Dow Sustainability Fellowship
Final Project Report

December 2022

TEAM 7
Energy Equity
Researchers
Collaborative Fellows

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Photo Credit: Canva

Faculty advisor: Justin Schott
Client: Energy Equity Researchers
Collaborative
Client liaison: Jacquie Moss
Client advisors: Will Bryan, Bobuchi
Ken-Opurum, Amanda Dewey
Location: Nationwide

Sustainability Challenge
This project focuses on energy equity, which seeks to resolve the inequitable distribution of costs and benefits in energy efficiency and renewable energy investments. Energy equity work supports the establishment of fair and justice-oriented energy investments in frontline communities. Specifically, the energy equity work of our client addresses the following: 1) Incorporating justice into the entire life-cycle of energy projects (including decommissioning); 2) The justice challenges perpetuated by the renewable energy transition (e.g., a lack of community consultation and participation in decision-making); and 3) The need to address energy poverty in Black, Indigenous, and People of Color (BIPOC) and frontline communities through energy efficiency and clean energy initiatives (e.g. weatherization and home retrofit projects).

Energy Equity Researchers Collaborative Background
Justice40, the signature environmental justice initiative of the Biden Administration, requires that at least 40% of the benefits of clean energy investments go to "disadvantaged communities." State public utility commissions (PUCs) are also proposing new requirements for equity targets that will influence hundreds of billions in investments and determine the extent to which historically impacted BIPOC and frontline environmental justice communities can participate in the clean energy transition. Thus, there is an urgent need for energy equity metrics, but only a small number of academic, government, and non-profit researchers and practitioners are creating and disseminating these metrics. To respond to this growing need and limited organizational capacity, the Energy Equity Project (EEP) and the American Council for Energy-Efficient Economy (ACEEE) came together "to identify priorities for a potential future energy equity metrics collaborative" and thus formed the Energy Equity Researchers Collaborative (EERC).

Project Goal and Scope of Work
Our project supported the development of internal processes and infrastructure, helping the EERC form a cohesive coalition for facilitating standardized energy equity metrics and data. Our original scope of work included: 1) Co-designing a communication strategy based on membership interviews and key recommendations to support future Collaborative convenings; 2) Conducting a landscape analysis of existing energy equity and justice (EEJ) organizations and initiatives to develop a network map to help the Collaborative expand its outreach; 3) Supporting authentic relationship-building with BIPOC and frontline organizations through listening sessions and the development of a list of antiracist and anti white supremacy resources.

Membership Interviews
To support the Collaborative's organizational process development, we conducted one-on-one membership interviews with 20 EERC members to identify their shared needs and aspirations for the Collaborative. We transcribed and analyzed interview responses, presented our findings to the EERC at its June meeting, and summarized our findings in a two-page executive summary. We recommended the EERC should establish the following: 1) an organizational framework and leadership structure built on trust; 2) detailed rules that allow members to share resources and ideas with a clear understanding of how others might use them; and 3) a clear pathway for partnering with BIPOC/frontline communities. After discussing the action plan and timeline with our client and advisor, we ultimately decided to amend our scope of work to include: 1) an Energy Equity & Justice (EEJ) Network Database prototype instead of a network map; 2) a governance proposal to respond to the EERC's need to further clarify its mission and governance structures.

Governance Proposal

Since its inception, the EERC has identified a primary goal of developing its governance structure by the end of this year. In one-on-one interviews with our team, members expressed a need for the EERC to establish a governance system, which is necessary for members to be able to fully assess their level of commitment and to take ownership of projects and initiatives. Based on membership interviews, research on existing organizations, and previous EERC brainstorm sessions, we developed a proposal that draws out seven key recommendations for informing its governance structure. These recommendations revolve around the key themes of: 1) recruiting and retaining members, 2) developing a process for joining and exiting the EERC, 3) defining membership roles and working groups, 4) centering BIPOC and frontline involvement, 5) identifying meeting frequency, 6) establishing information-sharing protocols, and 7) establishing non-extractive decision-making processes. The proposal document also contains recommendations for Collaborative funding and capacity-building.

Centering BIPOC and frontline community voices is a priority among EERC members. Meaningful engagement and involvement of those voices requires a mission and a non-extractive research ethic that clearly signals shared values of equity and justice among members. As the EERC solidifies its governance structures, it is equally important for the Collaborative to recognize that many members have expressed that BIPOC and frontline organizations should play a central role in refining and consolidating these governance structures.

Network Database Prototype

Participants in the EERC expressed interest in the creation of a network map or database. Our team consulted with several EERC participants and conducted a short survey to provide the Collaborative with clear guidance on how to begin such a project. Our final one-page summary of findings provides clarity on the purpose of the network database and specific recommendations on how to implement a database in the coming months. It provides guidance on key questions and concerns around whom to include, how to initiate data collection, whether the database should be public or private, how to manage the database in the future, and more. It also offers a list of suggested fields to include in the database, as well as a preliminary spreadsheet of organizations that can be used as a launching point for the project.

Through the survey results and discussions with EERC members, our team identified several key benefits of the network database, including illustrating the organizations, projects, and work areas represented or yet to be represented within the EERC; coordinating efforts within the EEJ space at large; and enabling frontline organizations to identify and connect with local/regional EERC partners. Our recommendations include: 1) Starting with an internal/private list, which will eventually contain public-facing elements; 2) Developing a data sharing and usage protocol for both private and public information; 3) Featuring EERC-affiliated organizations initially and then expanding outward; 4) Using an intake form to capture organizational information for the database; and 5) Enabling organizations to designate which data fields are included or not in the database, and which are public versus private.

Project impacts

Our governance proposal and network database will play a key role in helping further establish and solidify the EERC, which itself is working to positively impact 1) the environment through decarbonization and clean energy transitions, and 2) the communities most impacted by the fossil fuel economy (i.e. BIPOC and frontline communities), through just transitions.

This project focuses on energy equity, i.e. the inequitable distribution of costs and benefits in energy efficiency and renewable energy investments in the U.S. Energy equity work supports the establishment of fair and justice-oriented energy investments in frontline communities. Justice40, the signature environmental justice initiative of the Biden Administration, requires that at least 40% of the benefits of clean energy investments go to "disadvantaged communities." State public utility commissions (PUCs) are also proposing new requirements to define and meet equity targets that will influence hundreds of billions in investments and determine the extent to which historically impacted BIPOC and frontline environmental justice communities can participate in the clean energy transition. Thus, there is an urgent need for energy equity metrics, but only a small number of academic, government, and non-profit researchers and practitioners are creating and disseminating these metrics. To respond to this growing need and limited organizational capacity, the Energy Equity Project (EEP) and the American Council for Energy-Efficient Economy (ACEEE) came together "to identify priorities for a potential future energy equity metrics collaborative" and thus formed the Energy Equity Researchers Collaborative (EERC).

Our team of 6 graduate students, who partnered with the EERC as our project client, represents a range of disciplines: public policy, urban and regional planning, environmental justice, environmental policy, architecture, and epidemiology. Our goal was to support the Collaborative's development of internal processes and infrastructure so that it could form a cohesive coalition that can facilitate easier public access to energy equity metrics and data. Our faculty advisor was Justin Schott from the U-M Energy Equity Project and our client liaison was Jacquie Moss, a member of the EERC and an energy transition scholar at the University of Texas L.B.J. School of Public Affairs.

To help establish the EERC, we worked on the following projects 1) one-on-one EERC member interviews to identify their shared needs, visions, and aspirations for the Collaborative; 2) a summer presentation of findings to the EERC and a two-page executive summary of those findings; 3) the co-development of a governance proposal for the EERC; 4) the co-development of an Energy Equity & Justice (EEJ) Network Database prototype. These deliverables were the product of continued engagement with our project client and advisor and a few other members of the EERC. Their purpose was to respond to the most pressing needs of the Collaborative. More details about each deliverable can be found throughout the report below.

MEMBERSHIP INTERVIEWS

To support the Collaborative's internal organization and process development, we interviewed EERC members to identify their shared need and aspirations for the network. For this deliverable, we:

- Worked with our advisor and client liaison to design and develop outreach materials and an interview questionnaire;
- Created secure data storage and sharing protocols to ensure respondents' anonymity and privacy;
- Designed interview analysis protocols through a qualitative analysis software called Atlas.ti to ensure consistency in response coding and analysis;
- Contacted 30 EERC members and conducted 20 interviews, each lasting 30-45 minutes;
- Recorded, transcribed, and analyzed these interview responses;
- Presented synthesized findings at the EERC June meeting;
- Included areas of agreement and uncertainty among Collaborative members to facilitate productive discussion; and
- Developed a two-page executive summary that we shared with Collaborative members before the November EERC meeting.

Tools:
- Zoom video calls and the Zoom cloud recording service
- Otter.ai and Zoom transcription services
- Atlas.ti for analysis and coding
- MS office and Google drive for data processing, sharing, and storage

See Appendices II to XVII for a full list of links related to our Membership interview project.

REVISING OUR SCOPE OF WORK

While designing and conducting stakeholder interviews, we realized that the EERC was newly-established and needed more organizational support than we expected in clarifying its mission and outlining its governance structure. We also recognized that the organization was working on a different timeframe than the Dow Sustainability Fellows program and wouldn't be able to provide the consistent and detailed engagement and support for which we had hoped. To adjust our path forward we therefore:

- Held internal team grounding meetings and deliberated our action plan for the rest of the year, which included narrowing our scope of work.
- Created a detailed plan to improve communications between our team and our client.
- Solicited input and feedback from the Graham Institute staff.
- Met with our advisor to share our concerns and to solicit input and feedback.
- Shared our updated action plan with our advisor and client liaison.
- Scheduled a meeting with our advisor, client liaison, and a few EERC members to finalize our revised scope of work.
- Split up our team of 6 into 2 groups of 3 Fellows to work on the remaining 2 deliverables that we identified (more details below).

See Appendix IX for our finalized Revised Scope of Work, including a reference to our original scope.

GOVERNANCE PROPOSAL

To support the Collaborative's governance development, we created an extensive proposal and a list of recommendations on the processes by which to recruit and retain members; to join and exit the EERC; to define membership roles and working groups; to center BIPOC and frontline involvement; to change meeting frequency; to establish information-sharing protocols; to establish decision-making protocols; and to fundraise and build capacity for the EERC. For this deliverable, we:

- Established a rationale for developing a governance proposal based on key findings from membership interviews.
- Coordinated weekly internal team meetings to work on the proposal and divide our research and drafting efforts.
- Coordinated bi-weekly meetings with 3 EERC advisors to solicit ideas and feedback for the proposal.
- Derived ideas, suggestions, and recommendations for governance structures from membership interviews.
- Reviewed EERC brainstorm materials and documents drafted by Collaborative members that contained information on its purpose, values, and suggested roles.
- Conducted research on racial and environmental justice coalitions and organizations, including NY Renews, Race Forward, United Frontline Table, Network for Energy, Water, and Health in Affordable Buildings (NEWHAB), and the Climate Funders Justice Pledge.
- Prepared an executive summary of our proposal.
- Presented the proposal at the November 14th EERC meeting.
- Finalized the proposal based on the feedback received from our advisors and accompanied the main document with supplementary documents, including appendices and additional non-governance-related recommendations.

NETWORK DATABASE PROTOTYPE

To support the Collaborative's goal of creating a public-facing network map, we:

- Asked members (in interviews) about organizations and initiatives active in the energy equity space.
- Outlined a work plan highlighting how we envision implementing this deliverable, including a plan to establish a focus group with select EERC members, in order to identify how they intend to use the tool.
- Sourced metadata about organizations shared by members, including information like the type of organization, focus area, geographic location, etc.
- Researched examples of network maps in various sectors to understand how such tools are designed and implemented.

After internal team deliberation and discussion with our advisors and with serious consideration of our Fellowship's time constraints, we shifted our focus from a network map to a network database. The database is a simpler concept that can be expanded into a map in the future. To help our client design a network database, we:

- Planned a focus group with EERC members to gather input on the direction of the project.
- Pivoted to designing and distributing a short survey to a select group of EERC members, due to a compressed timeline and low response rates for the focus group sign-up.
- Analyzed and synthesized the five anonymous survey responses.
- Used the survey results to create a 10-minute presentation for the EERC at its November meeting, and
- Used the survey results and further input from EERC members to write a one-page summary of our findings and recommendations for moving the project forward. The EERC will be able to use this one-pager after our Fellowship comes to an end.

Results and Recommendations

MEMBERSHIP INTERVIEWS — *Whole team*

Our membership interview findings led us to recommended that the EERC should establish the following: 1) An organizational framework and leadership structure built on trust; 2) Detailed rules that allow members to share resources and thoughts with a clear understanding of how others might use them; and 3) A clear pathway for engaging and partnering with BIPOC / frontline communities.

See our two-page executive summary in Appendix VIII for more details about our membership interview recommendations.

As a part of the interviews, we also collated information about energy equity organizations for the network map and created a detailed action plan for the deliverable. After discussing our action plan and timeline with our client and advisor, we ultimately decided to amend the deliverable to take the form of an Energy Equity & Justice (EEJ) Network Database prototype instead of a network map. As stated above, we realized from the interviews that the EERC was still amorphous and needed more support than we expected in clarifying its mission and outlining its governance structure. Thus, we decided that one of our final deliverables would be co-designing a governance proposal for the EERC.

NETWORK DATABASE PROTOTYPE — *Claire Doyle, Caroline Leland, Moksha Menghaney*

Below are the recommendations we made to the EERC for continuing the network database project:

1. PURPOSE AND AUDIENCE

Purpose: To facilitate more effective collaboration by documenting organizations and projects represented within the EERC, organizations and projects connected to the EERC through collaborative relationships, and any energy equity research initiatives not represented within the EERC. For example, the database could enable frontline organizations to identify and connect with a local/regional EERC partner.

Audience: Begin with EERC members as the primary audience, then expand.
- Start with an internal/private list, with the understanding that it will eventually have some public-facing elements (available for use outside of EERC members).
- Require data sharing and usage protocol for both public and private information. This may include a Memorandum of Understanding (MOU) for private data and guidelines posted with public data.

2. FEATURED ORGANIZATIONS

Who: Start with current EERC organizations, then expand to organizations connected to the EERC through professional collaboration and organizations not yet connected.

How: Create, communicate, and implement a clear process for adding an organization as an affiliated party in the database. The process should be elective for those organizations.
- Define what types of organizations can be categorized as conducting energy equity and justice research.
- Create an intake form, possibly modeled after a draft form found in the appendix, to capture organizational information. Organizations will not be automatically added to the database, they must opt-in.

3. ORGANIZATIONAL DATA

In the intake form, enables the organization to designate which fields are included, and which are public versus private.
- The form should include levels of EERC member affiliation, e.g, employee, partner, previous partner, etc. The term "partner" should be clearly defined and can only be used with consent from that organization.
- If funding permits, hire an intern or work with a student group to conduct one-on-one interviews with new organizations to provide additional context for the database project, understand their preferences, and ensure their involvement in the database is participatory and transparent.

Clear language: For categories describing the focus of an organization's research and services, use widely understood and/or clearly defined language.

Data maintenance: Establish a process for maintaining data accuracy, such as an annual survey to confirm information.

See Appendix X for a full list of links to the EEJ Network Database prototype materials.

EERC GOVERNANCE PROPOSAL — *Cat Diggs, Tara Grebe, Phong Hong*

After numerous meetings with our internal team of Fellows, as well as our 3 project advisors (Will Bryan, Bobuch Ken-Opurum, and Justin Schott) throughout the months of October and November, our project team created a 15-page proposal containing the following key sections: 1) One-page executive summary; 2) Introduction, including a rationale for the proposal based on membership interviews and an overview of the document; 3) A proposed research ethic for the EERC based on the Jemez Principles for Democratic Organizing and the 17 Principles of Environmental Justice, as well as an overview of the EERC's background and agreed-upon purpose and values; and 4) EERC governance and funding/capacity-building recommendations.

Furthermore, through our engagement with our project advisors, we decided that the best use of our remaining Dow project funding would be to allocate it toward honoraria for recruiting BIPOC and frontline organizations to join the next EERC meeting. More specifically, our remaining $2,000 will constitute 8 $250 participation stipends, which the EERC members will use to recruit organizations. The Graham Institute has agreed to providing the EERC with 6 months following the end of our Fellowship to recruit and allocate these funds. Our team feels that providing this funding to the EERC aligns strongly with the scope of our year-long collaboration with them, especially as it enables the EERC to diversify its membership and center BIPOC and frontline voices in its work.

EERC GOVERNANCE PROPOSAL (Cont'd)

Our recommendations to the EERC, which were inspired by our membership interviews, external research, consultations with advisors, and previously drafted EERC brainstorm documents (see Methods section for more detail) include the following:

1. **Membership recruitment, requirements, and commitments:** open recruitment and screening for fit through the creation of a membership recruitment questionnaire and form.
2. **Process of joining and exiting the EERC:** setting up protocols for joining (ex. creation of onboarding documents) and exiting the EERC (ex. notifying the Collaborative when leaving, finding a replacement if relevant, and ideally providing a reason for leaving), in order to foster a culture of consent, accountability, and mutual respect among Collaborative members.
3. **Working groups and membership participation structures:** forming working groups based on the immediate needs of the Collaborative (e.g. refining mission and vision, recruiting BIPOC and frontline organizations, fundraising, developing information-sharing protocols, etc.) and developing different tiers of involvement through varying member roles (EERC coordinator(s) and facilitator(s), leadership committee members, community advisors).
4. **Centering BIPOC and frontline involvement:** defining goals of representation (e.g. set number of leadership roles by frontline organizations); creating a list of possible BIPOC and frontline organizations to invite; considering how the EERC will provide a platform for these groups to meaningfully shape the mission and work of the EERC, and tapping into existing lists of anti-racism and anti white supremacy resources to inspire the EERC to build its own list for distribution among EERC members.
5. **Meeting frequency and structure:** meeting more often and for shorter periods of time, forming working groups, coordinating an in-person membership retreat to help build trust and relationships among members.
6. **Establishing information-sharing protocols** by leveraging the expertise that already exists within the EERC to ensure that information and knowledge that is shared within the EERC is protected. This will be key for building trust with BIPOC and frontline organizations.
7. **Formalizing decision-making and operating agreements**, such as decision-making processes (consensus or voting?); agreements and norms around conflict resolution, restorative justice, non-violent and direct communication, and confidentiality & transparency; organizational autonomy; non-partisanship; equitable budgeting policies; equitable representation goals (especially when it comes to leadership roles in the Collaborative).
8. **Funding:** determining what kinds of foundations and donors could support the EERC, what the funding would be used for (e.g. participation stipends or researching funding), and which EERC member organization(s) could act as the fiduciary(ies) for the funding.
9. **Capacity-building:** hiring a facilitator or facilitator group to help the stretched-thin EERC members further establish their governance structures and programmatic actions and develop strategies to get further student interns and research teams involved in supporting the EERC.

See Appendix XI for a link to our full proposal and its related materials (EERC presentation, appendices and additional non-governance related recommendations).

Anticipated Impacts

EERC-SPECIFIC IMPACTS OF OUR WORK

Our project deliverables, notably our governance proposal and network database, have and will continue to have immediate and long-term positive impacts on the EERC. **In the short-term,** through our governance proposal recommendations, the EERC is in the process of considering which of its member organizations—such as the Texas Energy Poverty Research Institute (TEPRI), the Southeast Energy Efficiency Alliance (SEEA), and Elevate—might be able to serve as the host for some of the EERC's future funding streams, which Collaborative members will collectively work to raise. The following immediate and concrete next steps were identified after our final November 14, 2022 client presentation: 1) identifying a host for EERC funding; 2) developing a proposal to hire a facilitator for the EERC; 3) developing an onboarding document and creating a list of BIPOC and frontline organizations to recruit for the next EERC meeting; 4) prioritizing deciding whether the EERC should meet more frequently and/or should plan an in-person retreat. At the November 14 presentation of the EEJ network database, key questions emerged: 1) How can the network database support expanding BIPOC participation and representation?; 2) Should organizations be invited to opt-into the database?; 3) How can the definition of energy equity research be broadened to make the database more inclusive?; and 4) How can the EERC leave room for new invited members to help shape the network database?

Long-term, our governance proposal and network database will play a key role in helping further establish and solidify the EERC. Our governance recommendations are transferable to the work of other young justice coalitions, and there is a clear opportunity for the Collaborative to scale the network database process recommendations to a semi-public product that will benefit board networks of stakeholders.

BROADER IMPACTS OF OUR WORK

Environmental/Social Justice Implications: By supporting the creation of a cohesive energy justice advocacy group (EERC), we aimed to participate in the broader movement to reframe the energy transition and include equity and justice as its foundational tenet. The Collaborative will also work to operationalize equity in energy generation, distribution, transmission, and efficiency to help alleviate some of the distributional and procedural disparities inherent in our energy systems.

Positive Impact on Communities: The EERC's efforts center communities with disproportionately high energy cost burdens and disproportionate exposure to environmental toxins and pollution. It will also include BIPOC and frontline communities engaged in energy policy design and implementation.

Community Benefits: Our project has created a framework for identifying organizations tracking federal, state, and local initiatives utilizing the resources made available through the Justice40 initiative. Although this identification process is intended for the Collaborative, it will likely flow to frontline organizations through member engagement, technical support, and research projects. We hope that our work supporting the establishment of the EERC will lead to creating a "one-stop-shop" where researchers, policymakers, organizations, communities, and businesses can collaborate and exchange resources for advancing energy equity and justice research efforts across the US and beyond.

Reduced Carbon Emissions: By focusing on incorporating equity and justice in the transition from fossil fuels to cleaner sources of energy, and by doubling down on energy efficiency initiatives, our project will help reduce carbon emissions in energy generation, transmission, and distribution.

Photo Credit: Canva

Acknowledgements

See Appendix I for the names, titles and organizations of faculty advisor, client liaison, and client advisors.

Appendices

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U-M Faculty Advisor:
Justin Schott (he/him)
Project Manager, Energy Equity Project
Urban Energy Justice Lab
University of Michigan School for Environment & Sustainability

Client Liaison:
Jacquie Moss (she/her)
Ph.D. student, University of Texas LBJ School of Public Affairs | Energy transition scholar

Client Advisors:
Will Bryan (he/him) | Director of Research | Southeast Energy Efficiency Alliance
Amanda Dewey, PhD (she/her) | Local Policy Manager | American Council for an Energy-Efficient Economy
Bobuchi Ken-Opurum, PhD (she/her) | Director of Research Programs | Texas Energy Poverty Research Institute

Appendix II: Revised Timeline from September 12 to December 3, 2022

September 2022
- Fall update presentation for Dow Fellowship cohort (9/12)
- Fellows meet with Justin and Jacquie, as well as new EERC advisors (Will, Amanda and Bobuchi) to finalize their revised scope of work.
- Network Database team (Claire, Moksha, Caroline) works on their prototype and focus group efforts in consultation with Jacquie, Amanda, and Bobuchi
- Governance Proposal team (Cat, Phong, Tara) work on their proposal in consultation with Justin, Bobuchi, and Will

October 2022
- *Midterm exams*
- Continue working on proposal and network database through internal team meetings
- Symposium Prep seminar (10/24)

November 2022
- Finalize proposal and network recommendations
- Confirm final budget allocation to the EERC (honorariums for recruitment of BIPOC and frontline organizations)
- Present findings to the EERC on November 14
- Final report and presentation preparation
- Due date: 11/28
- Send all final materials to the EERC

December 2022
- Symposium Event (12/3)
- Dow Fellowship wrap up

Appendix III: Member Outreach Materials

This year, a team of six Dow Sustainability Fellows with the UM Graham Sustainability Institute will be supporting the Energy Equity Researchers Collaborative on their ongoing efforts. Our team represents a range of disciplines: public policy, urban planning, environmental justice, environmental policy, architecture, and epidemiology. We come to this project with different levels of experience in energy justice but are all eager to gain a deeper understanding of how energy equity is being envisioned and implemented in the U.S through initiatives like Justice40.

OUR TEAM

Moksha Menghaney *(she/her/hers)*
Team Co-Lead, Graham Sustainability Institute Dow Fellowship
M.S. Environmental Policy Candidate, *School of Environment & Sustainability*
Master of Public Policy Candidate, *Gerald R. Ford School of Public Policy*
M.S. Financial Engineering, Columbia University; Bachelors of Engineering, BIT Mesra, India

Moksha Menghaney is a dual-enrolled student at the University of Michigan making a career pivot from quantitative finance to energy and climate policy. She hopes to combine her current learnings with her analytical background to help local and state governments lead climate action and build programs that foster resilient and just communities. Currently, she serves as the Team Co-Lead for the Energy Equity Researchers Collaborative Dow Project. She helps the team facilitate internal process management and communication with the Dow Program. She is also working as a research assistant with Dr. Sarah Mills studying the impact of rural zoning regimes and public engagement processes on utility - scale solar development. Before joining UofM, she worked with the University of Chicago's Healthy Regions and Policy Lab, identifying the impact of the city's diesel bus pollution on neighborhood asthma and COPD rates. Moksha also worked with the Lab's US Covid Atlas as a Community Mapping Analyst, sourcing stories from members of underrepresented communities to share their experience with Covid on the lab's blog. Outside work, she loves cooking, playing board games, and taking long walks.

Cat Diggs *(she/her/hers)*
Team Co-Lead, Graham Sustainability Institute Dow Fellowship
M.S. Environmental Justice Candidate, *School for Environment and Sustainability*
Master of Urban and Regional Planning Candidate, *Taubman College of Art and Architecture*
Bachelor of Arts in English Literature, Philosophy and Anthropology, McGill University

Cat was born and raised in Montreal, Canada by human rights advocates in a bilingual and bi-cultured home. She obtained a Liberal Arts Degree from McGill University in 2014 and has worked in various fields ever since, from restaurants and retail, to cultural event-planning, street fundraising for NGOs, freelance writing, ESL teaching, and nonprofits. With a passion for Afrocentric music history and cultures of grassroots activism, she moved to Detroit as a dual citizen in 2016. Through her 5 years in Detroit, she worked in grassroots sustainability as a community-based recycling educator at the city's only public recycling drop-off center, and later as a Manager of Programs & Outreach at Detroiters Working for Environmental Justice (DWEJ), where she co-led the creation of a green energy and sustainability program for Detroit, managed a Detroit-based EJ Coalition, helped rebuild the

organization's website, co-created a sustainability Voter Guide for the 2021 municipal elections, and co-created a documentary series on Detroit solar success stories. Through her dual degree in EJ and planning, her goal is to pursue research in the field of Waste Justice, equitable circular economies, and just transitions for workers in the waste trade. Having been personally exposed to the world of energy equity and justice in Detroit, she looks forward to helping build capacity around the crucial efforts being put forth by the Energy Equity Researchers Collaborative.

Phong Hong *(he/him/his)*
Client Relations Lead, Graham Sustainability Institute Dow Fellowship
M.S Computational Epidemiology & Systems Modeling Candidate, *School of Public Health*
Master of Public Policy Candidate, *Gerald R. Ford School of Public Policy*
Bachelor of Science in Entomology, UC Riverside

Phong comes from an interdisciplinary background in community advocacy, public health research, and disease surveillance. During the COVID-19 pandemic, Phong has worked as a Senior Communicable Disease Investigator for the local health department and a Public Health Advisor at the CDC. In the past, he has engaged in community projects that mobilized resources for refugees post-resettlement in California and provided education to migrant children in Germany as a Fulbright Scholar. Phong plans to work in policy-oriented mathematical modeling, leveraging the wealth of existing information and data on global disease outbreaks to shape a healthier, more sustainable future. Currently, he serves as a Dow Sustainability Fellow - Client Relations Lead for the Texas Energy Poverty Research Institute, in which he manages communications between partner and As a first-generation Vietnamese immigrant, Phong is very interested in learning more about the energy equity gap, particularly the transition to renewable energy in communities of color.

Claire Doyle *(she/her/hers)*
Research Co-Lead and Tech Lead, Graham Sustainability Institute Dow Fellowship
M.S. Environmental Justice Candidate, *School of Environment and Sustainability*
B.S. in Foreign Service (Culture & Politics major) from Georgetown University

Claire is pursuing an M.S. in Environmental Justice at the University of Michigan and is a part-time Program Assistant at the Wilson Center's Environmental Change and Security Program. She is passionate about research and practice at the intersection of sustainability, human rights, and peace and is especially interested in how policies in renewable energy, conservation, and climate migration can better center equity. Claire has held positions with several non-profits including Communities United Against Hate and the American Indian Higher Education Consortium, where she oversaw capacity development projects on climate resilience and food sovereignty. Directly prior to grad school, she worked for the Environmental Peacebuilding Association to conduct research on conflict-sensitive environmental projects and develop an inclusive, global dialogue on environment, peace, and conflict. She serves as the tech lead and research co-lead for the Dow Sustainability Fellowship project with the Energy Equity Collaborative.

▌Caroline Leland *(she/her/hers)*
Budget Lead and Research Co-Lead, Graham Sustainability Institute Dow Fellowship
M.S Environmental Science Candidate, *School of Environment and Sustainability*
Master of Public Policy Candidate, *Gerald R. Ford School of Public Policy*
Bachelor of Arts in Journalism and Mass Communication

Fascinated by questions of sustainable and equitable land use policy, Caroline is pursuing a dual Master of Public Policy and BS in sustainability and environment. Her current role as a Graduate Student Instructor for an undergraduate class on energy technology, markets, and policy has sparked a newer interest in energy equity issues—leading her to an upcoming summer internship researching urban heat islands for the EPA. Prior to UM, Caroline spent three years as a communication specialist for public service and leadership programs at UNC-Chapel Hill. Previously a freelance journalist, she has been a contributor for a number of national and local/regional publications including NPR, Southern Foodways Alliance, LinkedIn ProFinder, and Blue Ridge Outdoors. She also possesses strong project management skills, having founded and directed a 501(c)(3) nonprofit in her hometown of Tarboro, NC. A proud graduate of UNC-Chapel Hill's School of Journalism and Media, Caroline also balances an allegiance to Duke University as an alumna of the Robertson Scholars Leadership Program. Her role on the Dow team is focused on managing the team finances and co-leading research projects in partnership with Claire Doyle. Caroline is excited to be gaining teamwork experience, knowledge of energy equity issues, and client service skills through the Dow Fellowship.

▌Tara Grebe *(she/her/hers)*
Communications Lead, Graham Sustainability Institute Dow Fellowship
Master of Urban and Regional Planning Candidate, *Taubman College of Art and Architecture*
Master of Architecture Candidate, *Taubman College of Art and Architecture*
Bachelor of Science in Design, University of Nebraska–Lincoln

Tara's studies at the University of Michigan focus on the intersection of sustainable design, affordable housing and participatory planning. She chose this project because she is interested in how we can promote equitable development in communities affected by energy pollution and how we can address the burden of energy costs for low-income households. Her work with non-profits and local Indigenous tribes through through her university's sustainability organization (Sustain UNL) sparked her passion for collaborative community planning. In the professional realm, she was an architecture intern for an engineering consulting firm where she worked on restricted government projects and promotional materials. She is currently a graduate research assistant for the Poverty Solutions Initiative where she works on various projects from zoning maps to restorative justice research. Her multidisciplinary background has provided her with skills in creative problem solving, mixed-methods research, policy analysis, as well as verbal and written communication. Through our partnership with the EERC, Tara is hoping to learn more about the intersection of energy equity and the built environment.

EERC MEMBER INTERVIEW OUTREACH STATUS	
Complete (interview + transcript)	
Scheduled (+ interview transcript pending)	
Pending response from interviewee	
Refused or no longer part of EERC	

Intervie wers	Name of Org, Business or Academic Partner (with hyperlink to org website)	Type of organization	First name	Last name	Email	Date of first email	Type of follow up	Date of follow up	Number of follow ups	Status of interview (pending, scheduled, complete)	Date + hour of interview (if applicable)	Consent Agreement (Direct Quote, Pharaphrase or Anonymous)	Google Survey + Doc or Google Survey only	Zoom Recording Link	Transcribed has been re and entered the google survey
	U.S. Department of Energy	Government				4/25/2022		n/a		Complete	10am May 6	Paraphrase	Google survey only	https://umich.zoo m.us/rec/share/a5 WNF1I6BCMcVT5	In progress
	U.S. Energy Information Administration	Government				4/25/2022	Email	5/2/2022	1	Complete	2:30pm 5/18/2022	Anonymous quote		https://umich.zoo m.us/rec/share/1L	Completed
	U.S. Environmental Protection Agency (EJScreen Tool)	Government				4/25/2022	Email			Turned Down					
	U.S. Environmental Protection Agency (ESIST Equity Analysis)	Government				4/25/2022		n/a		Complete	2:30pm May 9	Direct quote	Google survey only	https://umich.zoo m.us/rec/share/6L	Completed
	Initiative for Energy Justice (IEJ)	NGO				4/25/2022	Email	5/4/2022	1	Complete	5/27 at 12pm EST	Direct quote	google survey + doc	https://umich.zoo m.us/rec/share/nM CUBPSBHY1m2T Xn5PmtpcjMFrN8 EyYzN6oemN0zX zfSHCQsDitWS-5	Completed
	Initiative for Energy Justice (IEJ)	NGO				5/19/2022	Email	5/27/2022	1	Turned Down					

Appendix V: Member Interview Questionnaire/Script

EERC Member Interview Questionnaire

[EERC Google Drive](#)
[EERC Background Info Doc](#)

Fit & Role
1. To what extent have you been involved in the Collaborative so far? (what meetings joined, full or partial participation, work between meetings vs just participating)
2. What specifically are you hoping to gain from participating in the Collaborative?
3. What skills and/or resources could your organization contribute to the Collaborative?
4. How would you finish this sentence: One year from now, the Collaborative will have been successful if…
5. What about five or ten years from now? What would make the Collaborative successful in that timeframe?
6. What resources (website, social media, document sharing tools, etc.) could the Collaborative provide that would be most helpful for your organization and its target audience? And in what format?

Trust-building
7. How do you think the collaborative could best partner with and serve the interests of BIPOC/frontline communities?
8. Are you aware of other energy-equity collaborations within or outside of your organization?
9. Do you see any barriers that are hindering successful collaboration within the Collaborative or do you have concerns about any of the other Collaborative members?
10. Are there specific ways that trust building needs to happen before Collaborative members can work on projects together?
11. Do you have ideas about requirements or guidelines for being a member of the Collaborative? How should new members be considered and added?

Org Name: xxxx
Interviewee: xxxx
Position: xxxx
Date and time:
Format: Zoom, (number of minutes), recorded
Interviewer: xxx
Consent to Record: Yes/No
Consent to Quote: Yes/No/Other:Paraphrase
Short Summary (key take-aways from the interview): xxxxx

Write responses in blue
<mark>Highlight quotes in yellow</mark>

Introduction Script to the Zoom Interview

Thank you again for agreeing to talk with me today. As I mentioned in the email, I'm part of the Dow Sustainability Fellowship Program at the University of Michigan, and I will be working with Justin Schott from U-M and Jacquie Moss from TEPRI over the next 8 months to support the work of the EERC. My teammates and I are in the process of conducting interviews with representatives of the Collaborative, like yourself, to better understand how the EERC can support its member organizations.

Before we start, I want to make sure that you know that your participation in this interview is voluntary, so you can always skip over a question or end the interview at any time. In terms of confidentiality: please let me know what level of anonymity you prefer. If you're ok with it, I plan to share notes from this call with my Dow Fellows teammates and with Justin and Jacquie. If at any point you would like to share something that you prefer remains confidential to my teammates, to Justin, and/or to Jacquie, please let me know.

Do you mind if I record our conversation? This is to ensure that I accurately capture what you say, without having to rely too heavily on my own notes.

Would you like an opportunity to review our notes and your responses? Can we include quotes (attributed or anonymous) in a summary presentation at the next meeting?

Great, let's get started.....

Interview questions:

FIT & ROLE

1. **To what extent have you been involved in the Collaborative so far? (what meetings joined, full or partial participation, work between meetings vs just participating)**

xxxxx

2. **What specifically are you hoping to gain from participating in the Collaborative?**

xxxxx

3. **What skills and/or resources could your organization contribute to the Collaborative?** *(Interviewer: Be prepared to explain what initiatives the Collaborative is currently working on)*

xxxxx

4. **How would you finish this sentence: One year from now, the Collaborative will have been successful if…**

xxxxx

5. **What about five or ten years from now? What would make the Collaborative successful in that timeframe?**

xxxxx

6. **What resources (website, social media, document sharing tools, etc.) could the Collaborative provide that would be most helpful for your organization and its target audience? And in what format?**

xxxxx

TRUST-BUILDING

7. **How do you think the collaborative could best partner with and serve the interests of BIPOC/frontline communities?**

xxxxx

Screenshots

Document Manager

13 Documents | ≡ Filter | Sort by: Name ⇅ | ◯◯ Document Groups | + Add document

☐ 🗎 1. To what extent have you been involved in the Collaborative so far? (what mee... ◯◯ 0   🏷 11   💬 46   ←|

☐ 🗎 2. What specifically are you hoping to achieve by participating in the Collabora... ◯◯ 0   🏷 10   💬 42   ←|

☐ 🗎 3. What skills and/or resources could you or your organization contribute to th... ◯◯ 0   🏷 13   💬 40   ←|

☐ 🗎 4. How would you finish this sentence: One year from now, the Collaborative wi... ◯◯ 0   🏷 6   💬 30   ←|

Quotation Manager

24 of 409 Quotations | ≡ Filter | Sort by: Name ⇅ | ◷ Chart   Save as report   ⬇ Download

Bar chart values (left to right): 32 recommendations, 25 setting-expectations, 24 impactful-results, 24 (gray), 23 collaboration-facilitation, 21 defined-membership-roles, 20 questions, 19 meeting-structure, 18 developed-collaboration, 16 foundational-knowledge/expertise, 14 facilitate-communication/connection, 13 center-bipoc-experience, 13 resources, 12 clear-mission

☐ 🗎 5. WHAT ABOUT FIVE OR TEN YEARS FROM NOW? WHAT WOULD MAKE THE COLLABORATIVE SUCCESSFUL IN THAT TIMEFRAME?   ←|

All public infrastructure decisions are made using the best available, constantly improving guidance about multi-criteria solutions.

`impactful-results CD 24`

Interview Data Storage

Recording - Step by Step How To

[Video walkthrough link](link)

Main folder for all interview protocol and storage mechanism: ["1. Interview Protocol + Storage"](link)

1. For each interview, turn on cloud recording and auto transcription mode.
   a. Read each question out loud
   b. Once the recording stops, you will receive a link via email an hour or so later. Copy and paste the audio link into the ⊞ 5. EERC Member Interview Tracking Sheet
   c. To ensure that the audio recordings don't get lost on the long run (because Zoom deletes recordings every once in awhile), download the m4a recordings to your computer and upload it to the [Interview Recordings](link) subfolder)
   d. Label your recordings with the interview number in the tracking sheet
2. During the interview, you have the option to choose one of two options for data entry:
   a. **Option 1 (Google Survey)**
      i. Open the [EERC Membership Interview Form](link) at the beginning of each interview
      ii. Document consents to record and quote
      iii. Take notes of the interview at the end of the form
      iv. Submit the incomplete form
      v. Once the transcription is available:
         1. Return to the form to paste your transcribed text, removing filler words and unnecessary repetition. As long as you have not created a new form, you can edit the original form.
         2. If a new form has been created for another interview, you can paste the transcription directly into the
            ⊞ EERC Membership Interview Form (Responses)
         3. Bold the interesting quotes of your interview for future analysis purposes
   b. **Option 2 (Google Doc & Survey)**
      i. Create a copy of the master [interview form (google doc)](link)

ii. Title the document by the assigned interview number, name of organization and name of interviewee

iii. Take notes of the interview in the google doc

iv. Once the transcription is available:
1. After removing removing filter words and unnecessary repetition, add transcribed text into google doc OR use Zoom transcriptions to manually transcribe (whatever we end up finding out is more efficient time-wise i.e. if the transcription winds up not being as efficient as we want it to be)
2. Highlight "juicy" quotes from the interview in yellow throughout the interview for future analysis purposes
3. Write a brief summary of key takeaways from the interview at the beginning of the interview form

v. Store your labeled Google Docs in the Interview Notes subfolder

vi. Transfer the text to EERC Membership Interview Form so it will populate the Excel Spreadsheet, and bold the interesting quotes of your interview for future analysis purposes

Next Steps for Coding the Interview
- After May 9 meeting, a small team of Dow Fellows will come together to create a draft coding spreadsheet with key themes that are emerging from interviews and that come out of the interview questionnaire
- We can also create a Google Doc to copy paste interesting quotes from the interview based on themes so they can all be streamlined into one place
- Someone in the team will also look into the analysis software provide by Jacquie to see if it would be useful for us → add link?
- At next bi-weekly full team meeting, we will go over the spreadsheet together and try to finalize a draft before vetting it by J + J
- We will then decide if we prefer to do "manual" coding or use the analysis software to do it for us if possible

Appendix VII: June Presentation to EERC

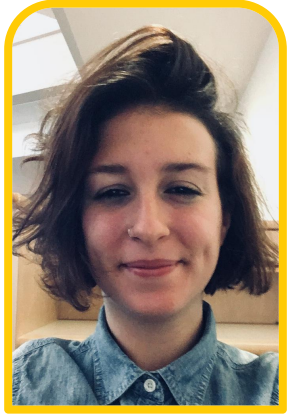# Spring 2022 EERC Interview Findings

June 22, 2022

DOW SUSTAINABILITY FELLOWS
UNIVERSITY OF MICHIGAN

Outline

1. Introduction of ourselves and project
2. Findings Part I: Describing the EERC
3. Findings Part II: Requisites for success
4. Conclusion
5. Brief Q&A
6. Group discussion

Our Fellowship Team

Cat Diggs

Environ. Justice &
Urban Planning

Moksha Menghaney

Environ. Planning
& Public Policy

Claire Doyle
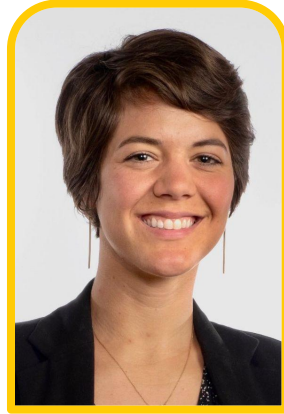
Environ. Justice

Tara Grebe

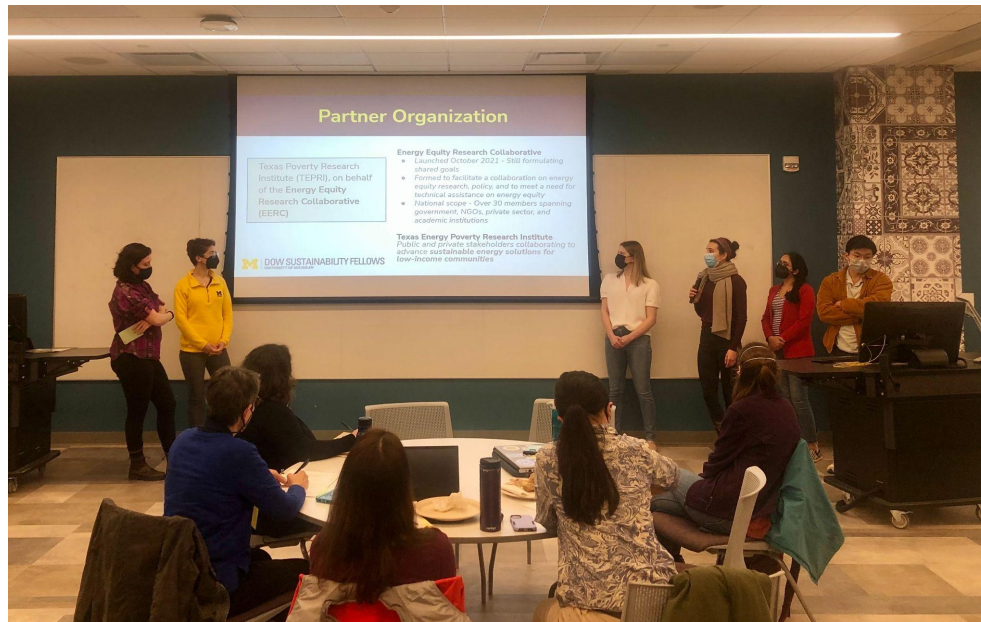Urban Planning &
Architecture

Phong Hồng

Public Policy & Comp.
Epidemiology

Caroline Leland

Environ. Justice
& Public Policy

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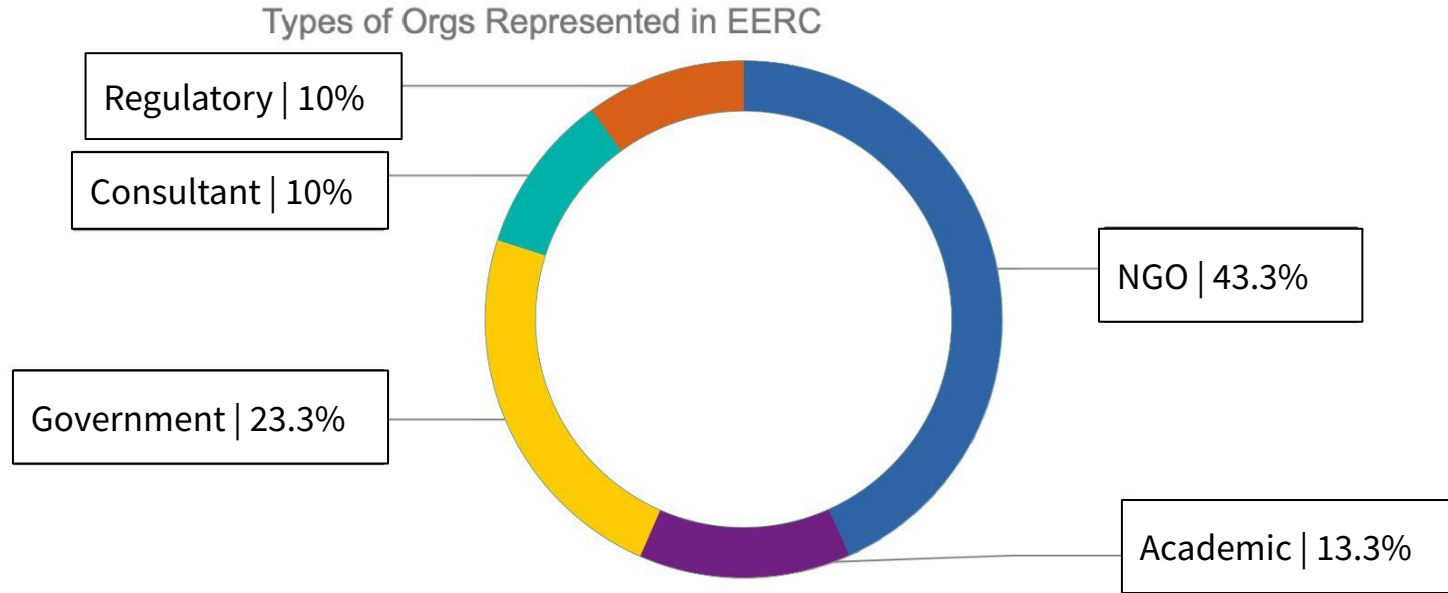
Our Partnership with the EERC

Summary of Findings

1. EERC needs more **clarity on its mission** and shared **values**.

2. Internal and external **trust building** will enable more meaningful collaboration.

3. The Collaborative's **governance structure** can inform member roles and recruitment.

Part I: Introduction

Who is in the EERC?

Types of Orgs Represented in EERC

Regulatory | 10%

Consultant | 10%

NGO | 43.3%

Government | 23.3%

Academic | 13.3%

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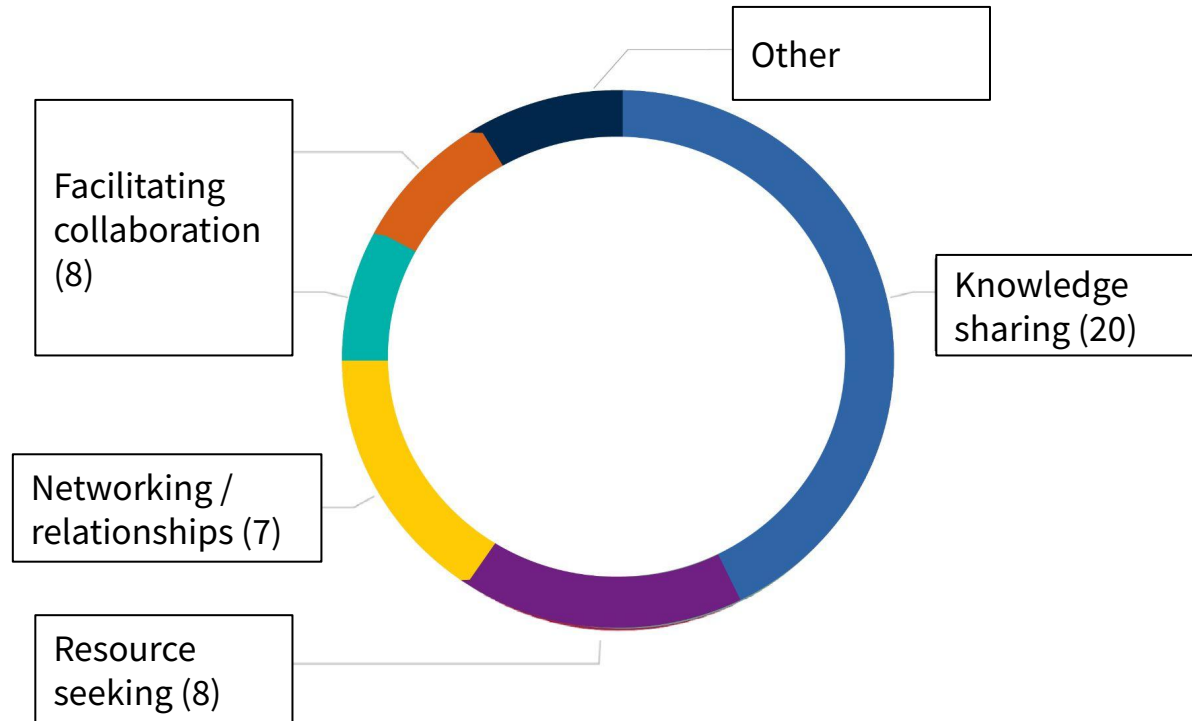
Why did EERC members join?

- Safe space to **share knowledge**
- **Network** with like-minded people
- **Collaborate** on projects

Other

Facilitating collaboration (8)

Knowledge sharing (20)

Networking / relationships (7)

Resource seeking (8)

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Why Members Joined

1. Wanting a safe space to share <u>knowledge and resources</u>:

   EERC is unique in that some members have invested much of their career into energy equity, whereas others have worked in parallel fields and are looking for ways to dive deeper into this space.

Why Members Joined

2. <u>Networking</u> and meeting people with similar interests:

"I'm really interested in political power and mobilization around energy justice. I'm looking to join a group that is like-minded in that regard, and can be strategically instrumental in inserting some of the issues that I think we are all interested in."

Why Members Joined

3. <u>Collaboration</u>:

"I'm really interested in just connecting with people and seeing what other people are doing in this space, especially, doing work with energy equity. I want to make sure that we're not duplicating any efforts and also just seeing where we can collaborate with other people on energy justice."
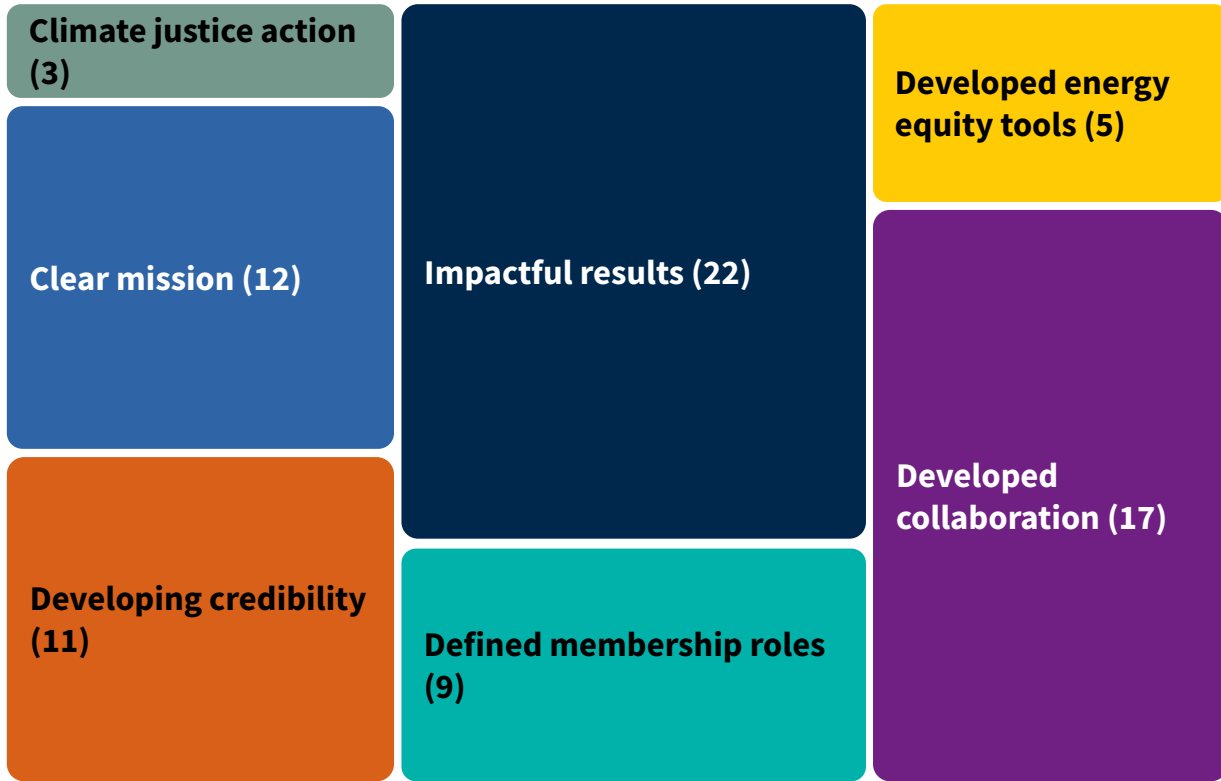
Envisioning Success

Short Term

Define/refine the EERC: clarify **mission**, define **membership**, & develop **collaboration**

Long Term

Make an impact: publish **tools/metrics**, build professional **credibility**, and take climate justice **action alongside communities**

Climate justice action (3)

Clear mission (12)

Impactful results (22)

Developed energy equity tools (5)

Developed collaboration (17)

Developing credibility (11)

Defined membership roles (9)

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Findings Part II: Requisites for Success

Key Observation 1: Mission Dependency

Membership involvement, **trust building** and **community engagement** are **mission-dependent**, suggesting that the EERC should **revisit its scope of work** and **clarify its shared values**.

Members often responded to interview questions by asking about the Collaborative's mission:

"I think, ultimately, it depends on what we're trying to achieve: what we decide our goal is as a group. How we engage communities will follow that."

A strong purpose is necessary for members to understand their role and investment in the Collaborative.

"Why participate in this?
*Like, **what's its goal,** where are its goals?*
***How is it different** from other kinds of efforts that are similar?*
***I think uncertainty can breed maybe mistrust,** but also maybe just skepticism that this is going to be a useful application of people's time."*

EERC members want BIPOC/frontline communities to directly shape the Collaborative's mission.

"Has a formation like this been asked for by frontline and BIPOC community groups?"

Shared values and clear definitions are an essential part of an organization's mission.

*"Thinking about the **mission** of the organization and when we say **research**, what do we mean by that? And **who is included** in that definition of research? Making sure that it's not just universities and well-funded entities."*

Key Observation 2: Building Trust

…both **within** the collaborative

Internal trust requires **value alignment** and clarity on **member roles**

Transparency is needed regarding **funding** and knowledge-sharing **protocols**

…and **externally in communities**.

Seeking impacted communities' **permission to engage**

Building on **pre-existing relationships** with BIPOC and frontline groups

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Building trust internally

"The collaboration thing, I think, is still more about relationship building. I hate to be asking for more meetings, but I feel like at this point it's just, people need to be talking more to each other."

"Meeting in person and having face-to-face conversations … I think that really helps the [trust-building] process."

Building trust externally

There is a **tension** between a desire for immediate **community engagement** *vs.*
the time required for **authentic relationship-building**.

Which should come first: mission definition or community outreach?

*"To what extent we need that [trust] and **how we build that [trust]** will probably depend on what we're trying to achieve together."*

Key Observation 3: Governance

In order to operate effectively and sustainably, EERC needs to **develop clarity on its governance structure**, including **deciding on leadership role(s)** and defining **membership roles/expectations**.

Membership Roles

*"We need **something concrete** that says, 'Yes, **by being a member** of the collaborative, this is **what we are all signing onto**.'"*

Membership Recruitment

*"We initially said it should involve people that are actively developing or researching **energy equity metrics**.*

*That's a particular **quantitative approach** and **excludes people** that do more qualitative work or reports— even though there's a lot of **value** there.*
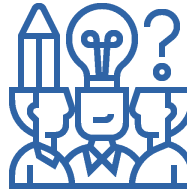
*I think we need a much **broader net** at this point for just energy justice leaders or advocates. And not trying to pin people down as researchers."*

Conclusion

Member Vision of Short-Term Success

Clarify mission and reach consensus on **shared values**

Define **membership roles**, **leadership opportunities**, and **governing structure**.

Strengthen **collaboration** and **interpersonal connections** between members

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Member Vision of Long-Term Success

Develop **professional credibility** and **establish trust** with **external partners**

Publish energy equity **tools and metrics**

Produce **impactful results** that **support frontline communities** across the country

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Final takeaways

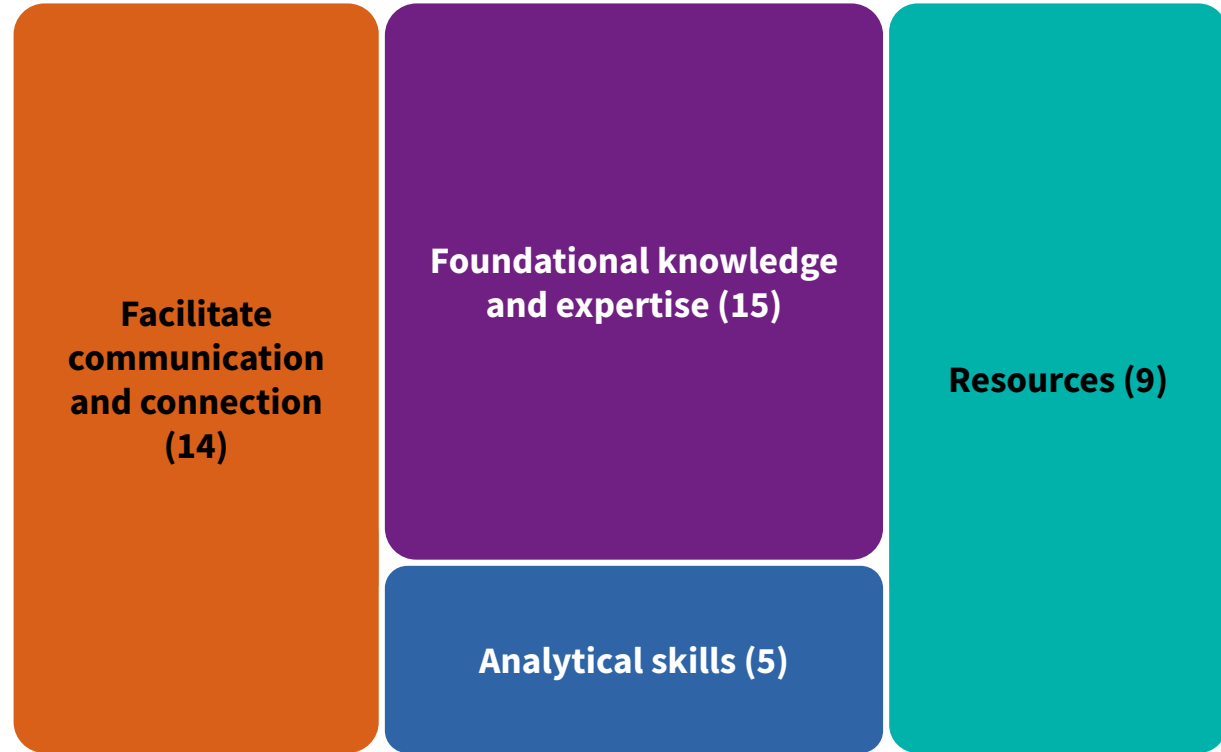Highlighting areas of **consensus** and **uncertainty**

Consensus

- EERC's **mission needs to be defined** as soon as possible.

- **Networking is a key motivator** for joining the Collaborative.

- EERC **needs a governance structure**, with member roles **clearly defined**.

Uncertainty

- To what extent can frontline communities **directly contribute** to shaping the mission? How do EERC members define **equity** and **justice**?

- What is the best way to **build relationships** among Collaborative members, when time is precious?

- What exactly should the **governance structure be**, and **how should it be decided**?

Solutions might be found in what EERC members can contribute to the Collaborative:

Facilitate communication and connection (14)

Foundational knowledge and expertise (15)

Resources (9)

Analytical skills (5)

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Our Next Step: Detailed Report

Thank you for your engagement!

Justin Schott: University of Michigan advisor
Jacquie Moss: EERC liaison
EERC members: nearly 20 total hours of thoughtful input via interviews

Cat Diggs	Moksha Menghaney	Claire Doyle	Tara Grebe	Phong Hồng	Caroline Leland
Outreach emails, interviews, interview mgt, coding	Interviews, analysis protocol, software mgt, coding	Outreach emails, interviews, analysis protocol, coding	Interviews, data synthesis, presentation incl. visual design	Interview design/mgt, interviews, analysis protocol, coding	Interview design, interviews, data synthesis, presentation

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Clarifying Questions?

For discussion:

1. What resonated? Did anything surprise you? What are your key takeaways? Did you disagree with any of the findings?
2. Do you have questions/suggestions that would be helpful in shaping the final report?

Appendix VIII: Executive Summary of Interview Analysis

INTRODUCTION

In January 2022, our team of University of Michigan graduate students began working with the Energy Equity Researchers Collaborative (EERC) to assist in its continued development. Our first task was to conduct one-on-one interviews with EERC members to (1) identify shared goals, desires, and aspirations and (2) elevate diverse viewpoints. Based on our interview findings, we have proposed organizational recommendations—which can be found at the bottom of this document—to help the Collaborative operate more effectively and reliably.

INTERVIEW & ANALYSIS PROCESS

In March 2022, our team began preparing a strategy and materials for this interview project. Starting in May, we contacted 30+ EERC members, of whom we interviewed 20. Some members declined interview invitations because they had plans to leave the Collaborative or another member from their organization had already agreed to be interviewed. During each 30-45 minute interview, we posed 12 standardized questions (see Appendix 3).

We recorded and transcribed each of the interviews and cross-referenced our notes to maintain the integrity of the responses. We then used Atlas.ti, a qualitative analysis software program, to code and analyze the interview responses. We presented our findings to the EERC at its June meeting. EERC members Justin Schott (our U-M academic advisor) and Jacquie Moss (our EERC client liaison) provided guidance throughout the project; however, only Dow Fellows have access to the interview recordings and transcripts.

RECOMMENDATIONS

(1) Membership involvement, trust building, and community engagement are mission-dependent, suggesting that the EERC should refine its mission and clarify its shared values. A stronger shared sense of purpose will motivate more active member engagement.
(2) The EERC should identify and implement internal and external trust-building processes for effective collaboration.
(3) The EERC should establish a governance structure to inform member roles and recruitment processes. Some interviewees provided ideas and recommendations on governance, which will be compiled and presented at a future date.

CONCLUSION

Overall, we believe there is sufficient motivation and enthusiasm among Collaborative members to partner on energy equity research; however, given its nascent stage, the EERC should establish the following:
(1) an organizational framework and leadership structure built on trust;
(2) detailed rules that allow members to share resources and thoughts with a clear understanding of how others might use them; and
(3) a clear pathway for engaging and partnering with BIPOC and frontline communities in ways that are reciprocal and not extractive.

KEY FINDINGS

FIT AND ROLE

What Members Can Offer the EERC

Industry knowledge at the state, local, and regional levels, as well as connections to similar organizations.

Develop organizational management, opportunities for collaboration, and technical resources.

Member Motivation for Joining[1]

Members want a safe space for knowledge sharing and networking with like-minded individuals.

Members seek collaboration[2] and shared resources in areas of policy, engagement, metrics, justice, etc.

GOVERNANCE AND LOGISTICS

Developing Clarity on Governance[3]

Decide on flat vs. hierarchical organizational structure; establish membership roles and expectations.

Clarify process for membership recruitment and onboarding; provide resources for new members.

Improving Collaboration

Provide collaborative opportunities like breakout groups in meetings and working groups outside of meetings.

Consider opportunities for internal relationship building like an in-person conference or retreat.

TRUST BUILDING

Building Trust Internally[4]

Members need to agree on the definitions of research and energy equity to find value alignment.

Providing clarity[5] on member roles and creating opportunities for internal engagement will build trust.

Establish knowledge-sharing protocols[6] and prioritize transparency with funding and decision-making.

Building Trust Externally[7]

Seek permission from BIPOC /frontline communities before engaging with them in research.

Expand pre-existing relationships with BIPOC / frontline groups before developing new relationships.

Allow BIPOC / frontline groups to inform EERC's priorities as the Collaborative evolves.

LONG & SHORT TERM GOALS

Member Vision for the Short-Term

Develop credibility by networking with similar organizations and recruit new members (especially BIPOC).

Finish developing mission and start translating it into "real projects that make a real impact on real people."[8]

Meaningfully involve frontline voices to better understand how racial capitalism[9] shapes the energy sector.

Member Vision for the Long-Term[10]

Create tools such as metrics, datasets, and an established resource hub for energy equity policy.[11]

Publish peer reviewed research, apply for funding, and continue building credibility in the field.

Influence the RFP processes of funding agencies that account for historic systems of inequities.

1. The following is a quote from a member about their motivation for joining the EERC:
"I also see this opportunity to identify questions, learn about new datasets, those kinds of things, as well as to deepen relationships outside of the academy, with stakeholders who are deeply affected or interested in the kinds of questions that we academics are studying. So those are challenging relationships to build, and to sustain. So any ways that that can be institutionalized, and sort of bringing people together, is always a positive potential of these kinds of networking opportunities."

2. The following describes what a member is hoping to get through this collaboration:
"From the academic side, it's an opportunity to learn what other scholars are working on...and to find areas for potential collaborations...Having an intentional place for those kinds of meeting of minds to come together can be very convenient. I also see this opportunity to identify questions, learn about new datasets, as well as to deepen relationships outside of the academy with stakeholders who are deeply affected by or interested in the kinds of questions that we academics are studying. Those are challenging relationships to build and to sustain. So any ways that that knowledge can be institutionalized is always a positive sort of potential for these kinds of networking opportunities."

3. A forthcoming governance proposal will be built on the Fellows' analysis of ideas and recommendations presented by interviewees.

4. When asked about building internal trust, one member raised questions about how trust cannot be developed when members lack certainty about the EERC purpose. Acknowledgement of misaligned understanding of the mission can lead one to leave the EERC. As one Dow Fellow observed, a question for the EERC is how important is being mission-driven and whether they are okay with having members who do not align with their mission completely or would they rather have a more mission-centric community?
"Here seemed to be some uncertainty about what the purpose of this Collaborative was (and perhaps that's why you're now speaking to everybody), some reservations about like, 'why participate in this? Like, what's its goal? How is it different from other kinds of efforts that are similar?' So I think uncertainty can breed maybe mistrust but also maybe just skepticism that this is going to be a useful application of people's time."

5. On the topic of clarity and trust building, one member said, "Expectation setting might give us a vision of what the trust requirements are, what type, what level of trust we need to have amongst members. But without that our expectation of trust is also going to be very, very diverse."

6. On the topic of information sharing, one member said, "I think just generally speaking, what we use, and how we share and protect information is going to be something that is going to be a big deal to many organizations."

7. Trust-building stems from sharing aligned values, but one member raised a concern that not everyone in the group shares anti-oppression/anti-racist values: "I didn't really feel like everybody was on the same page in terms of the people who are participating—not everybody has antiracism, or some other anti oppression stance or significant part of their work or backgrounds. So I guess I still have questions about that, like, given people are in various points of that journey. What do we make of that? Or how, how is that a safe space for BIPOC-led organizations if they feel like part of the group is aligned and part less so?"

8. To expand on this one member said, "I think that making an effort to turn results around into something public, targeted to policymakers...or [to] an audience that is responsible for the topic is really important."

9. This explanation comes from a outlying view that forecasts where the Collaborative could make a real impact.
"I think one year from now, the Collaborative will be valuable to the movement, if it has some of those things we talked about before, a specific and stated analysis of racial capitalism and oppression and the way that our current system upholds those,

and has a plan for how to flip that on its head by producing new literature and new analyses with the people most impacted."

10. Members had many ideas of how to include more representation in the long term of the Collaborative. "I think one thing that a collaborative like this could do would be to provide an opportunity for organizations and BIPOC communities to come to us with ' here's our problem, or here's our question, here's what we think needs to be addressed,' and have that be the starting point for research projects. The idea is to create some sort of mechanism by which problems as experienced by the communities themselves can be articulated to researchers who can then use that to help crystallize ideas and come up with ways to meaningfully work with the community directly."

"In longer term though, I think I could see the Collaborative supporting some efforts to even embed some staff members and things like that, from these various organizations that are members into kind of frontline communities to support these needs [various kinds of technical assistance] for like a longer term process. I think the Collaborative could just be a good intermediary and convener, where frontline communities can go to the Collaborative and it can be a trusted partner."

"There's a popular front that is pushing an anti-fascist, anti-racist, anti-white supremacist culture around researching and who research is delivered for and what it does. Neoliberal models of change-making have been eliminated from a majority of the types of people's social culture that we see today. So maybe a shorter pithier one is to say that, the culture around collaboratively producing research that speaks from the frontlines of climate injustice has shifted to be explicitly anti-fascist and has moved past failed neoliberal ideas of what change looks like."

11. "I would love to have a collective resource to be able to offer to BIPOC and frontline community groups—we get a lot of requests coming into EEP and I feel like we can't engage with all of those. So that would be really nice, having a group that I trust that can step in and provide support on whatever kind of data or energy equity metric means

community groups have. And then at a higher level, I would really hope that we can do something to push a few kind of key agenda items. I don't know how many other people are on board for say, like, working on a campaign to end [energy] shut offs to support something like that."

APPENDIX

Appendix IX: Revised Scope of Work

Deliverable 1: Co-design a communication strategy to support future collaborative convenings with our Project Advisor and Client Partner.
- Conduct Stakeholder Interviews with Collab members to identify their shared needs, visions, and aspirations for the network.
- Based on our findings from these interviews, recommend structures and tools for Collab organization and facilitation

Deliverable 2: Conduct a landscape analysis of existing energy equity networks and initiatives to assist Collab in expanding its outreach and creating a centralized resource advocating for the advancement of EEJ policies.
- Create a network map of the organizations and initiatives already working on EEJ initiatives throughout the country.
- Identify organizations tracking and compiling Justice40 data and initiatives.
- Identify BIPOC and frontline organizations to be actively involved in the Collab organization and research prioritization process.

Deliverable 3: Support authentic relationship building with BIPOC and frontline organizations (potential users of the Collab tools and research).
- Compile anti-racism and anti white supremacy resources for the Collab to use and implement within its work.
- Organize listening sessions with BIPOC and frontline organizations, to elevate their perspectives, recommendations, and aspirations on the ways in which the EERC can ensure its work is authentically rooted in and led by impacted communities.

Amended Scope of Work (August 1- December 1, 2022)

*** Team Reflection: After coming together as a team following the stakeholder interview presentation on 6/22, we realized that with the time we have left to complete the fellowship and Dow deadlines, we needed to regroup and reorganize our scope of work, in order to make it more realistic and achievable. Below is what we are proposing.*

For the sake of efficiency and ease of coordination, we would plan to split our team in half between Deliverable 2 and 3 , except for the stakeholder interview executive summary. Since schedules can often be divergent at the beginning of the semester, we also thought that one

advisor per deliverable would be most effective in helping us complete the work. Of course, joint feedback will be most welcome during a full team, advisor (Justin) and client liaison (Jacquie) meetings.

Deliverable 1: Conduct Stakeholder interviews and create a summary of key findings and observations for the future use of EERC members

- ☐ Conduct Stakeholder Interviews with Collab members to identify their shared needs, visions, and aspirations for the network.
- ☐ Synthesize key findings from presentation and interviews into a 2 page Executive Summary with a few attached appendices - Leadership team: Caroline + Tara

Will be up for Jacquie + Justin review and approval for sharing with the larger EERC membership by the end of September, 2022

Deliverable 2: Create a prototype of an EEJ Network Database

Leadership team: Claire, Moksha, Caroline
Proposed project advisor**s:** Jacquie and Amanda

Given our time constraints with meeting deadlines for the Dow Fellowship (fall update presentation, report and presentation preparation, and symposium), we think it would be best to put together a simple map prototype. This prototype would be based on feedback that we receive from Jacquie and interested EERC members. From there, we would offer pathways forward for building it out fully.

Comments from Jacquie and Justin:
- *Maybe a database (with keywords) is more valuable than a map. With a database at the foundation, we can always map it over time. I'd like to send you some Literature on organizational network mapping and then ask that you think about how to structure a database such that it can be used to prototype and eventually describe the EE network (Jacquie)*
- *Maybe we have a way of at least noting connections between orgs or orgs and existing coalitions (e.g. J40 accelerator grantees) to facilitate mapping later (Justin)*
- *It's less imperative that we draw the network diagram now than structuring the data so that we can develop the diagrams over time. For the purpose of your final deliverable, I think a network map would be a pretty cool outcome. (Jacquie)*
- *Defining the term "research" to be more inclusive*

- ☐ Consult with Jacquie and hold a focus group to solicit input from interested EERC members on what they would like to see in a EEJ network database and how they plan to use it
- ☐ Identify the dozen of organizations noted during EERC member interviews, and research additional organizations tracking and compiling Justice40 data and initiatives as well as BIPOC and frontline organizations to be actively involved in the Collab
- ☐ Based on these inputs, create a prototype (a rough database) featuring connections between organizations and existing collaborations/ coalitions identified during the member interview process
- ☐ Make recommendations for how to expand and maintain database
  - ☐ Suggested process for identifying and collecting information from relevant organizations
  - ☐ Suggested data management processes
  - ☐ Developing capacity to expand map (e.g. hiring an intern or getting another student group involved)

Team feedback 9/14
- Justin
  - Potential this could be used in concerning ways if frontline org names appear on the map
  - Think through protections of information
  - What research, tools, metrics created by collab members can others use? Are there any limitations on it?
- Jaquie
  - Energy Equity Researchers network
  - How do we define research?
  - Brainstorm the best approach from there
  - Look at Research Collab as an ecosystem - people involved in some Collab activities and others acting more on the peripheries of the work but collaborating with the EERC
  - Identify groups and individuals that we have not identified. What do we need in this database? Having a system in place to keep track and eventually visualize the network. Who are we missing? How are we in relationships with other researchers? Etc.
  - Focus groups - 3 opportunities
- Will

- - ○ Happy to help with this process
    - ○ Has to think through this question
  - ● Amanda
    - ○ If frame narrowly, don't have to worry about tokenizing frontline groups
    - ○ Database - researchers are a resource - frontline groups come to us as resource
    - ○ How to go about this work is still ambiguous
  - ● Moksha
    - ○ Purpose of a focus group would be to ensure that the scope of our work reflects the needs and vision of the EERC
    - ○ Goal is to create something that others can pursue into the future after the fellowship ends

Deliverable 3: Deliverable 3: Co-design an EERC Governance Strawman Proposal

Leadership team: Cat, Phong, Tara
Proposed project advisor: Justin, Will and Bobuchi

**Team Reflection: _Per Justin's feedback that it would be best to put together a governance proposal for EERC members to respond to, we decided that it would be best to not move forward in BIPOC and frontline community listening sessions but rather to include advice and recommendations on how to build authentic relationships with these groups in the EERC's future work._

Feedback from Jacquie:
- ● _"At the current stage of the EERC, which is still formative and informal, we want to concentrate on building a community joined by shared values and motivated to disrupt disparities in the energy system._
- ● _Instead of a document that reads as a legal framework, let's try to create a few page succinct and good-natured document that clarifies:_
  - ○ _What inspired the idea for this research community?_
  - ○ _Who are we (currently)?_
  - ○ _Guiding values and principles_
  - ○ _How do we define research_
  - ○ _What does it mean to be part of this Collaborative?_
  - ○ _What do we do?_
  - ○ _Why might I want to participate (costs and benefits)?"_

- ☐ Consult with Justin on what he envisions for this governance strawman proposal structure and he has drafted so far
- ☐ Using findings from the Executive Summary and Atlas.ti interview analysis and inspiration/ lessons learned from the governance structures of other similar collabs findings to fill out the "skeleton" of the proposal, which will be inclusive of:: 1) suggested membership rules; 2) , roles; 3) , mission; 4), structure; 5) , next steps; 6) possible funding pursuits; , proposed timeline;, and 6) knowledge sharing protocols.
  - ☐ Part of this effort would involve identifying other similar organizations/ collabs, such as the Energy Equity Project and Race Forward, and looking into their governance structures to draw inspiration and elevate lessons learned.
- ☐ Be sure to include when and how to think of engaging with BIPOC + frontline communities. This could include things like:
  - ☐ Put together a brief list of anti-racism and anti white supremacy resource examples for the Collab to build up, use, and implement within its work
  - ☐ Co-create a list of possible BIPOC and frontline organizations for the EERC to consider engaging with in order to have them provide feedback on the governance structure proposal draft put together by the fellows. The goal would also be to invite these orgs or individuals from these orgs to join the Collab in the process.
  - ☐ Explore different frameworks as a basis for inspiration - 17 Principles of EJ and Jemez Principles for Democratic Organizing

Team feedback 9/14
Justin
- What are options out there
- Not at the point of decision-making

Jacquie:
- Good start in the Exec Summary
- Collab have something to respond to
- If we can provide something for people to react to that will respond to

Amanda + Will
- More to contribute to network database
- Both happy to be flexible

Appendix X: Network Database Materials

Examples of Existing Network Maps

Examples of other network maps—not necessarily from energy space. The goal was to use some of these examples as potential ideas for creating discussion prompts for the focus group.

1. [Maine Immigration Rights Coalition](#) - members/partners structure, has an ecosystem map for identifying organizations under various categories
2. https://www.fs.fed.us/nrs/pubs/gtr/gtr_nrs189.pdf: See report pgs 31-32 (pgs 36-37 of the pdf itself) for a super interesting example! Called an "organizational collaboration network;" color-coded by sector and size-coded by in-degree statistic
3. https://storymaps.arcgis.com/stories/4356f618c46e464e82d23bfe5dc879e9: Scroll down for a map of "**spatial relationships** between the Bridger-Teton National Forest Offices (green squares) and the Partner Offices (red dots)" and keep scrolling for a "**network diagram showing relationships** between program areas (orange dots) on the forest and partners (blue dots)." This software (https://storymaps.arcgis.com/) might be useful for us!
4. Here is a [network map](#) that I was indirectly involved in helping build through my community engagement efforts as one of the Circular Economy (CE) Intern for the City of Ann Arbor. It is a pretty straightforward GIS map that features different CE entities across A2. Perhaps the network map could feature a map of the US (or the world) with different GIS layers featuring different sectors of the EE ecosystem. Just a thought.
5. https://www.providence.org/news/uf/666188315?streamId=7302425 - A page about network mapping that includes some examples with various components/features that could be of interest
6. https://kumu.io/UnLtdUSA/austin-social-entrepreneurship - Map of social innovation actors in Austin featuring both organizations and individuals, by UnLtd USA and the RGK Center
7. https://tgrebe.wixsite.com/belleislegovernance This is a map I (Tara) did for a class of the power structures on Belle Isle. The tabs have bubbles you can click on that will take you to an organization's website and learn about its connection to Belle Isle
8. [Colorado's Health Equity Advocacy Ecosystem](#)

Not an example of network map, but helpful resources:
1. [Energy Justice Network](#) has maps of all facilities in the US (biomass, coal, gas, etc). Can be helpful to work with since clusters of facilities could potentially indicate environmental justice networks
2. [Environmental Justice Atlas](#) - a global locator of environmental conflicts that can be filtered by country, company and commodities
3. https://storymaps.arcgis.com/stories/f57121c465ff4b1486b4733c8022eb22 - Justice 40 Accelerator storymap and map of current cohort
4. [Energy Justice Dashboard](#) - tracking DOE investments in overburdened and underserved communities
5. https://www.pinterest.com/elias0165/nonprofit-ecosystem-visual-ideas/: A bunch of different visualization ideas collected together on Pinterest
6. [Clark Fox Family Foundation in St. Louis provides Mapping Services](#)

More basic resources:
https://socialimpactarchitects.com/system-change-mindset/
https://cooperfdn.org/wp-content/uploads/2019/05/2018-11-NPN-Ecosystem-Presentation-WEBSITE.pdf

EERC Network Database - Dow Sustainability Fellows Recommendations

The Energy Equity Researchers Collaborative (EERC) is exploring the creation of a network database or map. Below is a summary of insights and recommendations from Dow Sustainability Fellows to move this initiative forward, based on input from a small group of EERC members. See Appx. 2 for a spreadsheet compiled by Dow Fellows that can be used as a starting point.

1. Purpose and audience

Purpose: To facilitate more effective collaboration by documenting organizations and projects represented within the EERC, organizations and projects connected to the EERC through collaborative relationships, and any energy equity research initiatives not represented within the EERC.
- ❖ For example, the database could enable frontline organizations to identify and connect with a local/regional EERC partner.

Audience: Begin with EERC participants as the primary audience, then expand.
- ❖ Start with an internal/private list, with the understanding that it will eventually have some public-facing elements (available for use outside of EERC members).
- ❖ Require data sharing and usage protocol for both public and private information. This may include a MOU for private data and guidelines posted with public data.

2. Featured organizations

Who: Start with current EERC organizations, then expand to organizations connected to the EERC through professional collaboration and organizations not yet connected.

How: Create, communicate, and implement a clear process for adding an organization as an affiliated party in the database. The process should be elective for those organizations.
- ❖ Define what types of organizations can be categorized as conducting energy equity and justice research.
- ❖ Create an intake, possibly modeled after this draft form, to capture organizational information. Organizations will not be automatically added to the database, they must opt-in.

3. Organizational Data

In the intake form, enable the organization to designate which fields are included, and which are public vs private.
- ❖ The form should include levels of EERC member affiliation, e.g, employee, partner, previous partner, etc. The term "partner" should be clearly defined and can only be used with consent from that organization.
- ❖ If funding permits, hire an intern or work with a student group to conduct one-on-one interviews with new organizations to provide additional context for the database project, understand their preferences, and ensure their involvement in the database is participatory and transparent.

Clear language: For categories describing the focus of an organization's research and services, use widely understood and/or clearly defined language.

> **Data maintenance**: Establish a process for maintaining data accuracy, such as an annual survey to confirm information
> **Note**: See Appendix 4 for a list of suggested data categories.

<u>**Background:**</u>
In January 2022, a team of six University of Michigan graduate students began working with the Energy Equity Researchers Collaborative (EERC) as Dow Sustainability Fellows. Part of our scope of work was to build on the idea for a network map to illustrate the organizations and work areas represented within the EERC, organizations and work connected to the EERC through collaborative relationships, and any energy equity research initiatives not represented within the EERC. The Network Database is also meant to avoid duplicative projects among EERC members and in the EEJ space more broadly.

<u>**Process**</u>: Though we initially planned to host one or two focus groups with EERC members to gather input on the direction of the network database, low response rates and a compressed timeline prompted us to opt instead for a short survey distributed to a select group of members. We sent the survey to seven EERC members who have been engaged with our Fellows team over the past few months, and we received five anonymized responses. Though the responses provide important insight for the creation of a network database, they are not necessarily representative of the EERC membership as a whole.

<u>**Recommended Next Steps:**</u>
1. Design and send intake form to all EERC participants.
2. Use new data to update spreadsheet.
3. Formally launch the database, thinking about the following questions: Where is it hosted, what does it look like?
4. Gather feedback from EERC participants and use it to inform a public-facing version
5. Develop a process for maintaining data accuracy, such as an annual survey to confirm information and designate an EERC participant to lead this aspect (e.g. delegating to an intern).
6. Use data to identify gaps in EERC network, especially regarding BIPOC-led and frontline groups.

<u>**Appendices**</u>
1. <u>Initial spreadsheet</u>
2. <u>Survey results</u>
3. <u>Draft intake form</u>
4. List of data categories:
   - ❖ Organization name
   - ❖ Staff name and bios
   - ❖ Contact information
   - ❖ Organization type/structure, e.g. nonprofit organization or initiative, professional association or trade organization, formal coalition or network, public/government entity, informal or peer collaboration, for-profit organization, academic institution
   - ❖ Organization Mission / vision
   - ❖ Regional/geographical focus
   - ❖ Sectoral focus, e.g. buildings, electricity, transportation, efficiency
   - ❖ Research or skill focus:

EERC Network Database: Intake Form Template

The EERC is developing a Network Database to illustrate the organizations and work areas represented within the EERC, organizations and work connected to the EERC through collaborative relationships, and any energy equity research initiatives not represented within the EERC. The Network Database is also meant to avoid duplicative projects among EERC members and in the EEJ space more broadly. Kindly fill out the following form if you are interested in having your organization represented within the database. Each field is optional, and you may indicate for each question whether you would like the content you share to be private (only EERC participants can see) or public (available online once the Network Database is published more widely).

Introductory Information

1. Name of Organization

   _____

2. Name of Organization: Would you like this information to be public or private?

   Mark only one oval.

   ◯ Public

   ◯ Private

3. Name of Participant

   _____

4. Name of Participant: Would you like this information to be public or private?

   Mark only one oval.

   ◯ Public

   ◯ Private

5. Participant Role in Organization

_____

_____

_____

_____

6. Participant Role in Organization: Would you like this information to be public or private?

Mark only one oval.

◯ Public

◯ Private

7. Participant Contact Information (Email)

_____

8. Participant Contact Information: Would you like this information to be public or private?

Mark only one oval.

◯ Public

◯ Private

9. Participant Bio (100-200 words)

Mark only one oval.

◯ Option 1

10. Participant Bio: Would you like this information to be public or private?

Mark only one oval.

◯ Public

◯ Private

Organizational Information

11. What is your organizational mission / vision

_____

_____

_____

_____

_____

12. Organizational mission/ vision: Would you like this information to be public or private?

Mark only one oval.

◯ Public

◯ Private

13. How would you describe the structure/type of organization you represent?

Mark only one oval.

◯ Nonprofit organization or initiative

◯ Professional association or trade organization

◯ Formal coalition or network

◯ Public/government entity

◯ Informal or peer collaboration

◯ For-profit organization

◯ Other

If "Other," please describe

14. Organization type/ structure: Would you like this information to be public or private?

    Mark only one oval.

    ◯ Public

    ◯ Private

15. What is the regional/geographical focus of your organization? (e.g., Southeastern U.S., International?)

    _____

16. Regional/geographical focus: Would you like this information to be public or private?

    Mark only one oval.

    ◯ Public

    ◯ Private

17. What is the sectoral focus of your organization? For example, do you work with buildings, electricity, transportation, energy efficiency, etc?

    _____

18. Sectoral focus: Would you like this information to be public or private?

    Mark only one oval.

    ◯ Public

    ◯ Private

19. How would you describe the research or skills focus of your organization?

Mark only one oval.

- ◯ Focused on mapping
- ◯ Lived experiences and qualitative emphasis
- ◯ Policy platforms and database development
- ◯ Policy writing and/or advocacy
- ◯ Racial and economic justice
- ◯ Screening tools
- ◯ International focus
- ◯ Facilitation
- ◯ Technical & funding assistance with frontline communities
- ◯ Other

20. If "Other," please describe

_____

21. Research/Skills focus: Would you like this information to be public or private?

Mark only one oval.

- ◯ Public
- ◯ Private

22. Who is your organization's target audience? (This can overlap with org type, skill and sectoral focus)

_____

19. How would you describe the research or skills focus of your organization?

Mark only one oval.

○ Focused on mapping

○ Lived experiences and qualitative emphasis

○ Policy platforms and database development

○ Policy writing and/or advocacy

○ Racial and economic justice

○ Screening tools

○ International focus

○ Facilitation

○ Technical & funding assistance with frontline communities

○ Other

20. If "Other," please describe

_____

21. Research/Skills focus: Would you like this information to be public or private?

Mark only one oval.

○ Public

○ Private

22. Who is your organization's target audience? (This can overlap with org type, skill and sectoral focus)

_____

23. Target audience: Would you like this information to be public or private?

Mark only one oval.

○ Public

○ Private

24. Alignment with Jemez / EJ / Climate Justice principles

_____

25. Alignment with Jemez / EJ / Climate Justice principles: Would you like this information to be public or private?

Mark only one oval.

○ Public

○ Private

Current Work & Funding

26. What collaborations do you currently have with other initiatives or funding sources?

_____

_____

_____

_____

_____

27. Collaborations with other initiatives/funding opportunities: Would you like this information to be public or private?

Mark only one oval.

○ Public

○ Private

28. What current and upcoming projects would you like people to know about?

_____

_____

_____

_____

_____

29. Current and upcoming projects: Would you like this information to be public or private?

Mark only one oval.

◯ Public

◯ Private

30. Any major energy based/energy equity funding your organization has received in the past or currently (based on public information):

_____

_____

_____

_____

_____

31. Major energy based/energy equity funding your organization has received in the past or currently: Would you like this information to be public or private?

Mark only one oval.

◯ Public

◯ Private

Energy Equity & Justice Network Database

Prepared by:

Claire Doyle, Caroline Leland, and Moksha Menghaney

University of Michigan Dow Sustainability Fellows

Advised by:

Amanda Dewey, American Council for an Energy-Efficient Economy (ACEEE)

Jacquie Moss, LBJ School of Public Affairs, The University of Texas at Austin

Impetus for the Project

Identify:

- **Organizations represented within the EERC**

- **Organizations connected to the EERC through collaborative relationships**

- **Any energy equity research initiatives not represented within the EERC**

Interviews Provided Additional Context:

EERC members have a **shared desire** to...

- **Amplify** existing EEJ work

- **Exchange knowledge**

- **Identify network gaps**

Developing Clarity on Governance[3]

Decide on flat vs. hierarchical organizational structure; establish membership roles and expectations.

Clarify process for membership recruitment and onboarding; provide resources for new members.

Improving Collaboration

Provide collaborative opportunities like breakout groups in meetings and working groups outside of meetings.

Consider opportunities for internal relationship building like an in-person conference or retreat

Building Trust Internally[4]

Members need to agree on the definitions of research and energy equity to find value alignment.

Providing clarity[5] on member roles and creating opportunities for internal engagement will build trust.

Establish knowledge-sharing protocols and prioritize transparency with funding and decision-making.

"I think just generally speaking, what we use, and how we share and protect information is going to be something that is going to be a big deal to many organizations."

Building Trust Externally

Seek permission from BIPOC / frontline communities before engaging with them in research.

Expand pre-existing relationships with BIPOC / frontline groups before developing new relationships.

Allow BIPOC / frontline individuals to inform EERC's priorities as the collaborative evolves.

"Setting the right expectations for meetings and projects would be really important so everyone knows where we're coming from and where we hope to go as a group."

Member Vision for the Short-Term

Develop credibility by networking with similar organizations and recruit new members (especially BIPOC).

Finish developing mission and start translating it into "real projects that make a real impact on real people."[6]

Meaningfully involve frontline voices to better understand how racial capitalism shapes the energy sector.

"The Collaborative must understand how racial capitalism is upheld by current systems and plan for how to flip that narrative." [7]

Member Vision for the Long-Term[3]

Create tools such as metrics, datasets, and a establish resource hub for energy equity policy.

Publish peer reviewed research, apply for funding, and continue building credibility in the field.

Influence the RFP processes of funding agencies that account for historic systems of inequities.

"We need to provide a pathway for these funding agencies to help us develop the data for a future that we can actually support."

But many questions were unclear...

1. **Who is the audience?**

2. **Which organizations should be included?**

3. **What data should be featured?**

Network map → Network database proposal

Survey Findings

- **Semi-public database with limits on use**

- **Broad vs. narrow?**

- **Opt-in process that clearly describes *how* data will be used**

- **General consensus on what data should be included**

Recommendations

- **Start narrow, then broaden**

- **Design an opt-in process**

- **Establish data-sharing protocols and usage guidelines**

- **Establish member affiliation levels**

Next Steps

- **Look for upcoming one-pager that summarizes this information**

- **At a future EERC meeting, discuss as a group our findings and recommendations in order to move the project forward!**

Thank you

Thank you so much for allowing us to work with you this year, and thank you to all who helped us along the way!

Appendix XI: Governance Proposal and Related Materials

ENERGY EQUITY RESEARCHERS COLLABORATIVE (EERC)

GOVERNANCE PROPOSAL

Prepared by Cat Diggs, Tara Grebe, Phong Hong
Advised by, Will Bryan, Bobuchi Ken-Opurum, Justin Schott

TABLE OF CONTENTS

SUPPORTING DOCUMENTS (INCLUDED SEPARATELY)

EXECUTIVE SUMMARY

Since its inception in 2021, the Energy Equity Researchers Collaborative (EERC) has identified a primary goal of developing its governance structure by the end of this year. In one-on-one interviews with a team of Dow Sustainability Fellows, members have expressed a need for the EERC to establish a governance system as a way for the Collaborative to achieve short-term success. Having a solidified governance system is necessary for members to be able to fully assess their level of commitment, take ownership of projects and initiatives, as well as determine whether the EERC is the right space for them.

Based on membership interviews, research on existing organizations, and previous EERC brainstorm sessions, the proposal draws out seven key recommendations for informing its governance structure. These governance considerations are followed by recommendations about how EERC could raise funds and build capacity to ensure its long-term sustainability.

Key recommendations to the EERC are derived from membership interview insights, June 22 Meeting EERC Membership Brainstorm, as well as research on organizations within the energy equity and racial justice space. Recommended by the advisors of this project, these organizations are NY Renews, Race Forward, United Frontline Table, Network for Energy, Water, and Health in Affordable Buildings (NEWHAB), and the Climate Funders Justice Pledge (to learn more about the leaders of this movement, refer to the CFJP's Movement Networks webpage). The governance proposal provides offers models, resources, and considerations for:

> (1) establishing non-extractive information sharing protocols,
> (2) centering BIPOC and frontline involvement,
> (3) recruiting and retaining members,
> (4) developing a process for joining, orienting, participating in, and exiting EERC,
> (5) defining membership roles,
> (6) identifying meeting frequency, and
> (7) establishing decision-making processes.

Centering Black, Indigenous, and People of Color (BIPOC) and frontline community voices is a priority among EERC members. Meaningful engagement and involvement of those voices requires a mission that clearly signals shared values of equity and justice among members. Built upon the values identified by members, the EERC can hold itself accountable to ensuring that its research practices do not perpetuate the extractive and violent histories of research carried out on BIPOC and frontline communities. As the EERC solidifies its governance structure, it is equally important for the Collaborative to recognize that many members have expressed that BIPOC and frontline communities should play a central role in refining and consolidating this governance structure.

I. INTRODUCTION

A. About this Governance Proposal

This proposal seeks to provide a baseline for how the Energy Equity Research Collective (EERC) can move forward with establishing a governance structure. The recommendations in this document have been compiled by a group of Dow Sustainability Fellows from the University of Michigan (see Appendix A for more information about this fellowship program) in collaboration with a team of EERC member volunteers. Following a series of interviews with each member of the Collaborative, a need for a governing structure (diversifying membership, membership roles, participation structures, decision-making processes, etc.) within the organization was identified. The ideas put forth in this document stem from the ideas that EERC members presented within the interviews that the Dow fellows carried out with them in the summer of 2022. This proposal provides a baseline for discussion and will continue to be a living document as the EERC further defines what governance means for the Collaborative. For more information about the rationale behind this proposal, refer to Appendix B.

B. How the Document is Organized
Section II provides key background information about the EERC, builds upon value and mission building exercises that the EERC has already completed and provides resources that explain how the Collaborative can consider organizing its research ethic.
Section III provides recommendations for many aspects of governance that the EERC should consider exploring. Each recommendation is placed under a themed heading and further explanations are organized into bullet points.

Supporting Documents have been provided to build on this proposal:
Final EERC Presentation is the slide deck presented by the Fellows at the November 14, 2022 EERC Meeting.

EERC Scope of Work & Tool-Building Recommendations provides additional recommendations for the EERC related to topics other than governance.

Governance Proposal Appendices organizes additional information that provides further context for this document but are not necessarily related to the governance piece of the work.

II. About the EERC & Proposed Research Ethic

Interest in ensuring equity within energy efficiency and clean energy programs, policies, and investments is skyrocketing. Justice40, the signature environmental justice initiative of the Biden Administration, requires that at least 40% of the benefits of clean energy investments are received by 'disadvantaged communities[1].' State public utility commissions (PUCs) are also proposing new requirements to define and meet equity targets that will influence hundreds of billions in investments and determine the extent to which historically marginalized BIPOC and frontline environmental justice communities can participate in the clean energy transition. Despite the urgent need for energy equity metrics, creating and disseminating these metrics is led primarily by a small number of academic, government, and non-profit researchers and practitioners.

To respond to this growing need and limited organizational capacity, the Energy Equity Project (EEP) and American Council for Energy-Efficient Economy (ACEEE) came together to identify priorities for a potential future energy equity metrics collaborative. The Energy Equity Researchers Collaborative (EERC) was therefore formed to meet the demand for technical assistance from various stakeholder groups and to make energy equity metrics and data more accessible to the public.

For a full list of the current EERC members, you can click here.

A. EERC Purpose

The visioning work that EERC members carried out in December of 2021 and February of 2022 defined the following sets of purposes for the EERC.

Hold creative space to generate ideas and explore solutions
- Share and request knowledge, research activities, and research methods related to energy equity projects.
- Co-create a framework of terminology, metrics, and research methods.

Invest time and resources in BIPOC, frontline, and vulnerable communities
- Work together to build products that will be utilized by BIPOC and frontline communities.
- Be an available, relevant, accessible, and responsive resource.

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[1] The White House Justice40 Initiative defines disadvantaged communities as communities that are "marginalized, underserved, and overburdened by pollution".

- Hold each other in the EERC accountable to practicing anti-racism, combating white supremacy, working authentically with BIPOC, frontline, and vulnerable communities.

Amplify the conversation about the need for energy equity metrics and research
- Work together to inform and train others outside the EERC
- Track success stories, issue areas, knowledge gaps.

To learn more about the EERC's deliberation on the purpose and values of the Collaborative, refer to this [Google folder](#) and to the [Energy Equity Researchers Collaborative (EERC) Overview](#).

B. EERC Guiding Values

- Authentic, collaborative community
- Active foregrounding (not passive or objective engagement) of equity values: courageous, rebellious, anti-racist, liberating
- Non-extractive work WITH impacted communities
- Data-driven, rigorous
- Transparent

Refer to [Appendix C and D](#) for a draft mission statement and draft guiding principles, which could serve as examples of what the EERC might eventually decide to format, edit, and publish on a website.

C. EERC Proposed Research Ethic

Building off the above-described values, the EERC holds itself accountable to ensuring that its research practices do not perpetuate the historically extractive and violent research carried out on BIPOC and frontline communities. Instead, the Collaborative strives to produce research in reciprocal partnerships with these communities and recognizes that only centering government and academic research in its efforts will perpetuate cycles of inequity in the research space. Community-based research efforts done by or in collaboration with BIPOC and frontline researchers should therefore be elevated. The EERC should also consider avenues for ensuring that its members and partners are able to express concerns about research projects happening in the EERC's orbit, whether it'd be about the ethics of that research, its design, its policy implications, etc.

Additionally, a definition of the scope of the EERC's research and the limits of the group must be defined by members themselves. However, a robust basis for responsible environmental equity research has been developed in the past by diverse coalitions and these frameworks should be centered by the EERC as a starting point for developing its research ethic. In this context, the Collaborative affirms the Jemez Principles of Democratic Organizing and the 17 Principles of Environmental Justice in its work and approach to partnerships with communities.

Once the EERC has formed, it invites community members to shape its internal justice work, to request support for projects in their specific communities, and to guide collaborative work that would benefit multiple communities.

For more information about the Jemez Principles and the 17 Principles, see Appendix E.

III. EERC Recommendations

Earlier this year, the EERC identified four goals to accomplish in 2022. Defining governance and membership was one of those priorities for the Collaborative. Key governance, funding and capacity-building recommendations to the EERC, which are outlined below, are derived from membership interview insights, the June 22 Meeting EERC Membership Brainstorm, as well as research on organizations within the energy equity and racial justice space. Recommended by the advisors of this project, these organizations are NY Renews, Race Forward, United Frontline Table, Network for Energy, Water, and Health in Affordable Buildings (NEWHAB), and the Climate Funders Justice Pledge (to learn more about the leaders of this movement, refer to the CFJP's Movement Networks webpage).

For the full description of the work of these coalitions, as it relates to the EERC, refer to Appendix E.

A. Governance Recommendations

1. Membership Recruitment , Requirements & Commitments
1. EERC members have expressed an interest in open-membership, which is defined as allowing interested individuals or organizations who have been preliminary screened through a personal invitation or membership form to participate in the EERC meetings. Once they have joined for an agreed upon number of meetings, they can decide whether the EERC is right for them.

This partial self-selection process enables the EERC to foster a welcoming space while allowing for more defined membership engagement with time. Here are some examples of membership interview quotes:

   a. "I suggest remaining as open as possible and inviting any and all participants to be observers. Once people self-select to work on projects, more stringent participation requirements should kick-in."
   b. "In the spirit of energy democracy, it should be open and available to anyone who wants to participate."
   c. "There are advantages to being pretty open to new members who may not necessarily be prepared to jump to some hurdles or be as actively involved, it can help spread the word about initiatives that people are working on, if nothing else."

2. Screening for fit is necessary to ensure that interested members or organizations have aligned values and principles with the EERC.
3. In terms of membership engagement, members suggested that new members should be given the opportunity to observe prior to committing to set responsibilities as outlined by working groups or subcommittees.
4. To facilitate membership recruitment, the EERC should consider creating an online membership form that is accessible through a website or link. Based on NY Renews' membership form and YWCA Kalamzoo Racial Justice Collective's membership form, the EERC can include questions about:

   a. Engagement with BIPOC organizations, such as "do you primarily work in/with communities of color? Are you led by people of color?"
   b. Capacity and availability such as "what kinds of capacities is your organization willing to help with?"
   c. Values, such as "describe your personal identities and how they shape your navigation of your daily life?"
   d. Interpersonal questions such as, "spaces of honest, critical, and often challenging reflection/dialogue are integral components of the EERC's work. How do you lean into conflict while still maintaining relationships?"
   e. The EERC can also include points of unity for the EERC and a list of value-based statements at the beginning of the form, which interested organizations can easily identify and assess prior to expressing their interest in the EERC.
   f. The Climate Funders Justice Pledge has established an interesting 4-step process for becoming a CFJP "Pledger":
      i.   Taking the Pledge.
      ii. Uploading grant data within 2 months of taking the pledge.

       iii.   Sharing the percentage of funding going to BIPOC-led groups within 3 months of taking the pledge.

       iv.   Directing "at least 30% of all U.S. climate giving to groups run by, serving, and building power in communities of color in the U.S." within 2 years of taking the pledge.

   g. Could the EERC use this model as an inspiration for a framework that would increase members' commitment to the mission and vision of the EERC over time?

2. Process of Joining & Exiting the EERC

1. It is important for the EERC to set up protocols for joining and exiting the EERC, in order to foster a culture of consent, accountability and mutual respect among Collaborative members.
2. Some key questions should be considered in this context:
   a. Is there a way to protect the values of the EERC without making it exclusive and screening people out?
   b. One member stated, "I wonder if the best approach is to not set limits on who can join, but to set behavioral guidelines that would make clear when a partnership wasn't working out. I kind of worried that if we set strict parameters ahead, we might actually miss some of the underrepresented organizations who might want to join and don't have to go through hurdles of checking certain boxes."
3. The EERC should consider creating and/or refining existing onboarding documents. Here are a few examples of what these documents could contain:
   a. Background about the EERC
   b. Mission/values/research ethic
   c. Membership role options
   d. A member database with contact information and a short biography would allow current and new members to get to know who is in the Collaborative and the reasoning behind why they are involved. As one member suggested, such a database could include answers to common questions, such as "What do you envision an equitable future to be?", so that members can identify where there might be common ground and potential for future collaboration. This would also be helpful to identify any interest gaps that could be filled as the EERC recruits new members.
4. Protocols for exiting:

      a. Members should update the EERC when they're leaving and if comfortable provide a point of future contact. If their organization wishes to continue to stay involved they should appoint a replacement.

      b. Providing a reason for leaving shall not be required but is welcomed.

3. Working Groups & Membership Roles and Participation Structures

1. During membership interviews, some EERC members expressed an interest in splitting the Collaborative off into separate working groups. Perhaps the EERC could consider forming a first set of working groups based on the Collaborative's pressing need to develop a stronger sense of directionality in its mission, scope of work, and involvement with BIPOC and frontline communities.

2. Here are a few examples of working groups that could be formed:
   a. Mission/Vision/ Values refinement and alignment
   b. Key definitions
   c. Decision-making processes
   d. Scope of research work
   e. BIPOC and frontline org recruitment and involvement
   f. Development of information-sharing protocols
   g. Fundraising
   h. Tool development: social media, web presence, etc.

3. Membership roles could be defined based on which working groups members would like to be part of. Once the work of establishing the EERC is further complete, new working groups could be formed

4. The Collaborative could simultaneously consider establishing different tiers of involvement for EERC members such as:
   a. EERC Coordinator/Facilitator (1-2 members)
   b. Leadership/steering committee
   c. Core research members
   d. Community advisors
   e. Community partners
   f. To learn more about the participation, role and structure requirements of these different types of roles, refer to pages 2-7 of the EERC membership & governance brainstorm document.
   g. The table below provides a template for streamlining the roles and responsibilities of different types of possible member positions in the Collaborative.

Title	EERC Coordinator/Facilitator (1-2 members)	Leadership/ Steering Committee	Core Research Members	Community Advisors	Community Partners
Participation					
Roles					
Structure					

4. Centering BIPOC & Frontline Involvement

1. While inviting BIPOC and frontline organizations into the EERC is one of the goals for 2022, members of the Collaborative recognize the importance of facilitating partnerships with these organizations, as the Collaborative builds its governance structures. The EERC envisions that they will guide anti-racist and anti-oppression commitments and practices and specific projects taken on by the collaborative.

2. In other words, how can the governance structure that the EERC builds be flexible enough and provide enough options for BIPOC and frontline organizations to be central in helping shape it?

3. The EERC should therefore define the goal of representation (e.g. set number of leadership roles by frontline orgs).

4. The EERC should also consider co-creating a list of possible BIPOC and frontline organizations to invite to join the Collaborative. Possible avenues for inviting BIPOC and frontline orgs, include:

   a. The United Frontline Table consists of around 14 frontline organizations that work directly with BIPOC communities. This organization is also in a similar pivoting stage as the EERC and looking into how this organization elevates BIPOC voices within their work would be helpful to the growth of the Collaborative.

   b. CFJP has put together a list of Supporters and BIPOC Climate + Energy Justice PhDs. Perhaps the Collaborative could consider inviting some of these scholars and supporters to join the EERC in a meaningful way?

   c. The Energy Democracy Project "is a collaboration of more than 30 diverse, local, frontline organizations across the U.S. to strengthen their collective efforts to democratize energy and advance the emerging energy democracy movement in the United States." You can refer to the Project Collaborators at this link.

5. The Collaborative should also consider how it will provide a platform for these groups to help shape the mission and work of the EERC. Here are few examples of steps that the EERC can take to engage in this process:
    a. Creating an outreach strategy (preparation of an invitation letter, phone calls, emails) to engage with the orgs listed in step 4 of this recommendation.
    b. Should designated members be responsible for invitations? Should a BIPOC and frontline org recruitment working group be formed at the EERC?
    c. Providing participation honorariums for BIPOC and frontline organizations as an important first step toward creating reciprocal partnerships.
    d. Ensuring that new members are properly onboarded into the EERC and its current efforts.
    e. Consulting with onboarded member BIPOC and frontline organizations separately from full membership meetings to allow them the time to further help shape the mission, values, governance and activities of the Collaborative .
6. The EERC should tap into existing lists of anti-racism and anti white supremacy resources to build up its own list, which it would use, center, and implement within its work.
    a. [U.S. Sustainability Directors Network](#)
    b. What other lists might the EERC tap into?
    c. How could the EERC create and curate its own from there?

5. Meeting Frequency & Structure

1. One of the biggest barriers to internal collaboration that the EERC faces is that there is not always space in longer zoom meetings for members to get to know each other, particularly in an informal way.
2. It was recommended by members that the Collaborative meet more frequently but for less time at each meeting to alleviate some of the schedule burden/time conflict for members.
    a. In this context, it would be important for the Collaborative to identify a structure for membership responsibility for agenda-building and agenda minute note-taking.
3. A complimentary option would be to establish working groups (for more detail, see recommendation 3).
    a. Working groups could meet more regularly than the whole of the Collaborative.

b. Full Collaborative meetings could be used for different working groups to share the work they have been doing and for collective decisions to be taken i.e. votes?

c. Such a Collaborative member structure would not only make it easier to schedule meetings but it would also foster collaboration and allow members to follow the research topics they are passionate about.

4. One member stated in an interview - "one hindrance for collaboration, I think for myself, not knowing the group that well." In this context, some members put forward the idea of an in-person retreat as a means to strengthen existing relationships, build interpersonal relationships through informal exchanges, and build trust, which can later foster collaborations and team-building.

a. Given that the Collaborative is spread all across the country, a retreat would provide an opportunity to gather in a way that normally might not be possible.

6. Establishing Information Sharing Protocols

1. A few members expressed concern about the Collaborative not seeming to have information protocols in place. Here a couple member quotes from interviews:

a. "I think just generally speaking, what we use, and how we share and protect information is going to be something that is going to be a big deal to many organizations."

b. "Who has access to all those things? Where do they get to share them? I don't know anything about that. I wouldn't put any of my best ideas down there. My ideas are taken from me all the time. And they show up in a grant somewhere else. So I think there's not any kind of structure for what the information sharing is or does or, or who it benefits when we share information. That kind of lack of clarity. That ambiguity is how a lot of mainstream culture works, but I don't think it will work in the form that EERC says it wants to be working in."

2. What form could these protocols take? How can the EERC leverage expertise within its membership to establish these types of protocols for the Collaborative?

7. Formalize Decision-Making & Operating Agreements

1. For this section, recommendations already put forth by Collaborative members on page 7 of the EERC membership & governance brainstorm were incorporated.

2. The decision-making processes that the EERC will establish should be rooted in the values that the EERC upholds as a Collaborative, notably of authenticity, collaboration, equity, justice, and transparency. In short, decision-making processes should foster a culture of <u>consensus-building</u> among Collaborative members.
   a. Does this mean full group votes?
   b. Will there be ways for members to participate in decision-making remotely if they cannot join a meeting?
3. The EERC should decide if it wants to foster flat or vertical leadership structure or a combination of the two.
   a. As an example, operating policies and practices should potentially be the responsibility of leadership and community advisors (see recommendation 3.4) to develop (with help from core members) once membership is formalized.
4. Communication among members should be direct and non-violent.
5. Protocols on the following themes should be established:
   a. Conflict resolution, particularly when a member is not aligned with purpose, values, and principles. Removal should be conceived as a last resort but a process should be in place, particularly if there are stipends involved.
   b. Restorative justice protocols.
   c. Confidentiality and transparency policies.
6. From an Organizational autonomy standpoint, members must sign on to the purpose statement, values and principles, but have the option to participate, support, or endorse any specific project put forth by EERC.
7. The EERC will uphold principles of non-partisanship and will therefore not endorse specific candidates or take any other political position that would conflict with legal 501(c)3 activities.
8. The EERC should strive to implement equitable budgeting policies - e.g. at least 50% of all EERC funds will be received by BIPOC-led and frontline community orgs in the form of stipends or project grants.
9. The EERC should also strive to establish equitable representation goals, especially when it comes to leadership roles in the Collaborative.

B. Funding and Capacity-Building Recommendations

8. Funding
1. If the EERC members decide they would like the Collaborative to be more active in the energy equity research space, it should strongly consider

applying for funding in order to support its work and to make it more sustainable for those who participate in it, as all members have full time positions and responsibilities to tend to.

2. Funding for the Collaborative will, for example, provide EERC members with participation stipends, which will incentivize attendance and active participation from the membership.

3. What types of foundations or donors could be interested in funding the work of the EERC? What type of funding would benefit the EERC (participation stipends, research funding, etc.)?
    a. Consider the List of pledgers, which the CFJP put together as a possible avenue for the EERC to receive funding once it increases its BIPOC and frontline representation.

4. NEWHAB's climate funding toolkit provides an example of how to compile grants/funding sources into a resource hub for frontline groups. This organization is funded by several Philanthropy Serving Organizations (PSO's) and creates funder communities to organize grant funding in more accessible ways. While they operate with a different structure from the EERC, it shows a pathway of how funding structures can promote projects that center around an organization's values.

5. Which EERC member org(s) could be the fiduciary for this funding?

9. Capacity-Building

1. Being that many members of the Collaborative are stretched quite thin, perhaps the EERC should consider hiring a facilitator or a facilitator group to help further establish its governance structure and programmatic actions.
    a. The Work Department in Detroit is a good example of a nonprofit that was formed specifically to help groups like the EERC get further established .
    b. NEW is another another good example of such a group.
    c. Center for Socially Engaged Design is a University of Michigan-based group that specializes in facilitation.

2. Getting a new group of student interns involved.
    a. It is important for the EERC to clearly define the scope of work of interns that would get involved in this work so that the partnership can be mutually beneficial.
    b. Which other universities could be interested in building a partnership with the EERC?

i. A note that the EERC received funding in kind from the Dow Foundation - 1 year of work from a team of 6 University of Michigan graduate students.

EERC Governance Proposal Presentation

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Outline

1. **Rationale behind this proposal**
2. **Reasserting the purpose and values of the EERC**
3. **EERC Governance Structure Recommendations**

→ **Centering BIPOC and frontline organizations throughout the process**

Goals:
- **Review and discuss each recommendation**
- **Define next steps to adopt or resolve**

Rationale

A governance structure is needed to:

- **Provide clarity** that members and potential members need to determine whether the EERC is the right space for them and how they can be engaged.

- Create a path to **operationalize the EERC purpose and uphold its values**

- **Empower members to take ownership** of projects and initiatives

  Methods: *Membership interviews (see executive summary) , reviewing brainstorm EERC document, and research on organizations (New York Renews, Race Forward, United Frontline Table, NEWHAB, Climate Funders Justice Pledge)*

EERC Purpose & Values

EERC Purpose

Collaboratively developed and adopted during EERC meetings (December 2021 and February 2022):

- **Hold creative space to generate ideas and explore solutions**
    - Share and request knowledge, research activities, and research methods related to energy equity projects
    - Co-create a framework of terminology, metrics, and research methods
- **Invest time and resources in BIPOC, frontline, and vulnerable communities**
    - Work together to build products that will be utilized by BIPOC and frontline communities
    - Be an available, relevant, accessible, and responsive resource
    - Hold each other in the EERC accountable to practicing anti-racism, combating white supremacy, working authentically with BIPOC, frontline, and vulnerable communities
- **Amplify the conversation about the need for energy equity metrics and research**
    - Work together to inform and train others outside the EERC
    - Track success stories, issue areas, knowledge gaps

EERC Values

Authentic, collaborative community

Active foregrounding (not passive or objective engagement) of equity: courageous, rebellious, anti-racist, liberating

Non-extractive work WITH impacted communities

Data-driven, rigorous

Transparent

Invite refinement by BIPOC and frontline organizations

What would make this a safe, culturally relevant and accessible space?

Consider adopting Jemez Principles and Principles of Environmental Justice

Formalize what purpose and values look like in practice

DOW SUSTAINABILITY FELLOWS
UNIVERSITY OF MICHIGAN

JEMEZ PRINCIPLES

Be inclusive

Emphasis on bottom-up organizing

Let people speak for themselves

Work together in solidarity and mutuality

Build just relationships among ourselves

Commitment to self-transformation

Governance Recommendations

Recommendations summary:

1. Establish membership definition
2. Create joining and exiting process
3. Define membership roles
4. Center BIPOC & frontline involvement
5. Meeting frequency & structure
6. Establish information sharing protocols
7. Formalize decision-making & operations
8. Funding & capacity building

1. Establish Membership Definition & Process

- **CURRENTLY: open-membership.** Interested individuals or organizations or known EERC members receive an invitation to participate.

- **FUTURE: mutual agreement** by EERC:
  - Recruiting and outreach
    - Broadening the definition of energy equity research to be more inclusive
    - Considering existing representation and whether potential new members align with the goal of centering BIPOC and frontline voices.
  - Application or nomination form
  - Screening for fit and alignment with values and principles
  - Onboarding process and connecting with existing members

"There are advantages to being pretty open to new members who may not necessarily be prepared to jump to some hurdles or be as actively involved, it can help spread the word about initiatives that people are working on, if nothing else."

2. Process For Joining and Exiting

It is important for the EERC to **set up protocols for joining and exiting** the EERC, in order to **foster a culture of consent, accountability** and **mutual respect** among Collaborative members.

Entering:
- Create an onboarding document that would include:
  - Background, mission and values, membership roles, and a membership database with biographies

"I think connecting people (like you're onboarding) if there was almost like a yearbook of where you could see people's headshots and bios and interests, maybe even answers to similar questions"

Exiting:
- Members should notify the collaborative of their leave
  - May provide a reason but not required

3. Define Membership Roles

Possible roles
- EERC Coordinator/Facilitator (1-2 members)
- Leadership/steering committee
- Core research members
- Community advisors
- Community partners

Discussion: What roles are essential and which should be considered for the future?

4. Center BIPOC and frontline involvement

Facilitating partnerships with BIPOC and Frontline organizations as the Collaborative builds its governance structure is equally as important as the goal of inviting them as members. The EERC envisions that they will guide our anti-racist and anti-oppression commitments, practices, and specific projects taken on by the Collaborative. The first steps that the EERC should take should be to:

a. **Define goal of representation** (e.g set number of leadership roles by frontline orgs)
b. **Create a list** of possible BIPOC and frontline organizations to invite
c. Consider **how EERC will provide a platform** for these groups to meaningfully shape the mission and work of EERC
d. Tap into existing lists of **anti-racism and anti white supremacy resources** to inspire building its own list for distribution among EERC members

5. Meeting Frequency & Structure

- Meeting **more frequently but for less time** to alleviate schedule burden

  "I think it's still more about relationship building so I hate to be asking for more meetings but I feel like at this point it's just people need to be talking more"

- Establishing **working groups** would also help

  "And maybe that's a barrier itself is people haven't gotten to know each other and large zoom calls are a very challenging way to do that. Connecting in smaller groups is always beneficial"

- Potential for an **in-person retreat**

  "And you know, one in person get together can lead to a handful of side conversations that make you know someone that much better whether it's waiting in line for the bathroom and just saying hello"

6. Establish information sharing protocols

Some members expressed concern about the Collaborative not seeming to have information protocols to ensure non-extractive, non-competitive practices and to protect community data.

Discussion: What form could these protocols take?

7. Formalize Decision-Making & Operating Agreements

- **Decision-making processes** - **Consensus? Voting?**

- **Agreements and norms around** - **conflict resolution, restorative justice, non-violent direct communication, confidentiality & transparency,** should be established.

- **Organizational autonomy** - members must sign on to the purpose statement, values and principles, but have the **option to participate, support, or endorse any specific project** put forth by EERC.

- **Establishing equitable representation goals** - especially when it comes to **leadership roles** in the Collaborative.

8. Funding

Discussion:
- What types of foundations or donors could be interested in funding the work of the EERC? (e.g. Climate Funders Justice Pledge)
- What type of funding would benefit the EERC (participation stipends, research funding, etc.)?
- Which EERC member org(s) could be the fiduciary for this funding?

9. Capacity-Building

The EERC should consider
- Hiring a facilitator
- New group(s) of student interns
  - Clearly define the scope of work so that the partnership can be mutually beneficial
  - Which other universities could be interested in building a partnership with the EERC?

Thank you

Thank you so much for allowing us to work with you all this year and thank you to all those who helped us along the way!

EERC ADDITIONAL RECOMMENDATIONS

Prepared by Cat Diggs, Tara Grebe, Phong Hong
Advised by, Will Bryan, Bobuchi Ken-Opurum, Justin Schott

ADDITIONAL RECOMMENDATIONS

A. Purpose and scope of work recommendations

1. More clearly defining the problem that the Collab is responding to

    a. The EERC should consider revisiting the reason why it came together in the first place.

        i. What problem is it responding to? What is the scope of this problem?

        ii. What key research reports might it align with to respond to the problem is it responding to?

        iii. We felt that the video [The Climate Justice Movement has a big problem](#) produced by the Climate Funders Justice Pledge (CFJP) defined the scope of their problem in a very clear and engaging way.

    b. As we understand it, the EERC came together to create more collaboration around the development of Energy Equity metrics, especially as it relates to the allocation of Justice40 funds to EJ communities across the nation to support a just transition toward a clean energy future.

        i. Is this still the case?

        ii. Could this purpose be refined in a way that is accessible and engaging to a broader audience? And to front and fenceline communities?

        iii. Has the passing of the Inflation Reduction Act changed the scope of the problem that the EERC is trying to respond to?

        iv. How can the EERC more clearly define the way in which its work would provide an added value to work that is already taking place in the energy equity and justice space?

    c. Would the EERC want to consider turning these agreed upon purposes into a mission and vision statement that is more public facing and that could eventually be published on an online platform? For a possible example, see [Appendix B](#)

2. Find alignment around key definitions

    a. The EERC should work together to find alignment on definitions of key concepts in the energy equity space, such as energy equity, energy poverty, energy burdens, energy justice, just transitions, etc.

    b. As an example, the University of Michigan's [Energy Equity Project](#) defines Energy Equity in the following way:

        i. *"Energy equity recognizes the historical and cumulative burdens of the energy system borne by frontline and low-income communities. To eliminate these disparities, energy equity centers the voices of frontline communities in energy planning and decision making and ensures the fair distribution of clean energy benefits and ownership."*

    c. What other examples exist out there? How can Collab members ground themselves in a shared understanding of key concepts and terms in the energy equity space?

3. **Refining the EERC's Scope of Work**

    a. A strong theme derived from the research we carried out is that the 5 coalitions referred to in Section III-A all share a clear, actionable solution to an identified problem within the energy equity or racial justice space.

        i. For example, NY Renews was founded on the purpose of passing the Climate Leadership and Community Investment Act. The organization's initial activities centered around this sole mission.

        ii. For Race Justice, they push for racial justice through three distinct activities: research, media and practice.

    b. The EERC can be characterized through its action-driven solutions. *How* exactly does the EERC contribute to energy equity research? What type of research practices does the EERC want to leverage for energy equity to be actionable within marginalized communities? Given that the EERC is an envisioned space for collaboration among researchers and practitioners, does it want to primarily focus on research analysis, funding advocacy, translation research, or other types of activities?

B. Tool-Building Recommendations

During interviews, EERC members identified different types of tools that would be useful to the further development of the Collab and its member organizations.

1. **Communications tools**
    a. Newsletter with updates and summaries of the work that other members are doing - would help avoid overlap for grant application processes.
    b. Providing more summarized and distilled versions of work being accomplished to community, policy and industry audiences to increase accessibility of the information.
    c. Social media dissemination is always helpful.
    d. Development of an EERC website.
    e. Google folder (something low tech) for sharing and exchanging information to begin with.

2. **Research-based resources**
    a. One of the main goals mentioned by many members in the interviews was to establish a resource hub for policy and research centering around the topic of energy equity.
    b. Should the EERC want to go down this route they should look to the [NEWHAB Climate Funding Toolkit](#) as a guide. This toolkit not only shares funding resources – which would be helpful to accomplish the recommendations set out within the Funding section – but it is also a springboard for information sharing. The website also includes member profiles, which might be applicable to the EERC as well.
        i. Development of quantitative measures for energy equity potentially in the form of a White Paper.
        ii. Development of an ecosystem analysis of who is doing what
    c. Another goal mentioned by members is to develop metrics. As the EERC continues to evolve and grow three things must happen to promote the development of metrics: 1) interest should be gauged and that group should define what metrics are within the context of the EERC. 2) Steps must be taken to plan out such a process, and 3) working groups should be established to create these metrics.

3. **Collaboration-facilitations**
    a. Start using project development and management software
    b. Open source information sharing ex. appropedia.org and energypedia.info.
    c. Compiling policies that states, cities, regions are working on.

d. Research partnership developments.

4. **Energy equity language**
    a. Developed consensus over the use of energy equity language and how/when to use it.
    b. List of EE terms to refer to.

5. **Key considerations for tool development**
    a. Tool development might be a key governance item for the EERC to consider particularly if these resources will be made public. Funding mechanisms will be especially pertinent to this endeavor.
    b.   It is also important to acknowledge that some members expressed that the EERC should hold off building out too many tools before the Collab is further established in its mission and goals and members demonstrate commitment to the work of the EERC.

EERC GOVERNANCE PROPOSAL APPENDICES

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APPENDIX A - MORE ABOUT THE DOW SUSTAINABILITY FELLOWSHIP

1. What is the Dow Sustainability Fellowship?

The purpose of this fellowship is to provide graduate students with tuition funding and an opportunity to work on multidisciplinary student teams that tackle issues across a wide range of topics in the realm of sustainability. More information can be found on the following website https://graham.umich.edu/dow.

2. Who are the fellows and why did they join the EERC's efforts?

This specific team of 6 students partnering with the EERC as their project client represented a range of disciplines: public policy, urban planning, environmental justice, environmental policy, architecture, and epidemiology. You can learn more about the fellows here. Their goal was to support the Collaborative's development of internal processes and infrastructure so that it could form a cohesive coalition that can facilitate easier public access to energy equity metrics and data. As many of them were new to the energy equity field, the team spent the beginning of 2022 learning as much as they could about the field and making a plan to support the establishment of the EERC. Their faculty advisor was Justin Schott from the U-M Energy Equity Project and their client liaison was Jacquie Moss, formerly at the Texas Energy Poverty Research Institute.

3. Their initial efforts

To do so, they began by conducting one-on-one stakeholder interviews with 20 of the 30 Collaborative members to identify their shared needs, visions, and aspirations for the network. Some members declined interview invitations because they had plans to leave the Collaborative or another member from their organization had already agreed to be interviewed. During each 30-45 minute interview, they posed 12 standardized questions. They transcribed and analyzed interview responses and then synthesized and presented their findings to the EERC at their June 2022 meeting. They prepared a two-page **Executive summary** of this analysis for the Collaborative. Based on their findings, they recommended the EERC should establish the following: 1) an organizational framework and leadership structure built on trust; 2) detailed rules that allow members to share resources and thoughts with a clear understanding of how others might use them; and 3) a clear pathway for future engagement and partnerships with BIPOC / frontline communities.

4. What's next?

Following the member interview process and presentation to the EERC in June of 2022, the Dow Fellows team came together to rethink the scope of their work,

given that they knew that their fellowship was coming to a close at the end of November 2022. Through the interview process, the Dow fellows team, their academic advisor, and project liaison recognized a need for offering a stronger sense of directionality to the Collaborative, which is still in the formative and informal stages, by re-elevating its mission and values, by providing possible avenues for a governance structure, as well as by putting together an Energy Equity & Justice (EEJ) Network Database prototype.

One of the Dow Fellows' team final deliverables was to co-design a governance proposal for the EERC to respond to and refine during future meetings. At the current stage of the EERC the focus of this proposal will be on building a community joined by shared values and motivated to disrupt disparities in the energy system.

APPENDIX B - IMPETUS BEHIND THE CREATION OF THIS PROPOSAL

1. Membership desire to solidify the EERC's mission and vision

Based on membership interviews, members have expressed a need for solidifying the EERC's mission and vision to help define the Collaborative's direction. Centering Black Indigenous and People of Color (BIPOC) and frontline community voices is a priority among Collaborative members, and meaningful engagement and involvement of those voices requires a mission that clearly signals shared values of equity and justice among members. In a space that emphasizes internal collaboration between members, an interviewee begged the following question about the meaning of working in Collaborative setting: "Does it mean open space for thought partnership or does it mean that we have agreed and are working towards shared goals where we each have our responsibilities?"

2. Membership desire to solidify the EERC's governance structure

During interviews, EERC members have prioritized establishing a governance system as a need to achieve short-term success as a Collaborative. Having a solidified governance system is necessary for members to be able to fully assess their level of commitment, take ownership of projects and initiatives, as well as determine whether the EERC is the right space for them. As the EERC attempts to solidify its governance structure, it is equally important for it to recognize that many members have expressed that BIPOC and frontline communities should play a central role in refining and consolidating this governance structure. At the same

time, the Collaborative needs to do more work to establish itself before bringing very active and often under-funded BIPOC and frontline entities into the fold.

3. Membership desire to solidify the EERC's research ethic

The EERC also needs to clarify its research principles, in order to build meaningful partnerships with BIPOC and frontline communities. An interviewee put forth the idea of having the EERC center BIPOC lived experiences and expertise as a way to define research agendas instead of engaging in traditional top-down approaches to developing in research. Members have also expressed an interest in creating an inclusive research space that enables engagement with non-traditional research institutions such as community-based organizations. Another member stated that the EERC will have been successful long-term if, "the culture around collaboratively producing research that speaks from the frontlines of climate injustice has shifted to be explicitly anti-fascist and has moved past failed neoliberal ideas of what change looks like." As the EERC aims to build meaningful partnerships with BIPOC and frontline communities, it is crucial for it to recognize that if federal funding is involved, such programs may not always be attuned to the needs of the communities they aim to serve.

APPENDIX C - A MISSION STATEMENT EXAMPLE

The Energy Equity Researchers Collaborative (EERC) strives to hold creative space to generate ideas and explore solutions for contributing to an energy just present and future. To do so the ERRC seeks to, on the one hand, invest time and resources in BIPOC, frontline, and vulnerable communities, who are at the forefront of the climate crisis and of solution-making efforts to address it. On the other hand, the Collaborative's purpose is to amplify the conversation about the need for energy equity metrics and research.

APPENDIX D - EERC DRAFT PRINCIPLES

Sourced from February Collab meeting notes
- EERC members seek to collectively build long-term reciprocal relationships with BIPOC and frontline communities, in order to develop research endeavors and agendas that respond directly to their needs, visions and aspirations.

- The EERC seeks for its membership to be strongly represented by BIPOC and frontline communities in the energy and climate justice space. It also seeks to train its other members on a theory of change that is rooted in a vision of anti-racism and collective liberation.
- The EERC will produce rigorous, data-driven energy equity research for the benefit and use of BIPOC and frontline communities in their advocacy efforts, as well as for public officials and businesses in their energy equity decision-making and project development efforts.
- The EERC will ensure that its processes of generating research are transparent and non-extractive in that the development of its research will be done in concert with impacted communities rather than at their expense.
- The EERC will also be sure to implement information and research sharing protocols which protect the work and knowledge that is being shared by its membership, and especially data of frontline communities, from co-optation, plagiarism, and distortion.

APPENDIX E - MORE ABOUT THE JEMEZ PRINCIPLES AND THE EJ PRINCIPLES

This appendix briefly summarizes these principles and lays out recommendations on how to expand upon them, in order to apply them to the realm of energy equity research.

1. **Jemez Principles of Democratic Organizing**

   The Jemez principles are a vital framework for the EERC to follow moving forward particularly as the collaborative seeks to center BIPOC and frontline community voices in its work. These principles were created by a coalition of People of Color and its allies at an event hosted by the Southwest Network for Environmental and Economic Justice back in 1996. It has become a basis for environmental justice (EJ) organizing since. The guidelines express how EJ initiatives can work within and outside of our societal boundaries to promote a more inclusive and just world through bottom- up organizing. Such forms of organizing involve lifting up marginalized voices and working from a basis of solidarity and mutual respect. Below are the 6 categories of democratic organizing, which were laid out by the coalition in the principles they redacted:
   - Be Inclusive
   - Emphasize Bottom Up Organizing
   - Let People Speak for Themselves
   - Work Together in Solidarity and Mutuality
   - Build Just Relationships Among Ourselves
   - Commit to Self-Transformation

2. **The 17 Principles of Environmental Justice**

While all of these principles are foundational to the EJ movement, the most pertinent principles for the EERC's to consider when refining its research ethic are the following:
"Environmental Justice....
- Demands that public policy be based on mutual respect and justice for all peoples, free from any form of discrimination or bias.
- Mandates the right to ethical, balanced and responsible uses of land and renewable resources in the interest of a sustainable planet for humans and other living things.
- Affirms the fundamental right to political, economic, cultural and environmental self-determination of all peoples.
- Demands the right to participate as equal partners at every level of decision-making, including needs assessment, planning, implementation, enforcement and evaluation.
- Protects the right of victims of environmental injustice to receive full compensation and reparations for damages as well as quality health care.
- Considers governmental acts of environmental injustice a violation of international law, the Universal Declaration On Human Rights, and the United Nations Convention on Genocide.
- Must recognize a special legal and natural relationship of Native Peoples to the U.S. government through treaties, agreements, compacts, and covenants affirming sovereignty and self-determination.
- Affirms the need for urban and rural ecological policies to clean up and rebuild our cities and rural areas in balance with nature, honoring the cultural integrity of all our communities, and providing fair access for all to the full range of resources.
- Calls for the strict enforcement of principles of informed consent, and a halt to the testing of experimental reproductive and medical procedures and vaccinations on people of color.
- Calls for the education of present and future generations which emphasizes social and environmental issues, based on our experience and an appreciation of our diverse cultural perspectives."

APPENDIX F - COALITION RESEARCH FACTSHEET

NY Renews
- **Description:** A coalition of over 300 environmental, justice, faith, labor and community groups. They have fought to pass the Climate Leadership and Community Protection Act (CLCPA) in New York and are working towards a Climate and Community Investment Act, which reinvest $15 billion each year from

corporate polluters in building jobs and a renewable economy in the State of New York.
- **Programs:**
  - CLCPA: 100% zero-emission electricity by 2040, sets legally binding emissions reduction standards to get New York completely off of fossil fuels by 2050, and mandates that 40% of state climate and energy funding be invested in disproportionately disadvantaged communities.
  - Climate and Community Investment Act (CCIA) plan includes a polluter penalty that would fund a variety of community-led and owned climate solutions; create good, green jobs and professional training; and support for low- and moderate-income New Yorkers who will be impacted by the energy transition.
  - $15 billion budget demand for climate justice in the New York State 2022-2023 budget;
  - They also generated the following documents: False Solutions Report; The Climate and Community Investment Act: Job Reports; organizing toolkit.
- **Funding:** A central function of the NY Renews coalition is to provide support for coalition members' projects and priorities. They build movement power and coalition member capacity in a variety of ways, including popular education, training, toolkits, and more. They distribute upwards of 50% of the revenue we raise through regrants to steering committee and coalition members: NY Renews Project Fund ($1,000-$5,000) for engagement and organizing efforts; and Capacity Building Fund ($5,000-$20,000) for capacity building.
- **Memberships:** The coalition members of NY Renews are from across the state and across constituencies. Labor unions, community groups, environmental organizations, faith communities, environmental justice advocates. Membership form.
- **Governance:** A Coalition coordinator, development lead, campaigns coordinator, coalition administrator, digital organizer, policy coordinator, communication coordinator, coalition organizer and staff supervisor work together to lead the work of NY Renews.
- **Anything that stood out:** Their mission is centered around passing the CLCPA. After fighting to pass the act, they started building upon their coalition work around just transition and advocating for the CCIA. Their membership outlines 9 points of unity (principles, values and goals). The EERC could consider refining the scope of the EEJ research they want to do.

Race Forward
- **Description:** Founded in 1981, Race Forward a brings systemic analysis and an innovative approach to complex race issues to help people take effective action toward racial equity. Race Forward is home to the Government Alliance on Race and Equity (GARE), a national network of local governments working to achieve racial equity and to advance opportunities for all.
- **Programs:** Research, media, and practice. Race Forward's Research agenda is built around understanding how race compounds and intersects with other societal

issues (e.g. Energy Democracy Report). Race Forward's primary media product is Colorlines, an award-winning, daily news site. They provide targeted online and in-person training and consulting services in these areas.

- **Funding:** They raised $18.3 million revenue from grants, individual donations, business donations and sponsorships, Created $1million fund for grassroots BIPOC-led organizations in 2021.
- **Memberships:** Developed Government Alliance on Race and Equity (GARE). They have 360+ members and they work to increase member access to GARE's training curriculum.
- **Anything that stood out:** This is an established organization that centers itself on three main activities. The EERC can benefit from refining exactly how it wants to advance energy equity research in communities. Leadership roles can be defined by action-items, such as research, practice, and media.

United Frontline Table
- **Description:** UFT is a collective of 14 frontline organizations that are themselves networks, coalitions, and alliances that work as movement support organizations. They focus on equitable solutions to interlinked crises of economy, climate, and democracy. They aim to provide solutions to frontline communities and also change the popular consciousness around the Just Transition.
- **Programs:**
    - Frontline Green New Deal & Climate and Regenerative Economy Policy Summit.
    - They also Published A People's Orientation to a Regenerative Economy
- **Funding:** This is not mentioned on the website.
- **Memberships:** To quote their "A People's Orientation to a Regenerative Economy", "In the Summer of 2019, Climate Justice Alliance, It Takes Roots, and People's Action brought together 80 leaders from 67 frontline and allied organizations to participate in the Frontline Green New Deal + Climate and Regenerative Economy Summit in Detroit." The website just says that they have plans and criteria for expansion so it seems like maybe they are at a similar place as the EERC but it is unclear whether they have met outside of this summit as a large group.
- **Anything that stood out to you:** One thing the EERC could look at from their "A People's Orientation" report is that they have a working definitions section of topics ranging from Extractive Economy to Just Transition, which the EERC should be working on when it comes to its work. Moreover, groups from the United Frontline Table could be invited to join the EERC.

The Network for Energy, Water, and Health in Affordable Buildings (NEWHAB)
- **Description:** NEWHAB is a network of 8 Philanthropy Serving Organizations (PSO) that is focused on the intersection of climate change, health and equity. It seeks to accelerate investment in this field and provides funding/resources to frontline organizations.
- **Programs:** Their website is a resource hub. Here is a link to their resources page sorted by impact focus. These range from articles and podcasts to factsheets and

additional toolkits. Their climate funding toolkit could be helpful resource to refer to.

- **Funding:** Their projects are funded by several Philanthropy Serving Organizations (PSO's). Linked here is a report about survey results identifying funding gaps, needs and opportunities.
- **Memberships:** Here is a link to their membership page, outside of the PSO's there are many actors like nonprofits and government entities that are also involved.
- **Anything that stood out to you:** This will be a great resource for when the EERC eventually gets to its metrics and policy hub phase.

The Climate Funders Justice Pledge (CFJP)

- **Description:** CFJP is a project from Donors of Color, which is the first-ever cross-racial network composed of donors of colors and movement leaders for racial equity. CFJP challenges leading climate funders to commit to greater public transparency and allocate at least 30% of their climate funding to BIPOC-led, climate justice organizations.
- **Programs:**
  - Web page for taking the pledge.
  - Climate Justice Movement has a big problem informational video
  - FAQ page
- **Funding:** The mission of this network is to change the funding landscape to better support frontline organizations in their fight for climate justice. To quote their website, "Top philanthropies are giving a tiny fraction - just 1.3% - of their U.S. climate dollars to BIPOC-led EJ groups who are doing the most to fight climate change. We call on the top 40 climate funders in the country to take the CFJP and commit to 1) Transparent reporting of their grants, and; 2) Increasing funding of BIPOC-led power building groups to at least 30% within 2 years".
- **Memberships:**
  - List of pledgers
  - Supporters
  - Movement networks - "Below are some of the movement allies who have counseled, advised, and supported the Donors of Color Network in launching the Climate Funders Justice Pledge. They are just a few of the hundreds of justice organizations run by, serving, and building power in communities of color in the fight against climate change"
  - BIPOC Climate + Energy Justice PhDs
- **Anything that stood out to you:** Perhaps the EERC could turn to some of these funders for some dollars as their representation of BIPOC and frontline orgs grows?