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report



Illinois Solar For All Mid-Year Report on Grassroots Education

Prepared for:
Illinois Power Agency

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Acknowledgments

ILLUME Advising, (ILLUME) LLC is a forward-thinking consulting company at the rare intersection of insight and execution. Founded in 2013, the company has quickly grown to include a deep bench of quantitative and qualitative research experts. ILLUME uses cutting-edge research strategies to help build a resilient energy ecosystem to enrich lives, improve global health, and ensure a more secure and sustainable future.

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Executive Summary

As part of the evaluation for the Illinois Solar for All (ILSFA) program, ILLUME prepared a mid-year report focused on the grassroots education component of ILSFA, including defining the success of this initiative, measuring its impact, and sharing recommendations for supporting a network of grassroots educators.

The ILSFA program makes solar installations more affordable for income-eligible Illinois residents whose gross income does not exceed 80% area median income (AMI). The ILSFA program is administered as four subprograms: Residential (Small), Residential (Large), Community Solar (CS), and Non-Profit/Public Facilities (NP/PF).

The Illinois Power Agency (IPA) was interested in learning more about how it could define and measure success for grassroots education and how well the program supports grassroots educators in their roles.

The evaluation team conducted research to address three overarching research questions:

- What are the program's goals for the grassroots education component of the program?
- How do we measure the impact and efficacy of grassroots educators?
- What are best practices for managing a network of grassroots educators?

This mid-year report's research included:

- Reviewing ILSFA program materials related to grassroots education
- Reviewing ILSFA program tracking data
- Interviewing ILSFA program staff
- Completing secondary research on other, similar programs
- Interviewing grassroots educators.

Below we summarize the key findings and recommendations from this research with more detail provided in the Conclusions section.

Key Findings

Program materials and communications do not clearly articulate overarching goals that grassroots education will help achieve. Laying out these overarching goals and their associated outcomes, as well as communicating them consistently to grassroots educators will help ensure that grassroots educators' activities support the program's goals.

Because program goals are not clearly defined, some grassroots educators are completing activities that may not support formally recognized program goals. For example, some grassroots educators are focused on addressing barriers to participation by providing hand-holding support to assist community members through the program participation processes. However, program administrators don't agree that this is a responsibility of grassroots educators.

RECOMMENDATION:

Clearly identify and communicate goals and outcomes for grassroots educators. Ensure that outcomes for grassroots educators are clearly defined and support achieving the program's long-term goals for grassroots education. Consistently communicate these goals and outcomes to grassroots educators.

Ensure that grassroots educator activities are supporting the outcomes of the grassroots education component of ILSFA. Use program theory to confirm that all grassroots educator activities support achieving the program's outcomes.

Consider making support of community members throughout the ILSFA participation process an official responsibility of grassroots educators. This responsibility would assist in achieving the program's outcome of addressing barriers to participation to increase ILSFA participation.

Some activities that grassroots educators complete do not have input from the program to support grassroots educators in completing them. There could be more alignment between activities and inputs in the program logic.

In addition, there could be enhancements to the existing support and funding for grassroots educators to better assist them in completing their responsibilities.

RECOMMENDATION:

Ensure that the program provides support to grassroots educators to complete all activities that are expected of them. For example, provide support to organizations in developing and continuing partnerships.

Encourage grassroots educators to collaborate and learn from each other. Give funding support for experienced grassroots educators to provide mentorship to organizations that would benefit from additional support or learning opportunities.

Consider providing additional funding up front to support grassroots educators in capacity building and in setting up outreach campaign strategies and structure. The onboarding and support provided should cater to the differing needs of organizations depending on their capacity and comfort with the ILSFA program.

The program administrators should track metrics that relate to the activities that grassroots educators are expected to complete and are in service of measuring progress toward goals. The evaluation team suggested a set of metrics based on the program theory logic model (PTLM).

The recommended metrics include metrics that can be tied to performance and those that should be tracked for information. Not all metrics can be tied to performance because grassroots educators face barriers that are outside their control. This includes the availability of approved vendors and CS subscriptions but also broader community, political, and market factors.

Grassroots educators requested that Elevate share the metrics it's tracking with grassroots educators. This would support grassroots educators in understanding what the program is tracking and grassroots education success, as well as offer information on how to improve grassroots educator activities.

RECOMMENDATION:

Consider tracking the recommended metrics. Pilot these metrics and gather feedback from grassroots educators on their use and the burden of relevant data collection.

Ensure that Elevate reports to grassroots educators on the metrics that the program is tracking. Sharing aggregated metrics with grassroots educators will support the program's effort to track metrics by generating buy-in and making grassroots educators part of the team.

Build flexibility into metrics. Account for barriers that are outside of grassroots educators' control.

Grassroots educators find it burdensome to track both event- and attendee-level data in Salesforce. For event-level data, Salesforce fields are confusing or difficult to complete, especially those that ask grassroots educators to enter the number of attendees that fall into certain categories. Grassroots educators expressed that, in some cases, they don't know what these fields mean. In other cases, they have difficulty estimating the number of attendees that belong in each category. Also, grassroots educators said that there is some event-level information that is useful for them to track that is not in Salesforce, such as the languages spoken by event attendees.

Grassroots educators are using their own systems to track event attendees' contact information and notes from follow-up communication. Grassroots educators said they duplicate their work to enter attendee-level information into Salesforce and said that some community members have expressed concerns about sharing their information with the program.

RECOMMENDATION:

Streamline the amount of information that the program requests in Salesforce for events.

Make it as easy and clear as possible for grassroots educators to enter the necessary information.

Consider replacing the Salesforce fields that request the number of attendees that fit into certain categories with checkboxes. For example, the form could include a question such as: "Did your outreach event aim to reach any of the following populations?" and a list of the different priority groups the program aims to reach (e.g. hard-to-reach, Spanish-speaking, over 65). The grassroots educator could then check the boxes for attendees they were aiming to reach, instead of needing to estimate the number of attendees from different populations that might have been in attendance. Ensure that the types of populations are clearly defined and are useful to the program.

Alternatively, consider looking at the demographics of communities where grassroots educator events are held (i.e. zip code or census block) to develop a proxy measure for who may be attending events.

Consider adding additional fields to Salesforce that are relevant to grassroots educators' goals, such as if an approved vendor was present at the event or the languages spoken by event attendees.

For grassroots educators that track community member information in their own systems, consider requesting information as part of mid-year or end-of-year reporting. Reporting could include aggregated, anonymous quantitative information and/or qualitative information. Qualitative information could include the reasons potential participants may be dropping out. Make recommendations to grassroots educators of what they should be tracking in their own systems.

Program administrator support and coordination is improving, but there is still room to provide additional support to grassroots educators. Grassroots educators requested additional training and onboarding support.

RECOMMENDATION:

Consider offering additional training support including more frequent trainings on topics that help grassroots educators keep up with the news.

Offer training opportunities to support grassroots educators with onboarding new employees throughout the program year. To achieve this, consider providing more frequent trainings (quarterly) that include the opportunity to easily and fully participate virtually.

Offer regular training on current events, such as the net metering transition in Illinois. As part of these trainings, educate grassroots educators on what's happening and discuss how to talk about it with community members.

Introduction and Research Approach

The ILSFA program helps income-eligible Illinois residents access the benefits of solar power. The residential programs, including Residential Solar (Small), Residential Solar (Large), and Community Solar (CS), make solar affordable for households whose gross income does not exceed 80% AMI. The Non-Profit Public Facility (NP/PF) subprogram supports access to solar installations for organizations that are located within an ILSFA-designated environmental justice community (EJC) or income-eligible community and are critical service providers. In addition, the ILSFA program also has a goal of allocating at least 25% of incentives to projects located within EJCs.

As part of the implementation of the ILSFA program, the IPA is required to direct: *“up to 5% of the funds available under the Illinois Solar for All Program to community-based groups and other qualifying organizations to assist in community-driven education efforts related to the Illinois Solar for All Program, including general energy education, job training program outreach efforts and other activities deemed to be qualified by the agency.”*

To accomplish this, the IPA created the grassroots educator portion of the program. The program administrator, Elevate, uses a competitive request for proposal (RFP) process to select grassroots educators on an annual basis.

Grassroots educators are then responsible for conducting outreach and education on behalf of the program. The goals of the grassroots educator portion of the program are to increase awareness of the ILSFA program and to build trust in the program with a focus on EJC's. In addition, grassroots educators support community awareness of job training programs.

Organizations selected as grassroots educators are existing organizations that serve a variety of communities. Some of these organizations are neighborhood based, some work with specific constituencies, and some are advocacy groups. These organizations have their own missions and goals independent of the ILSFA program's grassroots education goals. These organizations receive funding in addition to technical support and marketing support from Elevate. Grassroots educators track their outreach events in Salesforce and complete mid-year and end-of-year reports on their progress toward their goals, including the number of engagements they've completed and the numbers of attendees.

This mid-year report addresses several research questions as described below in Table 1.

Table 1. PY6 Mid-Year Report Research Questions

RESEARCH QUESTIONS	RESEARCH ACTIVITIES
<p>What are the program's goals for the grassroots education component of the program?</p> <ul style="list-style-type: none"> How do current grassroots education activities support achieving these goals? 	<ul style="list-style-type: none"> Program tracking data and materials review Interview with IPA staff Interviews with Elevate staff working with grassroots educators
<p>How do we measure the impact and efficacy of grassroots educators?</p> <ul style="list-style-type: none"> How should the program define success for grassroots educators? What metrics should grassroots educators track to document the impact and efficacy of activities? <ul style="list-style-type: none"> What metrics do grassroots educators track for community members they engage? Can these metrics be used to track whether community members go on to participate in the ILSFA program? How might the program assess whether grassroots educators are increasing their engagement in EJC's? 	<ul style="list-style-type: none"> Program tracking data and materials review Interview with the IPA staff Interviews with Elevate staff working with grassroots educators Interviews with current grassroots educators Literature and materials review of similar programs
<p>How can the program incorporate additional tactics and strategies to support grassroots educators?</p>	<ul style="list-style-type: none"> Interviews with Elevate staff working with grassroots educators Interviews with current grassroots educators Literature and materials review of similar programs
<p>How can we adjust or interpret success metrics given program limitations outside of grassroots educator control?</p>	<ul style="list-style-type: none"> Interviews with Elevate staff working with grassroots educators Three interviews with grassroots educators Secondary research

We conducted the following activities to answer our research questions:

- Completing a Literature and materials review of similar programs. These programs included:
 - Energy Trust of Oregon’s Solar Ambassadors
 - Solar on Multifamily Affordable Housing (SOMAH) Program's Community-Based Organization (CBO) Partners
 - NYSERDA Regional Clean Energy Hubs
 - City of Seattle Community Liaisons Program
 - MASSCEC EmPower Massachusetts
 - MASS SAVE Community First Partnership
 - Energize Connecticut Community Partners
 - Consumers Energy Flint Initiative
- Reviewing program tracking data and materials for the ILSFA program’s grassroots educator initiative
- Conducting one interview with IPA staff
- Conducting two interviews with Elevate staff
- Conducting three interviews with current grassroots educators

We also incorporated relevant findings from grassroots educator interviews completed for the program year five (PY5) annual report. Please see *Appendix A. Materials Reviewed* for more information on our approach and methods.

Detailed Findings

This section outlines our findings on understanding the ILSFA program’s goals for grassroots education, how the program monitors impact and efficacy, and the best practices for managing a network of grassroots educators. We highlight findings from a program-theory logic model (PTLM) the evaluation team created in support of this research. The PTLM describes the mechanisms by which the program achieves its desired short-, medium-, and long-term goals. We also review the activities, data collection, and metrics for peer programs and share insights from interviews with grassroots educators.

Grassroots Education PTLMs

ILLUME drafted a PTLM to visualize how the grassroots education component of the ILSFA program operates. The PTLM was designed as a strategic tool to:

- **Define long-term outcomes:** Map out how grassroots educator activities connect to overarching long-term outcomes to ensure that grassroots educators are completing the right activities to achieve these outcomes. Long-term outcomes are also referred to as goals in this report.
- **Visualize how program logic is intended to work:** Highlight the relationships between program inputs, activities, outputs, and outcomes, and identify any program gaps or opportunities for improvement.
- **Determine metrics:** Assess the right metrics to help the ILSFA program track progress toward success.

The PTLM has six layers that reflect the program theory from the inputs that the program provides to the long-term outcomes the program is aiming to achieve. This logic model consists of the following components:

- **Inputs:** Beginning with the bottom layer of Figure 1 and Figure 2, both below, inputs represent the material, personnel, financial resources, and support the program provides to grassroots educators that allow them to complete activities.
- **Activities:** The activities describe what work the grassroots educators are doing as part of their work for the ILSFA program.
- **Outputs:** Outputs are the immediate, tangible, and observable results of the activities. They are often structured as metrics.
- **Short-term, medium-term, and long-term outcomes:** The outcomes are the planned or expected results of the activities. Outcomes are the longer-term end goals, measured on a continuum and overtime. The outcomes are organized into timeframes:
 - **Long-term outcomes:** Big-picture goals of what the program is trying to accomplish. These are anticipated to occur over three or more program years.
 - **Medium-term outcomes:** Steps that connect short-term outcomes up to the long-term outcomes. These are anticipated to occur in the one- to three-year timeframe.
 - **Short-term outcomes:** Outcomes the program aims to see quickly to ensure progress toward long-term outcomes. These are anticipated to occur within the program year.

The evaluation team built the PTLM using findings from interviews with program administrators and interviews with grassroots educators, as well as a review of program documentation, tracking data, and grassroots educator reports. In the sections below, we first present a version of the PTLM that reflects the evaluation team's understanding of how the grassroots education component of ILSFA is currently operating. This PTLM shows where there are misalignments between program inputs, grassroots educator activities, and the desired outcomes. We also drafted an alternate version of the PTLM that suggests adjustments to the program to provide better alignment between inputs, activities, outputs, and outcomes. Based on the updated PTLM, the evaluation team recommends metrics that the program can use to track progress to its goals. This PTLM is a tool that should evolve alongside the program, incorporating changes to the program's theory and logic, including activities and intended outputs and outcomes.

Current Grassroots Education PTLM

The evaluation team used a logic model (Figure 1, below) to illustrate the grassroots education component of the ILSFA program as it currently operates, based on grassroots educator reports, program documentation, and interviews with program staff.

The PTLM illustrates that there is inconsistency in the overarching goals of the grassroots education component of the ILSFA program and the day-to-day activities of the grassroots educators. In our discussions with grassroots educators and program administrators, we found that different individuals had different perspectives on the overarching goals of the program. This leads to mismatches between the inputs the program provides grassroots educators, the activities grassroots educators are completing, and the outcomes that the program is aiming to achieve.

Mapping out the current PTLM allowed the evaluation team to identify where there are gaps in the program's design. These gaps are identified on the PTLM using white ovals.

Grassroots educators are completing some activities that the program provides funding but no additional support for. Grassroots educators are instructed to share information about complementary programs (such as bill assistance or weatherization programs) with community members they engage. However, the program does not provide grassroots educators with materials or training on complementary programs. Seeking this knowledge is time consuming for some grassroots educators, especially if they don't have prior knowledge of these programs.

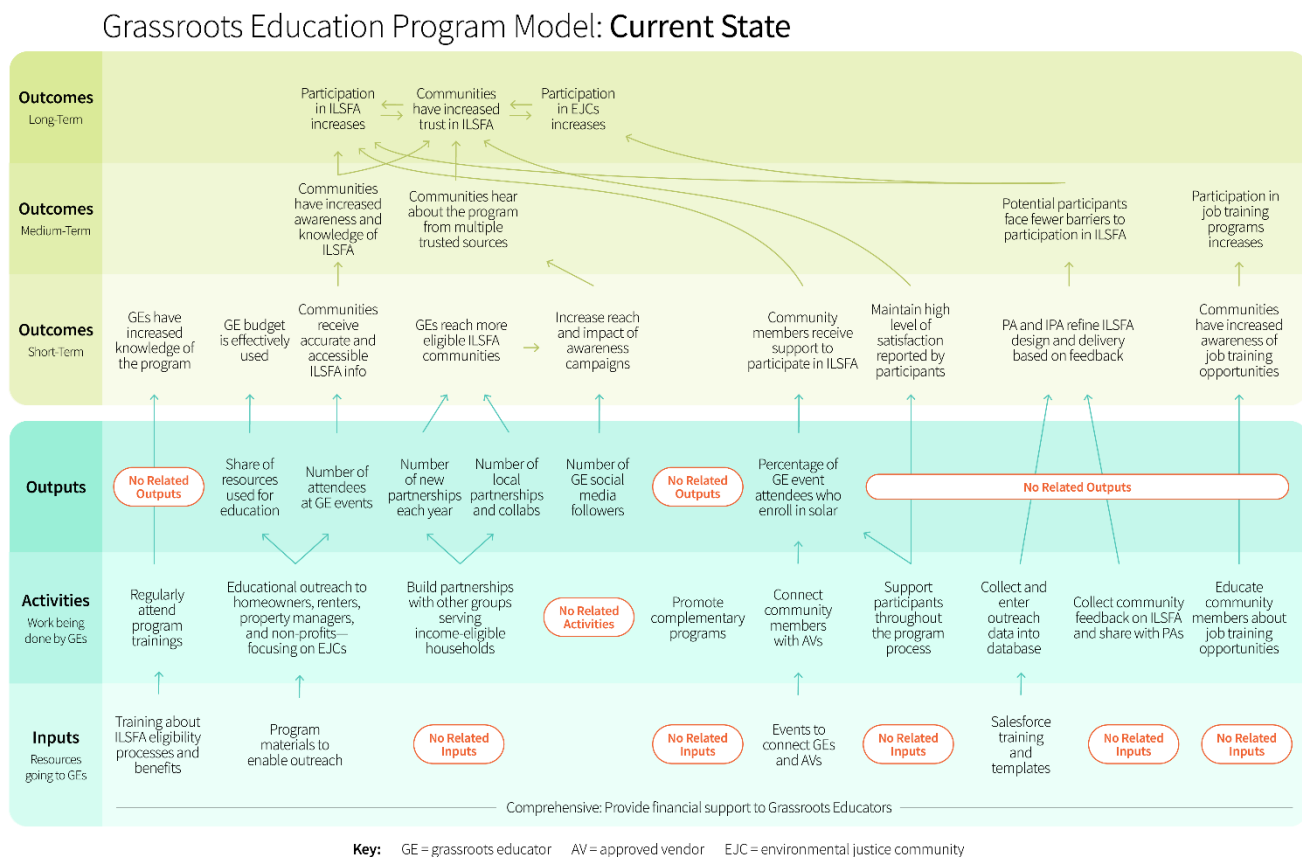
Grassroots educators also noted that supporting potential participants in making their homes solar-ready, including through the ILSFA program's Home Repairs pilot, requires a lot of time. This is due to the level of support they provide to households in finding these programs, as well as the time spent navigating the application process and addressing barriers households face to accessing home repair funds, including limited available funding and long waitlists.

The program is tracking some outputs that do not tie to grassroots educators' activities. For example, one of the ILSFA program's objectives for grassroots educators is to increase their organization's number of social media followers. However, there are no grassroots educator activities tied to social media that would support this output.

The program does not track outputs for some activities that grassroots educators are completing. Providing education about job training programs is an activity that grassroots educators complete and supports achieving an outcome. However, there is no current output specifically related to outreach on job training programs.

Despite challenges, the PTLM illustrates several areas where there is close alignment between input, activities, outputs, and outcomes. For example, the ILSFA program provides materials that support grassroots educators in completing their outreach activities. The program measures the outputs of the number of attendees at grassroots educator events, which leads to increasing awareness and knowledge of the ILSFA program that should, over time, support the long-term outcome of increasing program participation.

Figure 1. Current Grassroots Education Logic Model



View this logic model online: [Current Grassroots Education Logic Model](#)

Potential Adjustments to the Grassroots Education Component of ILSFA

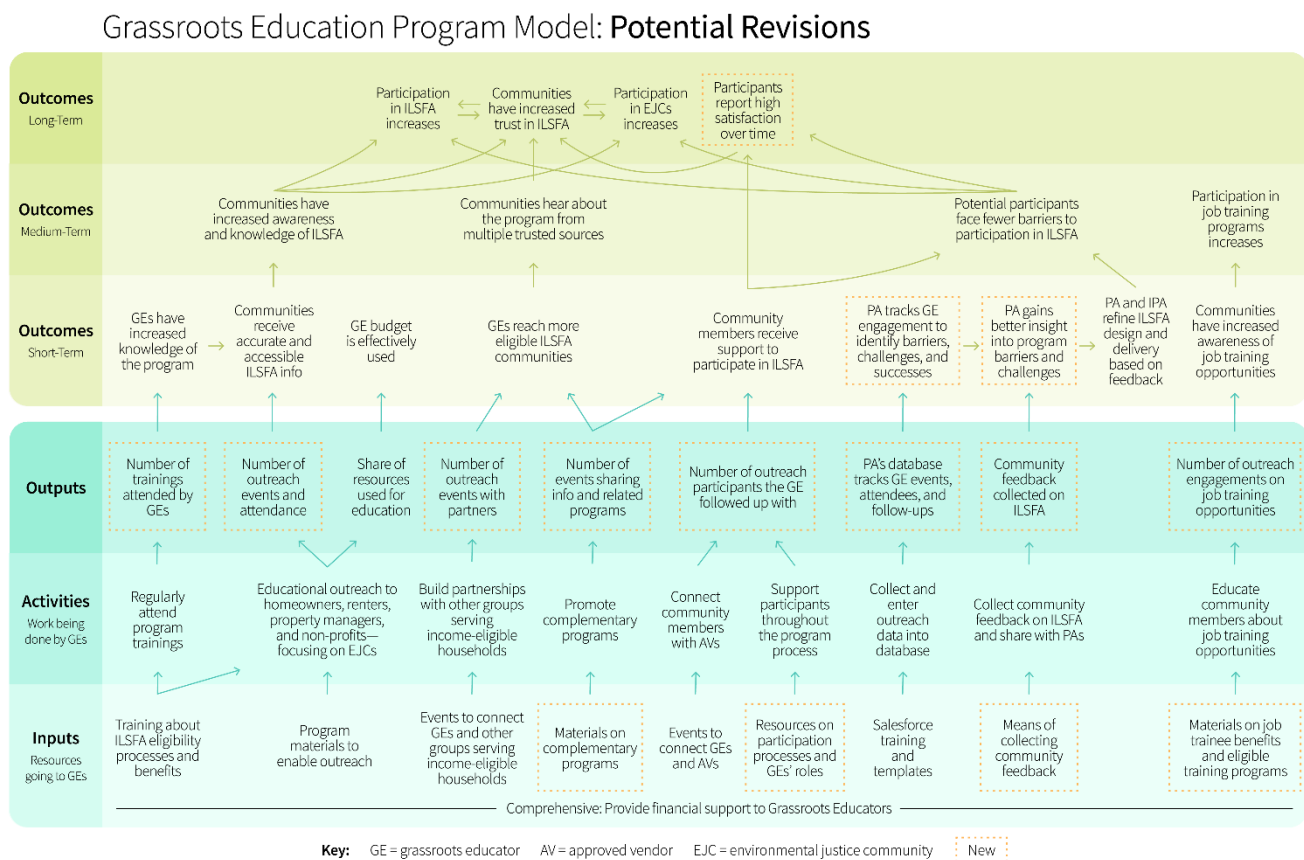
Based on the misalignments in outcomes, outputs, activities, and inputs outlined above, the evaluation team recommends updating the program logic so IPA, Elevate, and grassroots educators are more aligned on goals and responsibilities of grassroots educators (Figure 2, below).

Aligning the program logic will help the program offer resources and support to grassroots educators for all activities that are their responsibilities. For example, the program could consider providing grassroots educators with resources that outline both the program participation processes and the grassroots educators' role at each stage to support them in assisting participants through this process.

In addition, **the evaluation team suggests that the program administrator adjusts the metrics that the program tracks to be more aligned with grassroots educator activities and program goals.** There should be metrics that align with outputs for each of the activities that grassroots educators complete, and metrics should measure progress toward stated goals. The next section shares the evaluation team's recommended set of metrics.

We also recommend adjusting some of the program’s logic to ensure logical connections between the outputs to the short-, medium-, and long-term outcomes. For example, achieving a high level of satisfaction from program participants is a current objective for grassroots educators. However, we believe that this belongs in the category of long-term outcomes. Participant satisfaction is something grassroots educators can impact on in the long run, but is not a direct outcome from their work. This distinction is reflected in the next section where participant satisfaction is a recommended metric, though not one that we recommend is tied to performance. The yellow boxes show where there are changes to the PTLM from the previous version.

Figure 2. Potential Revisions to Grassroots Education Logic Model



View this logic model online: [Potential Revisions to Grassroots Education Logic Model](#)

Recommended Metrics for the Program to Track

Table 2, below, outlines metrics that can be used to assess the effectiveness of each grassroots education activity and measure progress to overarching goals. We organized the metrics by who will provide the data for the metric (IPA, program administrator, grassroots educator, or evaluator) and the type of metric it is, including:

- **Quantitative – tied to performance:** These metrics are numbers that can be tied to the performance of program actors, whether the program administrator or grassroots educators. These metrics are primarily the measurement of the resources or support that the program administrator provides to grassroots educators or the activities that grassroots educators are completing.
- **Quantitative – informal:** These metrics are numbers that provide information about the success of grassroots education but cannot be tied directly to performance or that may be influenced by factors outside of grassroots educators’ control, such as the availability of approved vendors or CS subscriptions
- **Qualitative:** These metrics are comprised of information that may be more difficult to quantify about grassroots educators’ performance or community perspectives.
- **Process-based:** These metrics are checkboxes that confirm whether certain processes are happening.

The program actor in each column is the actor who would track the data to contribute to the metrics. More detailed information on how the team developed the metrics and additional information about metrics can be found in *Appendix B. Metrics Methodology*.

Table 2. Recommended Metrics

	IPA	PROGRAM ADMINISTRATOR	GRASSROOTS EDUCATORS	EVALUATOR
Quantitative – tied to performance		<ul style="list-style-type: none"> • Number of GE trainings offered, and number of GEs who attend trainings • Number of outreach materials offered (including the number of types of materials, topics covered, and languages available) • Number of GE/AV networking events hosted, and number of GE and AV attendees • Number of participants that report learning about the program from a GE 	<ul style="list-style-type: none"> • Number of community outreach events and number of attendees (in general and in EJC’s) • Number of outreach event attendees who GEs followed up with • Number of events related to job training and number of attendees 	<ul style="list-style-type: none"> • Sources of awareness for participants
Quantitative – informational	<ul style="list-style-type: none"> • Geographic distribution of GEs, including number of GEs located in EJC’s • Number of participants/ projects across subprograms • Number of participant s/ projects in EJC’s 	<ul style="list-style-type: none"> • Number of GEs that deliver information about complementary programs • Number of outreach events and materials distributed in different regions of Illinois • Number of projects in geographic areas that GEs serve • Number of projects in EJC’s • Number of job trainees in communities served by GEs 	<ul style="list-style-type: none"> • Proportion of funding GEs spend on outreach events • Number of partners GEs are working with • Number of events or amount of outreach delivered alongside partners • Amount of outreach completed alongside complementary programs • Number of events with an AV present • Number of outreach attendees the GE connected with an AV (estimated okay) • Number of attendees that went on to participate in ILSFA (estimated okay) 	<ul style="list-style-type: none"> • Satisfaction reported by participants

	IPA	PROGRAM ADMINISTRATOR	GRASSROOTS EDUCATORS	EVALUATOR
Qualitative			<ul style="list-style-type: none"> • GEs' self-reported understanding of program offerings • GEs' perspective on knowledge of job training in their communities • GEs' perspective on the proportion of people they speak with that have heard about ILSFA • GEs' perspective on trust in ILSFA among eligible communities • GEs' estimate of the number of community members they work with who do not participate due to participation barriers or challenges 	<ul style="list-style-type: none"> • Future potential: General awareness of ILSFA among eligible communities • Measure of trust among eligible communities
Process-based metric		<ul style="list-style-type: none"> • The program offers the GEs an opportunity to provide input on materials and incorporates suggestions • Elevate is analyzing GE feedback on a regular cadence to make recommendations for program improvement 	<ul style="list-style-type: none"> • GEs are entering data into Salesforce • GEs are sharing community feedback on the program 	

GE = grassroots educator

AV = approved vendor

EJC = environmental justice community

View a more detailed version of this metrics table: [Recommended Metrics](#)

Peer Program Goals, Activities, and Metrics

Our team conducted a review of similar energy-related programs that partner with CBOs to conduct program outreach and engagement. We reviewed these programs to understand:

- Their goals
- Activities they conduct to reach these goals
- How these goals are measured
- Whether these programs face similar challenges to ILSFA in achieving these goals
- Their best practices for managing grassroots educator networks

Since there is more limited publicly available information about these programs, we do not distinguish between short-, medium-, or long-term outcomes but rather just refer to the overarching goals of each initiative.

Our findings are below; we compare peer programs' goals, activities, and metrics (including data collection) to the goals, activities, and metrics of the ILSFA program to determine how aligned it is with similar programs. These sections line up with the PTLM layers of outcomes (goals), activities, and outputs (metrics). Throughout this section, we recommend places where the ILSFA program should consider aligning with peer programs.

Goals

We reviewed and compared the goals of peer programs to the goals of the ILSFA grassroots educator initiative to determine where the goals align and where there are differences.

Overall, peer programs had similar goals to the grassroots education component of the ILSFA program. Specifically, programs commonly aim to increase participation in an existing clean energy offering by having trusted CBOs share information about that offering. This is like the model of partnering with grassroots educators to promote the ILSFA program and solar options. Often, programs have a goal of increasing participation among a priority population that may be underserved by existing program offerings. This is like the ILSFA program's grassroots educator role of increasing participation in EJC's.

In some cases, CBOs are solely aiming to increase awareness, understanding, and trust in program offerings. In others, grassroots educators endeavor to support individuals and businesses in overcoming barriers to participation by helping them navigate program processes. While many of the ILSFA program's grassroots educators support participants in navigating the participation process, these activities are not currently directly tied to the grassroots educator initiative's outcomes.

Activities

Many activities conducted by CBOs for peer programs are similar to those that grassroots educators do for the ILSFA program (Table 3). However, there are some services that CBOs provide for peer programs that the ILSFA program could consider including in the scope of grassroots educator activities. As noted in the PTLM section, we recommend the program provides support (inputs) to grassroots educators in completing the activities they are responsible for.

Table 3. Activities that Grassroots Educators and CBOs Complete for ILSFA and Peer Programs

	ILLINOIS SOLAR FOR ALL (ILSFA)	REGIONAL CLEAN ENERGY HUBS	COMMUNITY FIRST PARTNERS	ENERGIZECT COMMUNITY PARTNERS	SOMAH PROGRAM CBO PARTNERS	SOLAR WITHIN REACH SOLAR AMBASSADORS	COMMUNITY LIAISONS PROGRAM	COMMUNITY CONNECTIONS PROGRAM
Promoting awareness of energy programs	X	X	X	X	X	X	X	X
Adapting and delivering in-language outreach presentations	X		X				X	X
Partnering with other organizations to increase efficacy of outreach	X			X				
Helping residents and businesses determine if they could benefit from participation	X	X						
Guiding customers through participation processes	X	X	X					
Referring individuals to job training programs	X	X			X			
Providing community feedback to program administrators	X		X					X
Connecting residents with complementary programs	X	X						
Organizing community-scale or community-based social marketing campaigns		X	X					
Supporting evaluation or program improvement		X	X				X	
Translating and proofreading program materials							X	

Note: A bolded “**X**” is a formal grassroots educator responsibility, and a light “X” is an activity that some grassroots educators are completing that is not formalized.

Some of the reviewed programs engage CBOs in activities that are not currently part of the grassroots educator role. For example, some programs offer opportunities for CBOs to support evaluation activities or other work to collect feedback and improve programs. NYSEERDA's CBO partners, the Clean Energy Hubs, incorporated public engagement and their own insights into the Regional Assessment and Barrier Analysis (RABA) reports. These reports explored challenges to and opportunities for expanding access to energy programs and energy job opportunities in disadvantaged communities across the state of New York. Through these reports, the CBOs provided recommendations to NYSEERDA to make its programs more accessible and aligned with community needs. NYSEERDA also created a feedback tracker to hold and organize feedback. The feedback tracker is updated as the programs respond to the feedback, and NYSEERDA notifies the CBO that provided the feedback afterward. The feedback tracker will be publicly available to make it easy for stakeholders to monitor.¹

RECOMMENDATION:

The ILSFA program should consider providing funding for grassroots educators to support collecting program feedback, assisting with evaluation efforts, and helping prioritize program improvements. We recommend considering ways to include grassroots educators in the collection of community feedback, such as providing a formal way for grassroots educators to report feedback through a form or their annual reporting or through focused feedback collection meetings. We also recommend including grassroots educators in evaluation research and ensuring that they can be compensated for this work. For example, grassroots educators could help the evaluator contact participants or serve as a gathering location for in-person research, such as focus groups. In addition to offering more support to grassroots educators to collect feedback and support evaluation processes, the ILSFA program should report back to grassroots educators on the outcome of the feedback they've provided as well as on evaluation findings.

Peer programs also work with CBOs to improve their programs' marketing materials, including creating testimonials and translating materials. For example, NYSEERDA is working with Clean Energy Hubs to create testimonials from program participants to offer relatable forms of information. The city of Seattle works with its community liaisons to translate and proofread documents to ensure the materials are appropriate to engage communities that speak languages other than English. These community liaisons also provide interpreting at events.

¹ Industrial Economics, Inc. 2024. "Regional Clean Energy Hubs Market Evaluation and Baseline Customer Survey: Report" Accessed at: <https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/Publications/PPSER/Program-Evaluation/Matter-No1602180NYSEERDARegional-Clean-Energy-Hubs-ImpactReportSeptember-2024.pdf> [PDF]

RECOMMENDATION:

Consider calling on grassroots educators to assist in creating testimonials, translating and proofreading program documents, and partnering with Elevate for Bright Neighborhoods events. Most importantly, compensate grassroots educators for this work.

Some programs formalize community partners' roles to support individuals and non-profits in navigating program processes. While this is something that some grassroots educators are doing, it is not a formal responsibility.

RECOMMENDATION:

We recommend formalizing in their contracts the role that grassroots educators play in helping potential participants through the participation process.

Metrics and Data Collection

Peer programs are using similar metrics to the ILSFA program to measure their success, impact, and outcomes. It's important that metrics follow from the activities that grassroots educators are completing and that they measure progress toward stated goals. While there are metrics that the ILSFA program is aligned with, there are additional metrics that peer programs either track or have been recommended by evaluation reports to track that could be beneficial for the ILSFA program to track, as well.

Below, we share metrics that peer programs collect and track for IPA's consideration. However, based on our understanding of the ILSFA program's goals, activities, and inputs, we don't see all these metrics as supporting tracking the core outcomes of the program. Table 4 notes metrics that align with the program's logic and the metrics that the program is already tracking.

Table 4. Metrics Used by Peer Programs, Alignment with Program Logic, and ILSFA Tracking

METRIC USED BY PEER PROGRAMS	METRIC ALIGNS WITH PROGRAM LOGIC	ILSFA ALREADY TRACKS METRIC
Geographic diversity of grassroots educators	X	
Number of grassroots educators based in EJC's	X	X
Number of grassroots educator partners and diversity of grassroots educator partnerships (in terms of geographically, type of organization, communities served)	X	
Amount of funding that grassroots educators receive	X	X
Baseline awareness of solar opportunities (participation, familiarity, barriers) within EJC's, characterized by using surveys, IDIs, or grassroots educators' perspectives		
Number of communities that received outreach	X	
Amount of outreach in EJC's	X	
Number of projects completed after a participant interacted with or received support from a grassroots educator *	X	
Number of projects in areas where grassroots educators work compared to previous years	X	
Number of projects completed in EJC's year over year	X	
Self-assessment by grassroots educators of the work they've done and the progress they think they're making	X	X
Grassroots educators' feedback on outreach efforts, including their feedback on program awareness and interest among communities	X	
Feedback from grassroots educators on partnerships		
How participants heard about the program, asked on intake forms	X	
Participant satisfaction or experience scores based on surveys, IDIs, or focus groups	X	X

*Some programs note that this is difficult to measure and that the number represents only a portion of these projects that can be captured; we recommend requesting this information, potentially estimated, from grassroots educators

Note: We have modified some of these items to be more relevant to the ILSFA program.

The evaluation team recommends that grassroots educators collect data to support tracking metrics. For a program with similar data reporting requirements, the evaluation found that, in general, most community partners did not find the reporting requirements arduous although some described these requirements as annoying or burdensome.

Energy Trust of Oregon has a unique approach to metrics in its Solar Ambassadors and Community Partner Funding programs. The program administrator recognizes that **some target metrics might be challenging for community partners to meet and that success may take time.** Program contracts provide community partners with protection against negative consequences for not meeting targets.

RECOMMENDATION:

The ILSFA program could take a similar approach with grassroots educator contracts to account for different organizations' capacity and preexisting knowledge of the ILSFA program as well as factors outside of their control, such as the availability of approved vendors or CS subscriptions. We have built this concept into our recommended metrics by including both metrics that can be tied to performance and those that should be evaluated for informational purposes.

Peer Program Case Studies

Peer programs face similar challenges to those faced by grassroots educators and Elevate in the ILSFA program. These include challenges coordinating between the program administrators and the community partners as well as a lack of availability of program participation opportunities. The following case studies provide an overview of some of the relevant challenges and recommended solutions for peer programs that could provide possible approaches for the ILSFA program.

NYSERDA Case Study: Coordination Between the Community Administrator and Partners

NYSERDA developed the Regional Clean Energy Hubs Initiative in 2022 as part of its overall strategy to assist New York State residents with learning about and accessing clean energy services, including strengthening the participation of disadvantaged communities in the clean energy economy.² Each of the Hubs is a CBO and non-profit organization that serves as the center of a network with one prime contractor organization and a series of subcontractor organizations collectively providing education, application support, project management support, workforce development opportunities, or other resources to customers in their respective regions.

In a recent evaluation, Hubs expressed that they were facing similar challenges as those the ILSFA program's grassroots educators have shared, including logistical hurdles that slowed progress and challenges in communication between the Hubs and NYSERDA.³

² NYSERDA. Accessed 2025. "Regional Clean Energy Hubs." Accessed at: <https://www.nyserda.ny.gov/All-Programs/Regional-Clean-Energy-Hubs>

³ Industrial Economics, Inc. 2024. "Regional Clean Energy Hubs Market Evaluation and Baseline Customer Survey: Report" Accessed at: <https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/Publications/PPSER/Program-Evaluation/Matter-No1602180NYSERDARegional-Clean-Energy-Hubs-ImpactReportSeptember-2024.pdf> [PDF]

Below, we summarize key challenges or areas for growth and recommended solutions or solutions that NYSERDA came up with based on the recommendations.

Area for growth: Potential for NYSERDA to identify opportunities to further support collaboration and engagement between the Hubs.

- **Solution:** The Hubs implementer developed a Microsoft Teams site for the Hubs' organizations to facilitate real-time discussion via chat among Hubs, distribute program information, and gather feedback collaboratively.
- **ILSFA program connection:** Grassroots educators have expressed that collaboration is useful, and they would appreciate more opportunities for collaboration. Offering a platform for easy and quick communication between the grassroots educators, like a chat in Teams or Slack, could support this need. It could also be a useful platform for program administrators to share program updates with the grassroots educators or to solicit feedback.

Challenge: Hubs expressed that they receive inconsistent or opaque messaging from NYSERDA and cannot rely on receiving timely information.

- **Solution:** NYSERDA implemented a feedback tracker to record feedback heard from Hubs on both communication with NYSERDA and program-specific feedback and to support NYSERDA in identifying areas of improvement.
- **ILSFA program connection:** Grassroots educators have also expressed frustration regarding their communications with programs administrators. The program administrators could consider implementing a feedback tracker to organize the feedback shared by grassroots educators through meetings and mid-year and end-of-year reports and to document the program's responses to address that feedback.

Challenge: Consumers in disadvantaged communities are aware of renewable energy generation but require evidence of tangible benefits to make informed decisions about purchases.

- **Solution:** NYSERDA is currently working with the Hubs to develop customized case studies and testimonials as well as consumer-facing materials on living in an energy efficient home to provide potential program participants with a better idea about the cost savings that they can expect.
- **ILSFA program connection:** Grassroots educators have shared that testimonials are helpful resources to support community members in understanding the benefits of the ILSFA program and how participation might impact their bills. Consider partnering with grassroots educators to support creating geographically diverse testimonials, especially for homes in EJC's. The ILSFA program's guaranteed bill savings are a unique component of the program that can support community members in understanding how participation will offer tangible benefits on their bills. Consider emphasizing this guarantee as part of testimonials.

Challenge: Hubs requested additional functionality in Salesforce, including the ability to track an individual's application to see their progress through NYSERDA's system and better serve the customers that contact them for updates on their application process.

- **ILSFA program connection:** Some grassroots educators have reported that they do not like to use Salesforce for tracking individuals and that the program may not have good visibility into an individual's process through the program because much is handled through the

approved vendor. Because of this, we do not think there is an applicable recommendation, but wanted to provide this stakeholder feedback on Salesforce use as a point of comparison.

EnergizeCT Case Study:

EnergizeCT's Community Partnership Initiative awards funding to CBOs, non-profits, and municipalities to promote four of EnergizeCT's energy efficiency programs to community members.⁴ Specifically, the Community Partnership Initiative aims to increase participation within historically underserved populations including customers with limited English proficiency, renters, customers with low to moderate incomes, and customers living in distressed communities as designated by the Department of Economic and Community Development.

A recent evaluation report explored potential solutions to challenges facing that initiative that are like challenges that the ILSFA program's grassroots educators are experiencing.⁵ Below, we summarize the challenges and recommended solutions.

Challenge: Community partners have found that the utility's review of marketing materials is onerous and can delay timing for outreach and events.

- **Recommendation:** Provide customizable templates to minimize the amount of time spent revising materials, thereby allowing community partners to spend more time and resources on other outreach activities.
- **ILSFA program connection:** Grassroots educators have said that the lengthy process for materials approval holds them back when conducting outreach. Consider implementing templates to support grassroots educators in creating materials and support Elevate in speeding up its materials review.

Challenge: Some of the partner organizations or municipalities had previous experience participating in similar programs and therefore needed relatively less onboarding and support throughout the program cycle. Others were less familiar with an initiative of this kind.

- **Recommendation:** Consider multiple levels of partnership and onboarding options to address the different needs of community partners who are familiar with Energize CT and/or operate in a similar area (e.g. environmental advocacy) versus those who are newer or in a more different topic area.
- **ILSFA program connection:** Grassroots educators come to the ILSFA program with different levels of knowledge about it and different organizational capacity to support grassroots educator work. Consider opportunities to tailor onboarding to different grassroots educators based on their needs, such as offering "beginner" and "experienced" tracks at onboarding and training events.

⁴ EnergizeCT. Accessed 2025. "Community Partnership Initiative Overview." Accessed at: <https://energizect.com/resources-for/community-partners>

⁵ ILLUME Advising. 2022. "Connecticut Education, Workforce Development, and Community Engagement Evaluation." Accessed at: [CT-X2022_EngagementWorkforceEvaluationReport_7October2022_final.pdf](#) [PDF]

Challenge: Community partners shared that, in some cases, the Energize CT programs were oversubscribed. Partners were able to move outreach forward on their end, but once they signed participants up, there were long waits or people were declined due to lack of available funding.

- **Recommendation:** Consider carving out program funding specifically to support participation driven through the community partnerships initiative.
- **ILSFA program connection:** Grassroots educators have expressed that they struggle to sign community members up for the CS subprogram due to a lack of available subscriptions. Because of the long timelines for CS project development, reserving subscriptions for individuals who work with grassroots educators likely is not applicable to the ILSFA program. However, the PY6 evaluation report did recommend that the program continue to work on offering grassroots educators better visibility into CS subscription availability to help them know when to promote the offering.

Challenge: Community partners noted that it can require an initial investment to get outreach underway and requested the initiative provides more funding up front to enable those start-up activities. One partner suggested that the initiative provide them with funding to hire a local community organizer who can help establish trust and represent the needs of their local community.

- **Recommendation:** Consider allocating more funding to community partners up front instead of paying out funding at project milestones, which is the current program structure.
- **ILSFA program connection:** Grassroots educators have also faced challenges in hiring and training staff and beginning outreach activities, especially for organizations that are smaller or don't already have outreach staff. Consider offering up-front funding to support these organizations in the start-up phase.

Grassroots Educator Perspective

The evaluation team conducted in-depth interviews with three ILSFA grassroots educators who complete work across the state of Illinois. All three organizations conducted outreach on the three residential subprograms, and one also did outreach to non-profits. One organization has an outreach team that is dedicated to energy efficiency, decarbonization, and clean energy education alongside ILSFA program-related outreach.

Like other sections, we structured our findings from the grassroots educators around their understanding of ILSFA program goals, the activities they undertake to complete these goals, the data and metrics they collect to track their support, and how the program administrator supports them in these activities.

Goals

Interviewed grassroots educators and staff from the IPA and Elevate agreed that the goals of the grassroots education component of the ILSFA program are to build trust, awareness, and understanding of the program, with a focus on EJC's. However, there were areas where these program actors reported different understandings of goals for grassroots education, showing a lack of alignment.

Grassroots educators understood their goals to additionally include:

- Raising awareness of and participation in job training programs among communities;
- Reducing barriers to participation by supporting potential participants through the participation process; and
- Supporting community members by sharing information about complementary programs.

However, program administrator staff thought these goals were outside of grassroots educators' scope.

This lack of alignment leads to confusion among grassroots educators, which results in grassroots educators completing an inconsistent set of activities. Some of these are related to the formally recognized goals of the program, while others are related to goals that have not been formalized. Other times still, grassroots educators conduct these activities because they have identified an area where community members need support. For example, the program administrator thinks that the goal of removing barriers to participation by supporting community members through the participation process should primarily belong to Elevate, rather than grassroots educators. However, grassroots educators emphasized this as an important part of their support to community members to help them move from awareness to participation. Some grassroots educators also noted that goals weren't consistently communicated to them, furthering their confusion about what the program is aiming to accomplish with grassroots education and what activities are within grassroots educators' responsibilities.

Activities

Grassroots educators mostly complete activities that support the goals of the program. However, there are some activities grassroots educators conduct that the program is not providing support for. Grassroots educators requested additional support in conducting these activities.

Overall, while all grassroots educators were conducting activities to support raising outreach and awareness of the ILSFA program, some were completing additional activities including conducting outreach for job training programs, supporting community members through the ILSFA program participation process, and creating partnerships with organizations to promote complementary energy and income-eligible services. The program should allow some space and flexibility in the activities the grassroots educators complete, as this allows grassroots educators to customize their support to the specific needs of their communities.

However, there are several activities the grassroots educators are completing for which they would like additional support from the program. These include the following:

- **Some grassroots educators are struggling with attendance** at their events, such as workshops. They would appreciate support from Elevate to help them improve attendance at their events.
- Grassroots educators have had success partnering with other organizations (that are not grassroots educators) to host outreach events and recruit attendees. However, they expressed that **it is hard to sustain these partnerships** and sometimes, after hosting

successful events in partnership with another organization, they'll struggle to hear back from that organization to continue partnering.

- Grassroots educators shared additional support that would help them **increase collaboration across organizations**, such as providing funding for experienced grassroots educators to mentor their peers.
- Grassroots educators emphasized that the work of **supporting community members through the ILSFA program participation processes is time consuming**, and it can be difficult for them to build capacity for staff members to have the time to provide this type of individualized support. Grassroots educators didn't mention directing people to the program administrator for support, which is how the program is intended to work. In fact, one grassroots educator shared that it is important to them to continue working with community members who they've built trust with rather than passing them off to a program administrator for support. Grassroots educators would appreciate support from Elevate in the form of providing resources with a clear outline of the participation processes and grassroots educators' role at each stage.
- Some grassroots educators are working to **increase the number of approved vendors in the Residential Solar (Small) subprogram** by helping approved vendors that have indicated an interest in working in that subprogram and supporting new approved vendors with coaching. The program can complement grassroots educator work in this area by continuing to improve support to approved vendors and by working to address issues that prevent approved vendor participation in the Residential Solar (Small) subprogram.
- Grassroots educators shared that they **struggle to find good employees** to do the grassroots education work. This is not as difficult for larger organizations that already have staff devoted to outreach, but it is a challenge for small organizations. The program could consider providing additional start-up funding to organizations that are new to their role as grassroots educators to support them in hiring and training staff.
- Grassroots educators requested additional training support, including **more frequent training (quarterly) that offers more opportunities to participate virtually**. This would allow for smoother onboarding of subcontractors or employees throughout the year.
- Grassroots educators also requested support **keeping up with the news and changing legislation**, such as the net metering transition in Illinois. This support could include sharing resources on what's happening and instructions on how to talk about it with community members.

Grassroots educators shared that Elevate has improved its support of grassroots educators.

They said that office hours have improved to be more useful, that Elevate has been more responsive, and that it has been smoother getting marketing materials approved.

Data Collection

Grassroots Educators generally find data tracking requirements in Salesforce to be burdensome and are often using their own systems to track data. For example, when entering event-level data into Salesforce, grassroots educators are asked to enter the number of different types of customers they engaged with (such as the number of low-income or "new audience" attendees).

Grassroots educators said that some of the fields have not been defined (e.g. “hard-to-reach”) or that they don’t know what the fields mean (e.g. “complementary program information shared”). They also noted they currently use guesses or estimates to fill out fields such as the number low-income attendees, as they don’t want to ask participants to provide income information just to attend an event.

Elevate has recently started offering an online-hosted form that event attendees can fill out, called an Exit Ticket, that populates their information into Salesforce. However, none of the grassroots educators that we spoke with currently use the Exit Ticket to collect attendee contact information primarily due to concerns about the privacy of event attendees. One grassroots educator said that community members can be uncomfortable sharing their information due to fears that it will be shared with other organizations or institutions without their permission. Another grassroots educator was not using the Exit Ticket because they were concerned that Elevate would contact these attendees and confuse them as the grassroots educator is the organization the attendee has the relationship/contact with.

Grassroots educators have varied practices for collecting contact information from event attendees. Some have been doing this as part of their role as a grassroots educator for a long time, and it is a newer goal for others. Interviewees said that they typically collect contact information using a paper sign-in sheet. Grassroots educators typically keep their data collection to a minimum asking for a name, phone number, and email address but not the home address or other, more personal information. They reported that event attendees are usually comfortable sharing their information in this format.

Due to these barriers, grassroots educators are using their own systems to track who they interact with at events and any follow-up with those attendees, resulting in duplicate work when they enter this information into Salesforce. The information collected and systems used by grassroots educators depend on the types of engagements they’re conducting, their internal systems, and what their goals are. The systems range from organization-hosted Salesforce instances to Excel spreadsheets.

Grassroots educators were interested in sharing qualitative data with the program. Many organizations collect and share this information internally, but they don’t have a formal mechanism to share this with Elevate. One grassroots educator recommended that Elevate use the notes in Salesforce to capture qualitative feedback about whether an event was particularly good or particularly bad. Another grassroots educator preferred to share this type of feedback during a meeting with Elevate. The IPA is also interested in tracking qualitative information on grassroots educator efforts. We recommend specific qualitative information to track in Table 2, above.

Metrics

Grassroots educators are using different metrics to measure their own success than those used by the program. For example, one grassroots educator measured their success by the number of people that follow up after outreach engagements to ask how they can move forward with the ILSFA program. Another grassroots educator is focused on the number of people who they have supported and who have successfully participated in the ILSFA program.

Those grassroots educators that are collecting attendee information and completing follow-up to support participation know who has gone on to participate in the ILSFA program. Other grassroots educators don't track this information.

Grassroots educators said that it would be helpful for Elevate to share with the grassroots educators the metrics that they track related to grassroots education. In addition, it would be helpful to understand what Elevate is learning qualitatively, such as what questions Elevate is getting through its call center about the ILSFA program.

Conclusion

Grassroots educators play an important role in the ILSFA program's success by working to increase participation and trust in ILSFA. While the program and grassroots educators seem to be aligned on this goal, there are opportunities to better align all parties around the full set of short, medium, and long-term outcomes; the activities needed to accomplish these goals; how the program will measure success; and what support the program provides. Specifically, the program can clarify the goals of the grassroots educator portion of the program, which will allow grassroots educators to complete activities that support the program's desired short-, medium-, and long-term outcomes. With clear activities for grassroots educators, program staff can also make sure they are providing appropriate support to grassroots educators and tracking metrics that measure the success of their activities. Grassroots educators and program staff aligning on these items will allow both parties to better communicate about what the program is trying to accomplish, adjust, and help the program better reach its goals.

Appendix A. Materials Reviewed

The evaluation team researched 13 programs during the secondary research and provided findings on 10 based on publicly available information or internal ILLUME reports:

- Energy Trust of Oregon’s Solar Ambassadors
- Solar on Multifamily Affordable Housing (SOMAH) Program's Community Based Organization (CBO) partners
- NYSERDA Regional Clean Energy Hubs
- City of Seattle Community Liaisons Program
- MASSCEC EmPower Massachusetts
- MASS SAVE Community First Partnership
- Energize Connecticut Community Partners
- Consumers Energy Flint Initiative

In addition to the program websites, we reviewed the following evaluation reports, community partner reports, and articles related to the above programs:

- Industrial Economics, Inc. 2024. “Regional Clean Energy Hubs Market Evaluation and Baseline Customer Survey: Report” Accessed at: <https://www.nyserda.ny.gov/-/media/Project/Nyserda/Files/Publications/PPSER/Program-Evaluation/Matter-No1602180NYSERDARegional-Clean-Energy-Hubsl-ImpactReportSeptember-2024.pdf> [PDF].
- ILLUME Advising. 2022. “Connecticut Education, Workforce Development, and Community Engagement Evaluation.” Accessed at: [CT-X2022_EngagementWorkforceEvaluationReport_7October2022_final.pdf](https://www.illumeadvising.com/CT-X2022_EngagementWorkforceEvaluationReport_7October2022_final.pdf) [PDF].
- Verdant Associates, LLC. 2023. “Solar on Multifamily Affordable Housing Second Triennial Report.” Accessed at: https://www.cpuc.ca.gov/-/media/cpuc-website/divisions/energy-division/documents/somah/2023_triennial_report_second_somah.pdf.
- Energy Trust of Oregon. Accessed 2025. “Solar Ambassadors bring opportunities to communities of color”. Accessed at: <https://www.energytrust.org/success-stories/solar-ambassadors-bring-opportunities-to-communities-of-color/>.
- Insider. Accessed 2025. “Community Partner Funding.” Accessed at: https://insider.energytrust.org/programs/home-retrofit/community-partner-funding/?_gl=1*_lgoa2p*_gcl_au*MTEzNTA0MTQxMi4xNzM4Mjg2MzU4.
- Clean Energy States Alliance. 2023. “Investing in Relationships: Strategies for State Agencies to Equitably Partner with Communities” Accessed at: [community-engagement-models-energy-trust-oregon.pdf](https://www.illumeadvising.com/community-engagement-models-energy-trust-oregon.pdf).

To better understand NYSERDA’s Regional Clean Energy Hubs RABA reports, we reviewed reports from some regions, including:

- [Regional Assessment and Barriers Analysis \(RABA\) for the Manhattan Regional Clean Energy Hub — Pratt Center For Community Development](#)
- [Regional Assessment & Barriers Analysis \(RABA\) - Smart Energy Choices](#)
- [RABA – WNY Clean Energy Hub](#)

We also reviewed reports and articles with information about grassroots education and partnering with community partners:

- American Council for an Energy-Efficient Economy. 2017. “Making a Difference: Strategies for Successful Low-Income Energy Efficiency Programs.” Accessed at: <https://www.aceee.org/sites/default/files/publications/researchreports/u1713.pdf>.
- NREL. 2018. “Design and Implementation of Community Solar Programs for Low- and Moderate-Income Customers.” Accessed at: <https://www.nrel.gov/docs/fy19osti/71652.pdf>.

Appendix B. Metrics Methodology

To define metrics, our team used the [Barr Foundation grantee guide](#) for developing and evaluating metrics. It recommends including the following pieces of information in every metric:

1. *Who* will complete the output or be the beneficiary of the outcome?
2. *What* is the activity or result expected to be achieved?
3. *By when* will it occur?
4. *How much* will be done or accomplished (i.e., how many or what percent)?
5. *How will we know* if the result was achieved?

Based on this framework, we suggest the following questions to consider when designing or selecting metrics, adapted to be relevant to the ILSFA program:

- Is this metric connected to the grassroots educators' activities? Is this result something that we can reasonably believe is connected to grassroots educator efforts?
- Will the result be visible or measurable in the grassroots educator contract timeframe? If not, are there other leading indicators that might be more feasible to monitor and report on instead?
- How accessible and timely is the data we need? Is the information already available in some way, or is a special effort needed to collect it? Is the cost for this data collection and analysis included in the IPA/Elevate/grassroots educator budgets? Will that data be valuable to grassroots educators and their stakeholders beyond reporting to program administrators?
- Will the metrics help to inform of the next steps or be actionable in some way?

If the IPA wants to adjust recommended metrics, including revisiting them over time, this framework could be used to guide updated metrics.