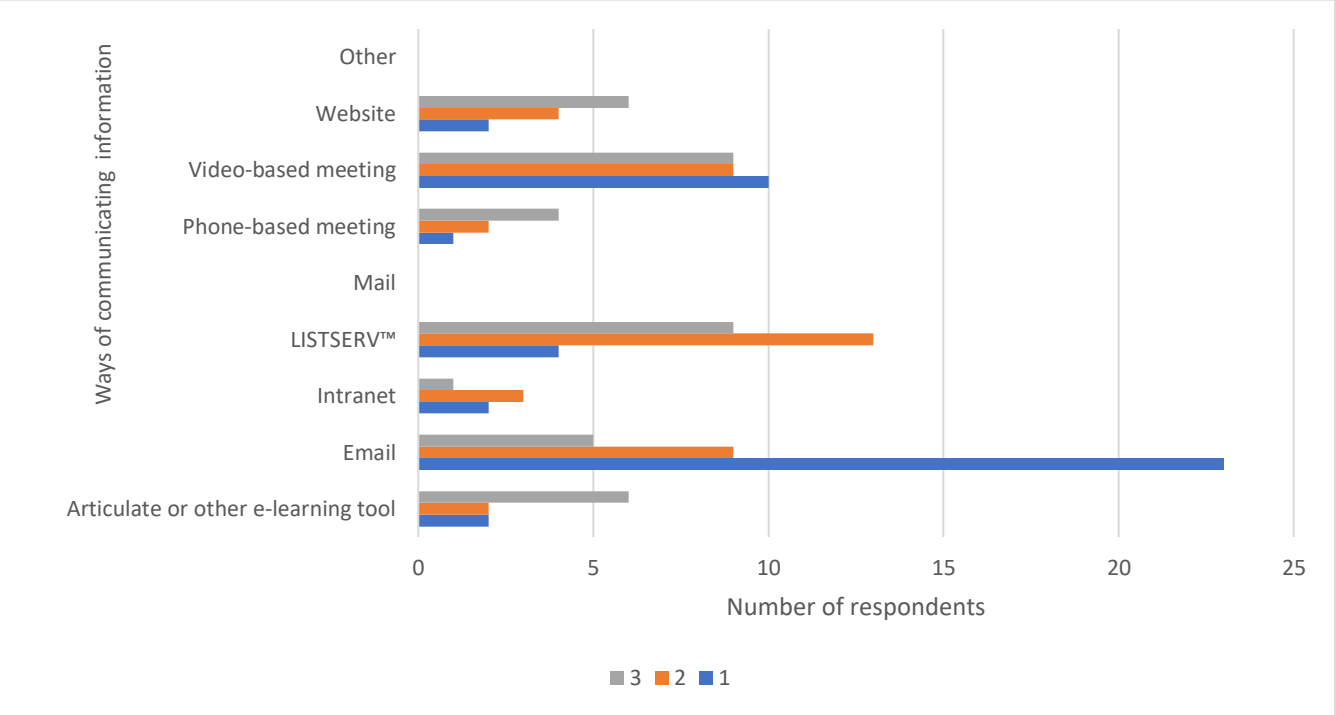


Figure 9. Ranked ways partners would like to receive information on a regular basis (survey: n=44)

**INFORMATION SHARING – INTERVIEWS**

Table 17. Current information sharing practices (interviews: n=36)

Theme	Mentions
NEWHAB communication with state and national partners	21

State to state – not much communication	17
Biweekly meetings occurring with national partners	14
Lack of communication	12

## ROLES AND RESPONSIBILITIES – INTERVIEWS

*Table 18. Perceptions of roles and responsibilities in EEFA (interview: n=36)*

Theme	Mentions
NEWHAB – Racial Equity	65
NRDC – Technical support	48
Energy Foundation – Financial	43
Two Brown Girls – Racial equity education	38
Elevate – Implementor	33
NHT – Expert intervenor	30
State leads	13
Siloed	7

*Table 19. Power and control in EEFA (interviews: n=36)*

Theme	Mentions
National partners	16
Concentrated in NRDC	5
Steering committee	5
Intentional distribution	3

## Future of EEFA

### SURVEY



Figure 10. Word cloud of value characteristics most pivotal to EEFA's future (survey: n=44)

Table 20. Overarching themes: Rationale for why noted values are of importance for shaping EEFA's future (survey: n=51)

Theme	Mentions
Community-driven solutions are integral to success	10
The work must support efficient, affordable housing	8
Lack of communication	5
Trust is critical	5

Table 21. Future accomplishments (January 2026) participants can be proud of (survey: n=51)

Theme	Mentions
Community-driven solutions will leverage success	16
Removing energy burden from affordable housing	11
Broader connection to advocacy	6
Data showing progress in BIPOC communities	5

Table 22. Organizational needs to fully and authentically contribute to the future vision of EEFA (survey: n=51)

Theme	Mentions
Financial resources	15
Initiatives supporting communities	10
Leadership change	6
Clear and consistent communication	5
JPB Foundation support	5

Table 23. Organizations that should be to be added to EEFA (survey: n=51)

Theme	Mentions
Community-focused groups	11
Housing groups	9
NAACP	6
Energy and environmental justice organizations	5
Racial equity organizations	5
Tenant rights groups	5
Black-led organizations	4

Table 24. Elements of a racially equitable EEFA in January 2026 (Survey: n=44)

Theme*	Mentions
Diverse leadership	22
Work done through a racial equity lens	9
Community engagement	7

\*Other themes included collaboration, diverse membership, process for conflict resolution, and transparency.

leadership funding three elements create change key state  
 focus work great need lack EEFA will racial equity  
 energy efficiency think community policies

Figure 11. Rationale for choosing the three elements needed for a more racially equitable EEFA in January 2026 (survey: n=31)

Willing<sub>open</sub> partner<sub>trust</sub> Listening<sub>clear</sub> Flexible<sub>need</sub>  
change<sub>funder</sub> Engaged

Figure 12. The best kind of funding partner for EEFA – characteristics (survey: n= 36)

resources<sub>organizing</sub> capacity<sub>build</sub> local<sub>EEfA</sub>  
capacity building<sub>leadership</sub> funding<sub>need</sub>  
partners<sub>policy</sub> support<sub>communications</sub> training

Figure 13. Capacity building aspects necessary for the future of EEFA (survey: n=25)

structure<sub>lead</sub> support<sub>building</sub> management<sub>Training</sub>  
coalition<sub>needed</sub> state<sub>leadership</sub>

Figure 14. Coalition management aspects necessary for the future of EEFA (survey: n=25)

movements NEWHAB

Figure 15. Network weaving aspects necessary for the future of EEFA (survey: n=25)

partners<sub>continue</sub> need<sub>commitment</sub> work<sub>equity</sub> training<sub>learning</sub>  
racial equity<sub>coalition</sub> EEFA<sub>centering</sub> leadership<sub>communities</sub>

Figure 16. Racial equity aspects necessary for the future of EEFA (survey: n=25)

housing<sub>energy</sub> efficiency<sub>will</sub> make<sub>communities</sub> including<sub>support</sub> advocacy<sub>technical</sub>  
coalitions<sub>changing</sub> experts<sub>communications</sub> need<sub>technical</sub>  
technical expertise<sub>partners</sub> policy<sub>state</sub> EEFA<sub>cases</sub>  
expertise<sub>analysis</sub> energy<sub>many</sub> Also<sub>affordable</sub> housing<sub>finance</sub>

Figure 17. Technical expertise aspects necessary for the future of EEFA (survey: n=24)



## INTERVIEWS

Table 25. Identified elements for a successful future of EEFA (interview: n=36)

Theme	Mentions
RE needs to be part of the fabric	27
Bottom-up approach	25
Who is at the table	19
Black leadership needed	18
Shared power	17
State to state approach	13
Leadership change	11

## TECHNICAL SUPPORT – SURVEY

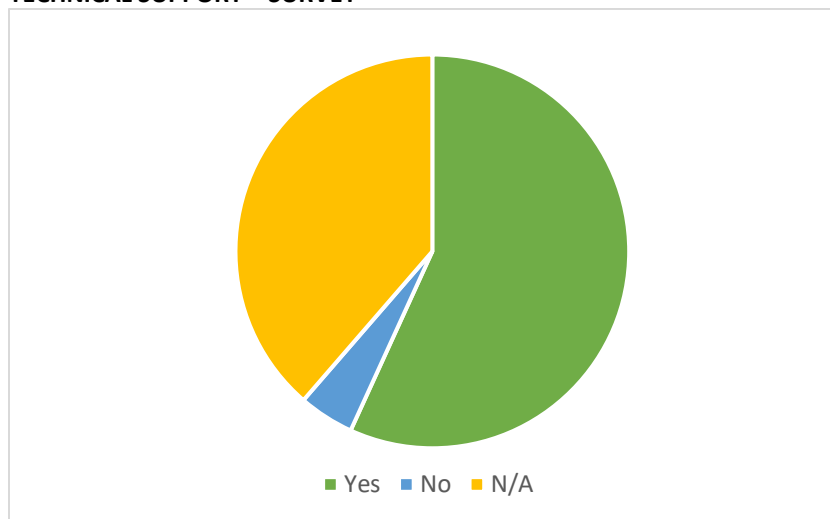


Figure 18. State coalition need for supporting engagement with impacted communities (survey: n=44)

staff communications additional state work know EEFA support  
time funding state coalition need coalitions community every  
partners resources

Figure 19. Support needed to engage impacted communities (survey: n=31)

## **Appendix J. Network, Coalition, and Movement Overview**

## NETWORKS, COALITIONS, AND MOVEMENTS OVERVIEW

EEFA is composed of individual organizations united around the vision of “powerful coalitions of affordable housing, health, energy, environmental, and community leaders driv[ing] changes in policy and practice to ensure that all renters live in homes that are affordable and healthy.”<sup>1</sup> “Networks,” “coalitions,” and “movements” are words used to describe all or parts of EEFA. While these terms are not mutually exclusive, there are distinctions. This section includes the meanings behind each of these words, describe leadership and racial equity principles in networks and coalitions, and highlight prior work describing how EEFA organizations and people relate to each other.

### Networks, Coalitions, and Movements

#### *Networks*

Networks are groups of people or organizations with some degree of shared information, ideas, resources, experiences, goals, and interests.<sup>2</sup> Madeleine Taylor and Peter Plastrik describe networks using a framework of three network functions – connectivity, alignment, and action. Connectivity builds stronger connections and trust, shares knowledge, creates new knowledge systems and resources channels, and develops an understanding of systems targeted for change.<sup>3</sup> Networks also align around common goals, values, and standards. Last, some networks agree on and engage in joint action to accomplish the aligned goals.

#### *Coalitions*

Coalitions are networks that agree on and engage in joint action to accomplish a goal. The creators of the Internal Coalition Outcome Hierarchy (ICOH), a model used for describing the effectiveness of coalitions, posit that coalitions require two features – “diverse community membership that works well together to achieve outcomes in each of the seven theoretical constructs” and “leaders that facilitate a learning environment whereby members can achieve agreed upon outcomes.”<sup>4</sup> The model’s effective coalition infrastructure outcomes include sufficient resources, completed activities, diverse participation, rewarding relationships, new knowledge and training, collaborative practices, and a shared social vision.<sup>5</sup> It is important to note that shared vision or goals should not be conflated with shared motivations. In addition, members of effective coalitions have a clear understanding of the terms of engagement. Last,

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<sup>1</sup> EEFA Website

<sup>2</sup> Reinelt (1), Fox (487)

<sup>3</sup> Reinelt

<sup>4</sup> Cramer, Atwood etc.

<sup>5</sup> Cramer, Atwood, etc

effective multi-sectoral coalitions rely on people or organizations that can serve as bridges to translate both language and concepts.<sup>6</sup>

### *Movements*

Movements have a goal of shifting a broad section of society's morals, thoughts, and actions. They often require shared identity, ideology, and strategy.<sup>7</sup> A movement can often operate through an informal connection of organizations, networks, and/or coalitions.<sup>8</sup> Characteristics of effective networks, coalitions and movements are enumerated in Table 4.

*Table 1 . Effective networks, coalitions, and movements compared*

	Network	Coalition	Movement
Connected people or organizations	Always	Always	Sometimes
Diverse membership	Sometimes	Always	Sometimes
Aligned goals	Always	Always	Always
Shared existing and new knowledge	Always	Always	Sometimes
Shared understanding of systems targeted for change	Always	Always	Sometimes
Shared resources	Always	Always	Sometimes
Shared strategy	Sometimes	Always	Always
Shared practices	Sometimes	Always	Sometimes
Shared identity and ideology	Sometimes	Sometimes	Always
Collective action	Sometimes	Always	Always

Sources: Reinelt, Fox

### **Leadership in Networks and Coalitions**

While effective leadership is not the only key to a successful network or coalition, failure in this area can limit a network or coalition's ability to achieve its aligned goals. Reinelt describes the differences between command-and-control leadership, traditional to some organizational cultures, and network leadership, traditional to other organizational cultures. In addition to leadership expanding beyond a few people, notable aspects of network leadership, with counterpart command-and-control leadership characteristics in parentheses, include:

- Engaging (broadcasting),
- Facilitating and supporting (controlling),
- Emerging (directing),
- Reflecting and action learning (evaluating), and

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<sup>6</sup> Fox

<sup>7</sup> Fox

<sup>8</sup> Holley

- Providing service (supporting self or own organization).

In addition to using a networked leadership style, coalition leaders support the success of the coalition by taking certain steps in ensuring sufficiency of resources, completed activities, diverse participation, rewarding relationships, new knowledge and training, collaborative practices, and a shared social vision. During the survey design process, JPB Foundation staff were particularly interested in the efficient practices, relationships, and participation domains. EEFA participants were asked to provide feedback about EEFA leadership's capabilities in those three domains. The specific practices of effective leaders in those three domains are listed in Table 5.

*Table 2. Efficiency, relationship, and diverse participation practices of leaders in effective coalitions*

Domain	Leadership Practice
Efficient Practices	Leaders promote the involvement of a broad base of members in the work of the coalition.
	Leaders reposition coalition assets, competencies, and resources to address changing needs and priorities.
	Leaders work to develop other leaders within the coalition.
Relationships	Leaders establish positive relationships and strong links with community members whom the coalition wants to engage and mobilize.
	Leaders facilitate positive community relationships with other local key players and stakeholders involved in the issues.
	Leaders build respectful relationships between the coalition and the community.
Participation	Leaders encourage members' active participation in the coalition's decision-making processes.
	Leaders facilitate open communication within the coalition and with the coalition leaders/managers.
	Leaders facilitate a sense of inclusivity that engages a variety of public and private individuals from the community in the coalition – from elected officials to community leaders and residents.
	Leaders work to engage a broad cross-section of the community to participate in the coalition's work.

## Racial Equity in Networks and Coalitions

A purpose of EEFA's Reset, Restart, and Reimagination (RRR) is to support a path for EEFA's national and local partners that justly distributes power and resources. The vision is a realigned EEFA with a structure for governance and accountability that brings about more equitable distribution of power through a racial equity lens. The JPB Foundation, as primary funder, intends to create a space where long-standing concerns around race, equity, and justice in EEFA's governance and structure can be addressed.

While rooting an individual organization's governance and structure in equity and justice is not simple, there are particular considerations for centering equity and justice in a collaboration of organizations. Wolff et al. posit that a collaboration that lacks a foundation of power sharing might not be able to be reset.

**Pull quote: *We believe that efforts that do not start with treating community leaders and residents as equal partners cannot later be reengineered to meaningfully share power. -Wolff et al***

However, they offer principles that should be in place for collaborative efforts aspiring to center equity and justice:

- Explicitly address issues of social and economic injustices and racism.
- Employ a community development approach in which residents have equal power in determining the coalition's or collaborative's agenda and resource allocation.
- Employ community organizing as an intentional strategy and as part of the process. Work to build resident leadership and power.
- Focus on policy, systems, and structural change.
- Build on the extensive community-engaged scholarship and research over the last four decades that show what works, that acknowledge the complexities, and that evaluate appropriately.
- Construct core functions for the collaborative based on equity and justice. These functions should provide basic facilitating structures and build member ownership and leadership.

Lastly, Wolff et al. present a call to action and specific recommendations for various actors in society. Relevant here are the calls to foundations and existing collaboratives. Essentially foundations are asked to be flexible – adjust expectations, adjust timelines, tolerate controversy, support shifting power, and be prepared to deal with inevitable conflicts. Existing collaboratives are asked to “embrace the principles of equity and justice...and reexamine their membership, distribution of power and resources, social change agendas, and current commitments to an equity and justice work plan.”<sup>9</sup>

**Pull quote: *Relabeling alone will not do the job.-Wolff et al.***

The RRR assessment process included inquiries to baseline EEFA's power dynamics and relationship with equity and justice.

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<sup>9</sup> Wolff et al.

## **Appendix K. Funding Ecosystem Example**

*Examples of potential rights and responsibilities of EEFA partners, regranter, and funder*

	Rights <sup>1</sup>	Responsibilities <sup>2</sup>
Funded Partner	<ul style="list-style-type: none"> <li>● Receive funding in accordance with the agreement (e.g., time frequency, amount)</li> <li>● Lead coalition strategy development and budgeting</li> <li>● Be informed of monetary and nonmonetary resources available to coalition</li> </ul>	<ul style="list-style-type: none"> <li>● Use funds properly and effectively to implement funded strategies</li> <li>● Maintain records</li> <li>● Submit complete and accurate program and financial reports in accordance with the conditions of the grant</li> <li>● Ensure adequate capacity to implement the funded strategy</li> <li>● Develop a budget reflective of what is needed to implement program strategies</li> <li>● Continually reflect on progress towards goals and outcomes and communicate opportunities for improvement by providing feedback on ineffective strategies</li> <li>● Provide thought leadership to strategy development</li> <li>● Introduce potential new partners to coalition and regranter</li> </ul>
Unfunded Partner	<ul style="list-style-type: none"> <li>● Participate in coalition strategy planning and budgeting</li> <li>● Expect consideration for future funding if indicated</li> </ul>	<ul style="list-style-type: none"> <li>● Implement strategies agreed to implement</li> <li>● Act in accordance with partnership agreement</li> <li>● Track and report monetary cost of participation and who bears it</li> </ul>
Regranter	<ul style="list-style-type: none"> <li>● Receive funding in accordance with the agreement (e.g., time frequency, amount)</li> <li>● Receive complete and accurate program and financial reports</li> <li>● Lead budget negotiations with funded partners</li> <li>● Participate in elucidation of funder, regranter, and funded partner roles</li> <li>● Expect funder to engage in open and consistent communication regarding expectations</li> </ul>	<ul style="list-style-type: none"> <li>● Provide funding in accordance with agreement (e.g., time, frequency, amount)</li> <li>● Communicate clearly defined vision for the project to funded partners</li> <li>● Encourage open communication about challenges within the initiative by demonstrating trust and confidence in funded partner</li> <li>● Highlight opportunities for expanding the focus of the initiative and/or collaboration with other projects/initiatives</li> <li>● Develop and manage system to ensure transparent two-way communications (i.e., communicate funder priorities)</li> </ul>

<sup>1</sup> A right is something to which one has a just claim such as the power or privilege to which one is justly entitled. - Merriam-Webster

<sup>2</sup> Responsibility is the quality or state of being responsible, such as a moral, legal, or mental accountability. - Merriam-Webster



		<p>and concerns to partners and communicate partner priorities and concerns to funder)</p> <ul style="list-style-type: none"> <li>• Amplify initiative resources by locating other related sources to support work</li> <li>• Provide non-monetary support that augments the initiative</li> </ul>
Funder	<ul style="list-style-type: none"> <li>• Receive complete and accurate program and financial reports</li> <li>• Lead budget negotiations with regranter</li> <li>• Lead in elucidation of funder, regranter, and funded partner roles</li> <li>• Be informed of regranter and funded partner missions, intended uses of funds, and capacity to use the funds effectively</li> <li>• Have access to the organization's most recent financial statements</li> <li>• Be assured funding will be used for the purposes for which it is granted</li> <li>• Be able to receive prompt and truthful answers to questions</li> </ul>	<ul style="list-style-type: none"> <li>• Provide funding in accordance with agreement (e.g., time, frequency, amount)</li> <li>• Provide clearly defined vision for the project and high-level guidance on direction</li> <li>• Identify and contract with a regranter aligned with the initiative's intent and funder's values</li> <li>• Identify and contract with a regranter the funder has confidence will manage the initiative as conceived</li> <li>• Lead development of elucidation of funder and regranter responsibilities</li> <li>• Encourage open communication about challenges within the initiative by demonstrating trust and confidence in regranter</li> <li>• Highlight opportunities for expanding the focus of the initiative and/or collaboration with other projects/initiatives</li> <li>• Provide strategic support for initiative's efforts to engage other funders</li> </ul>

\*Table note - KHA compiled these examples from existing EEFA partner rights and responsibilities, KHA's historical experience with philanthropy, publications about funder/intermediary/grantee relationships, prior recommendations from EEFA consultants, and partner visions for the future of EEFA.<sup>[1]</sup>

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[1] <https://afpglobal.org/donor-bill-rights> and <https://www.equalmeasure.org/wp-content/uploads/2020/04/8-Weaving-Partnerships-Report.pdf>