



POWER UP BC:

# **Advancing Equity Through Municipal Climate Leadership**



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# Project Background & Research Context

## PROJECT OVERVIEW

The Power Up Communities project was launched in January 2025 to support British Columbian municipalities in **embedding equity into local climate action**. Led by Kambo Energy Group in collaboration with the Cities of Kamloops, Surrey, and Metro Vancouver, and supported by BC Hydro's Sustainable Communities program, this project aims to strengthen local climate action by supporting municipalities to design **equitable and accessible energy programs**. It addresses challenges local governments face in reaching communities most vulnerable to climate impacts, including Indigenous peoples, immigrants, racialized groups, renters, lower-income households, and individuals with disabilities or health challenges. Recognizing the vital role local governments play in climate mitigation and adaptation, the project seeks to strengthen the impact and reach of municipally-led initiatives by exploring tried-and-tested strategies for community engagement with underserved audiences. The project recognizes that while technical and financial barriers can limit participation, barriers to participation can also arise from how programs are communicated and designed. By shifting away from one-size-fits-all approaches, local governments have an opportunity to create more inclusive and effective programs that meet the unique needs of their diverse communities. When programs are shaped by the **lived experiences, values, and priorities** of the communities they aim to serve, they can better address accessibility gaps and foster broader, more meaningful participation in climate solutions.

To support this objective, **six case studies were selected and analyzed** to highlight best practices from across North America. These case studies reflect diverse municipal contexts and showcase transferable learnings and strategies for embedding equity into local climate programs. Case studies were selected to align with priority research areas identified through interviews with municipal staff across the province.

Drawing on insights from municipal interviews and case studies, Kambo developed a set of recommendations to support municipalities in designing climate and energy programs that lower emissions while advancing equity and enhancing the well-being of underserved communities.



## KAMBO INTRODUCTION

Kambo Energy Group is a certified minority-owned and operated social enterprise committed to improving home comfort, safety, and energy efficiency in underserved communities through three in-house programs: Empower Me, Community Power, and the Home Upgrades Program.

Founded in 2009, Kambo was established in response to the lack of participation in utility and government retrofit programs among households with low-to-moderate incomes, diverse multicultural communities, Indigenous communities, and other traditionally underrepresented groups.

For 15 years, Kambo's community-centred approach has supported utilities, governments, and industry partners in increasing participation by embedding equity considerations into energy, climate, and home retrofit initiatives.

## METHODOLOGY AND RESEARCH PROCESS

To inform this project, Kambo conducted interviews with municipal staff from six jurisdictions across British Columbia, representing diverse community contexts including rural, northern, urban, and small municipalities. Interviewees worked across climate action, energy planning, equity, and sustainability roles. **These interviews aimed to understand how municipalities currently engage underserved communities in climate initiatives, exploring effective strategies, challenges, and resource needs for embedding equity into local programs.** Guided by these insights, a systematic review of Canadian and U.S. municipal energy programs with an equity focus was conducted. From an initial pool of ten case studies, six were selected for deeper analysis. The research synthesized cross-cutting themes, replicable actions, and measurable impacts to inform Kambo's recommendations on community engagement and effective strategies to embed equity in decarbonization programs at the municipal level.

## CLIMATE AND EQUITY CONTEXT

The **impacts of the climate crisis are not evenly distributed** and often magnify existing inequalities, disproportionately impacting historically underserved communities across Canada and the United States.<sup>1</sup> These groups often face higher exposure to pollution, limited access to clean and affordable energy, and other intersectional and systemic barriers that result in their being disproportionately impacted by climate change. While these groups have the most to gain from

programs and solutions that mitigate these negative impact, these programs are often unintentionally designed, leading to barriers that hinder underrepresented communities from participating. Yet, within these challenges lies a powerful opportunity to **build more inclusive, resilient, and equitable systems** that can lead the way toward a just and sustainable clean energy future.

Canada and the U.S. have both committed to reaching **net-zero greenhouse gas emissions by 2050**, with Canada codifying this target through the Canadian Net-Zero Emissions Accountability Act.<sup>2</sup> These national commitments underscore the urgent need for a clean energy transition and offer a vital opportunity to **prioritize a just transition that places climate equity at its core.** Local governments are essential in this effort, acting as the closest connection to communities most affected by climate change and energy challenges. Their leadership in embedding equity not only accelerates local decarbonization but also demonstrates progressive solutions that can shape and inspire federal policies and national strategies. By centring equity in local clean energy plans, municipalities can help ensure that the benefits of decarbonization, such as **affordable and reliable power, healthier environments, and new economic opportunities**, reach those who need them most. This community-driven approach lays the foundation for a just, resilient clean energy future that strengthens communities and drives ambitious climate action across all levels of government.

<sup>1</sup> [Energy Insecurity and Black Homeownership. Environmental Justice and Equity in U.S. Climate Laws. WRI ICF report on Indigenous clean energy leadership](#)

<sup>2</sup> [Canada's Net-Zero Accountability Act](#)



We gratefully acknowledge that the research and community engagements that informed this report took place on the traditional and ancestral territory of the x<sup>w</sup>məθk<sup>w</sup>əy<sup>əm</sup> (Musqueam), Skw<sup>x</sup>wú7mesh (Squamish), and səilwətaʔ (Tseil Waututh) peoples, in what is now referred to as Vancouver.

We are grateful to the First Peoples who have stewarded these lands since time immemorial and continue to protect the land, water, and community where we live and work.

# Executive Summary

The Power Up Communities project was launched to support British Columbian municipalities in embedding equity into local climate action. Developed by Kambo Energy Group in partnership with BC Hydro's Sustainable Communities program initiative and the Cities of Kamloops, Surrey, and Metro Vancouver, the project addresses a core challenge facing local governments: **how to design climate solutions that effectively reach and benefit underserved populations.**

This report draws on interviews with municipal staff from six jurisdictions across British Columbia, alongside case studies of municipally-led programs and strategies offering practical, actionable insights for local decision-makers. The case studies span diverse regional contexts across North America and were selected based on priority research areas identified through the municipal interviews. Featured examples include initiatives from Vancouver (BC), Portland (OR), Philadelphia (PA), Seattle (WA), Sanikiluaq (NU), and the

Nova Scotian towns of Mahone Bay, Antigonish, and Berwick. The research identified several key barriers, including limited staff capacity, insufficient equity-focused data, and ongoing challenges in engaging renters, newcomers, lower income households, and other equity-deserving groups. It also highlighted effective strategies, such as aligning programs with community priorities and integrating equity metrics into planning, implementation, and evaluation processes.

Through six detailed case studies, the report highlights how urban centres, small towns, and remote communities are structurally embedding equity into governance models, planning processes, and performance tracking. **By embedding equity into local clean energy planning, municipalities can help ensure that the benefits of decarbonization, such as affordable and reliable energy, healthier environments, and expanded economic opportunities, are accessible to those who need them most.**

## This report includes:

- A clear rationale for integrating equity into local climate and energy initiatives, and examples of this at an institutional level.
- Regional analysis that highlights success factors across varied geographies, populations, and urban and rural contexts.
- Proven strategies for reaching and engaging underserved communities.
- Recommendations related to co-designing programs with communities and strategies for community engagement.
- Equity metrics and evaluation tools to track impact and guide continuous improvement.

Adopting a community-led approach provides municipalities with a strong foundation to build just and resilient clean energy programs. It enhances local trust, improves program effectiveness, and positions municipalities as leaders in driving equitable climate action across all levels of government.

# Municipal Interviews

## OVERVIEW

As part of this project's initial phase, Kambo conducted interviews with municipal staff from six jurisdictions across British Columbia, representing a wide range of community contexts, including rural, northern, urban, and small municipal settings. Interview participants held roles across climate action, energy planning, equity, and sustainability departments.

The purpose of this research was to assess how municipalities are currently engaging underserved communities in climate-related initiatives and understand where common challenges occur.

Discussions explored effective strategies, key challenges, and resource needs related to embedding equity into local climate programming. Insights were synthesized to identify cross-cutting themes, shared barriers, and emerging practices that can inform broader efforts to enhance equitable outcomes in municipal climate planning.

## GUIDING QUESTIONS FOR MUNICIPAL INTERVIEWS

1. What kinds of groups are local government climate action staff trying to or failing to engage with? Do they know who these groups are?
2. What approaches have been used to engage with these groups? What has been successful? What lessons have been learned?
3. What are some of the constraints that they have come up against?
4. What kinds of resources or information would be helpful?
5. What examples of case studies have been heard of that are compelling?
6. How are local governments incorporating equity considerations and engagement of the underserved communities in the project planning and/or budget planning processes? For example, are local governments committing resources (staff time, budget) to supporting the engagement?

## 1. Which Populations Are Municipalities Struggling to Reach?

Local governments reported that several population groups remain underserved or excluded from existing climate programs. These communities encounter persistent structural barriers that limit their ability to access, navigate, or benefit from initiatives such as home energy retrofits, cooling supports, and other climate adaptation measures.

### Commonly Underserved Groups

- **Renters**, especially those living in multi-unit buildings, often lack decision-making authority over building infrastructure.
- **Lower-income households** face significant barriers, including cost barriers, the complexity of application procedures, and limited awareness or understanding of available support mechanisms.
- **Seniors**, particularly those who are isolated or living on fixed incomes, are often missed when relying on traditional outreach.
- **People with disabilities or health conditions** are especially vulnerable to climate impacts like extreme heat, but not consistently engaged.
- **Racialized communities**, immigrants, and newcomers face language and cultural barriers that reduce participation in available programs.
- **Small business owners and landlords** are harder to engage, particularly when incentive structures do not align with their interests.

While municipalities demonstrated a broad recognition of these underserved populations, many reported a lack of granular data needed to design and deliver targeted interventions. They highlighted the need for improved demographic mapping and tools that offer insight into the intersection of climate vulnerability and social inequity.



## 2. What Approaches Have Been Used—and What’s Worked?

Municipalities described the range of outreach strategies they are testing in service of improving equitable access to programs and supports. While not all efforts are fully resourced or sustained, several promising approaches have emerged:

### Engagement Strategies

*“Based on our [municipalities] stats, we’re showing that 60% of our residents don’t necessarily speak English. Or at least have a second language or the first language is not English. So recognizing that alone, I think education would need to reflect the diversity of our community”*

- MUNICIPAL INTERVIEWEE

- **Door-to-door outreach:** Particularly effective in engaging residents of older housing stock and rental units, this method supports direct, personalized contact and increases program visibility.
- **Concierge-style services:** These tailored support models streamline complex processes such as energy retrofits, offering one-on-one guidance to navigate technical and administrative requirements.
- **Public assemblies and community forums:** Inclusive public events foster dialogue and collective input, enabling a broader cross-section of the community to participate in decision-making.
- **Multilingual communication:** Providing materials and translation services in multiple languages helps overcome linguistic barriers and supports culturally responsive engagement.
- **Partnerships with community organizations:** Collaborating with trusted local partners is critical for building trust and accessing hard-to-reach groups.

### What Made These Efforts Effective

- **Sustained outreach:** Ongoing engagement, such as follow-up calls, home visits, or repeated contact, can strengthen relationships and deepen engagement over time.
- **Co-design with community partners:** Involving community-based organizations in the co-design of initiatives ensures programs are culturally relevant, widely accessible, effective, and aligned with local needs.
- **Framing immediate benefits:** Positioning programs in terms of immediate and tangible benefits, such as improved health outcomes, enhanced safety, and reduced utility costs, can broaden appeal and support stronger community uptake than when relying exclusively on climate-related motivations.

### 3. What Barriers Are Municipalities Facing?

Despite an increasing institutional focus on equity, municipalities continue to encounter internal capacity limitations and systemic barriers that constrain the design, implementation, and overall effectiveness of equity-focused climate programs.

#### Key Challenges

“In my work, I think, our biggest barrier to equitable climate programs is a lot of what we have to offer is through the homeowner and excludes the renters”

- Municipal Interviewee

- **Legal constraints** limit the ability to provide direct support to private sector actors such as landlords or small businesses.
- **Split incentives** between landlords and tenants make it difficult to implement building upgrades in rental housing.
- **Staffing and funding limitations** reduce the capacity to develop targeted programming or maintain meaningful community engagement.
- **Equity is often integrated late** in program design, making it more difficult to address barriers in a holistic way.

These barriers mean that even well-intentioned programs may fall short of reaching those who need them most.

*“I think the biggest thing was just ... not having necessarily the staff capacity to be able to really promote those types of [energy] programs that offer electrification. I think because of that, a lot of residents just weren't super familiar with how certain programs worked”*

- MUNICIPAL INTERVIEWEE

## 4. What Supports and Resources Are Needed?

Municipal staff emphasized the need for practical tools, data, and clear guidance to support the proactive integration of equity considerations into program planning and design. There is a shared interest in shifting from reactive, post-implementation adjustments to more intentional, equity-informed approaches embedded at the outset of policy and program development.

### Priority Needs Identified

- **Equity-centered design toolkits:** Step-by-step resources to guide staff through inclusive planning processes, ensuring that equity considerations are embedded from the outset.
- **Data tools:** Platforms that combine demographic and climate vulnerability data to enable more precise targeting of interventions and improved equity impact assessment.
- **Policy framing guidance:** Strategic frameworks that support the design of programs capable of delivering targeted support to underserved populations while maintaining broad community relevance and benefits.
- **Standardized indicators and KPIs:** Clearly defined indicators and performance measures to consistently track, evaluate, and communicate progress toward equity outcomes across municipal initiatives.



## 5. What Examples Are Inspiring Further Action?

Several case studies and initiatives from across North America are influencing local thinking about how to embed equity more effectively:

- **Climate equity indicators** that influence how projects are prioritized.
- **Cooling workshops** and community-based climate adaptation programs.
- **Dedicated equity staff or teams** within climate departments.
- **Models for community-led retrofit programs**, especially those addressing the needs of renters and lower income households.
- **National and international networks** like the Urban Sustainability Directors Network (USDN), which offer shared learning on climate justice integration.

These initiatives are recognized not only for their innovative approaches but also for demonstrating the feasibility and effectiveness of embedding equity into climate action at the local government level.

## 6. How Is Equity Being Embedded in Planning and Budgeting?

The degree to which equity considerations are integrated into municipal planning and budgeting processes varies significantly. While some municipalities have established formal equity commitments and institutional structures, others are in the early stages of capacity building and are adopting a more iterative, learning-based approach.

### Common Approaches

- Incorporating equity principles into strategic plans or council resolutions.
- Creating dedicated staff roles or teams to focus on community engagement and inclusion.
- Funding pilot programs that serve renters, lower income residents, or other equity-deserving groups.
- Using tools like Gender-Based Analysis Plus (GBA+) in long-range planning.

However, in many cases, equity considerations are incorporated as secondary components during later stages of program development, rather than being embedded as foundational elements from the outset.

## 7. Where Is Further Research Needed?

Municipalities highlighted several priority areas where further research and evidence are needed to strengthen program design and inform decision-making.

### 1. Program Framing for Broad Support

Strategies for communicating and structuring equity-focused initiatives in ways that resonate with the broader population and avoid public resistance.

### 2. Legal and Regulatory Workarounds

Innovative legal approaches that allow municipalities to support private property retrofits or rental housing within existing regulations.

### 3. Equity-Driven Data Collection

Methodologies for identifying and mapping vulnerable populations, especially where current datasets are lacking or incomplete.

### 4. Climate Programs for Rural and Northern Contexts

Adaptations to program design that reflect the unique conditions of colder, remote, and sparsely populated regions, including alternatives to conventional electrification.

### 5. Financing for Tenant-Focused Retrofits

Funding structures that address the challenge of split incentives between landlords and tenants and support building upgrades in rental housing.

### 6. Best Practices for Measuring Equity

Identification of effective key performance indicators (KPIs), dashboards, and reporting tools to measure and communicate real progress toward equity goals.

### 7. Cooling and Heat Resilience in Rental Housing

Technical and financial assessments of retrofitting strategies, along with analysis of emerging policy frameworks such as “Right to Cool” legislation.

*“When it comes to equity ... we don’t have an explicit strategy on how to do that right now on how to engage with people in an equitable way”*

- MUNICIPAL INTERVIEWEE

# Case Study Introduction

To ensure the relevance and practicality of the case studies selected, we tied our selection process to the priority research areas identified during the municipality interviews.

## These include:

- Challenges such as framing equity programs for broad public support
- Navigating legal and regulatory barriers
- Collecting equity-focused data
- Designing programs for rural and northern contexts
- Financing tenant-focused retrofits
- Measuring equity outcomes effectively
- Enhancing heat resilience in rental housing

Building on these priorities, the six case studies featured in this report were intentionally selected to illustrate diverse and context-specific approaches to **embedding equity in municipally-led climate initiatives across North America**. Together, they showcase a range of geographic, political, and socio-economic environments, offering valuable insights into how community-led design, bold and transparent equity commitments, and place-based strategies can advance both clean energy and justice outcomes. Each initiative represents best practices in centering an equity lens across various regional contexts, highlighting equity as a foundational design principle within climate and energy programming.



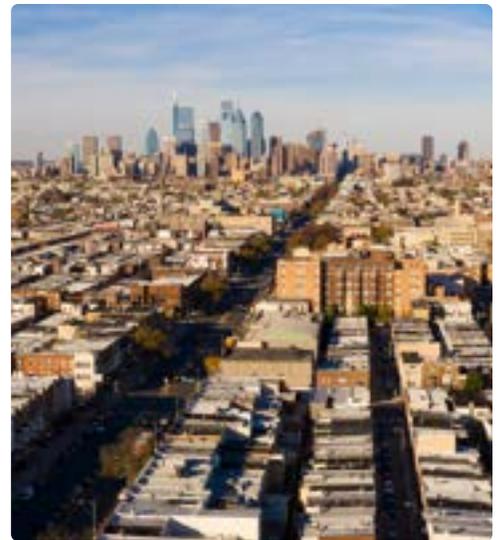
**Vancouver's Equity Framework** exemplifies effective municipal-level equity planning and implementation. By institutionalizing equity across all departments, through tools like equity action plans and the creation of a Chief Equity Officer, the City has built lasting capacity for inclusive decision-making. The framework emphasizes transparent evaluation mechanisms and outlines the importance of committing to equity as an ongoing and imperfect process, rather than simply as an outcome. Anchored in racial justice, reconciliation, and intersectionality, the framework ensures that initiatives are aligned with broader goals of social justice, making it a model for systemic, equity-centred governance. Vancouver's experience affirms the need for internal capacity-building, clear accountability mechanisms, and public transparency in driving equity across all sectors, including energy and sustainability.



The **Portland Clean Energy Community Benefits Fund (PCEF)** stands out as a first-of-its-kind climate justice funding model driven by a voter-approved tax on large retailers, with revenues directly benefiting BIPOC and low-income communities. The program's robust governance structure, guided by a five-year Climate Investment Plan, demonstrates the power of sustainable public financing and community coalitions in operationalizing climate justice at scale. With an exceptional public dashboard to track a variety of equity impact metrics, PCEF exemplifies how equitable funding mechanisms can institutionalize long-term investments in frontline communities, with strong accountability and impact measurement frameworks. This case study showcases adaptability and responsiveness by addressing community feedback and public criticism through Council-approved improvements that accelerated funding and strengthened oversight.

### **Philadelphia's Energy Poverty Alleviation Strategy**

underscores the importance of integrating energy justice into broader housing and urban development efforts. Developed in a city where housing is a top voter concern and households face high energy burdens, the strategy builds on existing local infrastructure and partnerships to deliver immediate improvements in energy affordability and housing conditions, targeting underserved communities and addressing split incentives. It illustrates how cities can drive rapid equity-centered responses by scaling existing programs and prioritizing cross-sector alignment, especially when supported by clear political mandates and community leadership.



**Seattle's Public Charging Program** addresses a critical equity gap in the electric vehicle transition by focusing on renters and neighbourhoods historically excluded from clean transportation infrastructure. The program demonstrates how data-driven targeting, community co-creation, and integration with citywide racial equity initiatives can democratize access to emerging clean technologies. It also shows how cities can respond to spatial and socio-economic barriers in energy infrastructure through inclusive community-focused design.



The **Sanikiluaq Nukkiksautiit Project** in Sanikiluaq, Nunavut, represents a groundbreaking shift in Indigenous-led energy development in remote, diesel-dependent communities in Northern regions. Through Inuit governance, traditional knowledge integration, and sustained advocacy, the project secured a landmark power purchase agreement and community control over energy infrastructure. It is a compelling example of how Indigenous leadership can drive culturally relevant, technically sound, and socially just energy transitions, despite persistent regulatory and structural barriers.

Finally, **Nova Scotia's Alternative Resource Energy Authority (AREA)** highlights the potential for inter-municipal collaboration to contribute to local energy autonomy and equity. By pooling resources across small towns, AREA has enabled the development of renewable energy projects that would otherwise be financially and technically unfeasible for smaller municipalities. The model demonstrates how collective governance, community ownership, and transparent public engagement can deliver equitable energy benefits in rural and resource-constrained contexts.



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Collectively, these case studies showcase **a diverse range of strategies for embedding equity into municipal clean energy initiatives**. Through inclusive funding models, community-led governance, local ownership, and cultural alignment, they illustrate how decarbonization efforts can go beyond emissions reduction to also enhance health, affordability, racial equity, and overall quality of life for communities most affected by energy and climate injustice. By linking clean energy goals with broader social outcomes, these examples demonstrate the potential for climate action to drive systemic change at the local level.



# CASE STUDY

## Equity Framework: Getting Our House In Order

Vancouver, BC, Canada

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*Managed by Vancouver's Equity  
Office and City Council*

### PROJECT OVERVIEW

The City of Vancouver's Equity Framework, launched in 2021, is a city-wide guide to embedding equity into all municipal decision-making and operations. Anchored in Indigenous rights, racial justice, intersectionality, and systems change, the framework is designed to dismantle structural barriers faced by Indigenous, Black, racialized, and other equity-denied communities. It provides shared definitions, tools, and accountability structures for all city departments. Key outcomes include new equity leadership roles, departmental equity action plans, accessibility initiatives, and policies aligned with reconciliation commitments such as UNDRIP.





## REGIONAL CONTEXT & SUCCESS FACTORS

Vancouver's progressive political culture, history of racialized disparities in health and housing, and high demographic diversity (with over 50% of residents identifying as minorities) created the conditions for bold equity reform.<sup>3</sup> As one of the first Canadian cities to establish a Chief Equity Officer and a dedicated Equity Office, Vancouver had the institutional capacity to implement citywide initiatives. Integration with broader city strategies like climate action, poverty reduction, and reconciliation ensured alignment and resource mobilization across departments. The City Council's long-standing focus on justice and inclusion, supported by strong community engagement and data transparency, has helped institutionalize the framework.

<sup>3</sup> Stats Canada source.

# TRANSFERABLE LESSONS

## 01

**Viewing equity as a process, not an outcome** ensures a commitment to implementing equity work continuously, allowing for evolution. This enabled the framework to be adaptive, responsive to feedback, and embedded across multiple city systems that had various levels of existing equity policies, from leadership to public services.

## 02

**Investing in culture change and internal capacity** can shift institutional culture with required leadership training, department-specific strategies, and sustained investment in staff development. Embedding equity into onboarding, job design, and departmental reviews ensures consistent uptake.

## 03

**Using multiple lenses to measure progress** allows for a more nuanced and systems-wide approach to tracking impact. Beyond basic demographic metrics, frameworks are more effective when evaluating equity through justice, compliance and effectiveness perspectives to ensure holistic outcomes.

## 04

**Frameworks should be co-created with communities to ensure they represent lived experience.** Engaging community members, advisory groups, and staff in a participatory model leads to more inclusive policies, greater trust, and better service design.

## 05

**Accessibility plays a major role** in the success of new frameworks. Efforts like the [Language Access Policy](#) make participation easier for those with English language barriers.



## IMPACT METRICS

The success of the Framework, as a living document, can be measured over time and through consistent evaluation of equity across city-led departments. See the [Vancouver open data portal](#) for other indicators used by the City to track equity across departments and internal strategies. The Framework uses three perspectives to measure equity progress:

- **Justice perspective:** Tracks indicators like community health, relationships with Indigenous Nations, policy changes removing barriers, workforce representation, and reported sense of belonging.
- **Effectiveness perspective:** Assesses trust and participation from marginalized groups, success in hiring and retention, innovation, and overall performance.
- **Compliance perspective:** Focuses on the accessibility of internal policies and employee trust in the City.

[VIEW OPEN DATA PORTAL](#)

## KEY SUCCESS METRICS

### Workforce Equity:

- Number of Indigenous and racialized employees in leadership roles
- Inclusion of gender identity data and accommodation policies
- Accessibility improvements in job postings and hiring platforms

### Organizational Culture & Training:

- Number of staff trained in equity, reconciliation, mental health first aid, and trauma-informed practices
- Integration of equity leadership modules into City's LEAP program

### Policy & Service Delivery:

- Department-specific equity action plans implemented across all City departments
- New Language Access Policy with multilingual outreach, safety planning, and plain-language training
- Creation of equity dashboards to track disaggregated data and inform decisions

### Reconciliation & Community Relations:

- Alignment with City's UNDRIP Strategy; partnership protocols signed with Indigenous Nations
- Co-developed strategies such as the Youth Safety and Women's Equity strategies
- Equity reviews embedded into budget processes and procurement reforms



# CASE STUDY

## Portland Clean Energy Community Benefits Fund (PCEF)

Portland, OR, USA

*Managed by Portland's Bureau of Planning and Sustainability*

### PROJECT OVERVIEW

The Portland Clean Energy Community Benefits Fund (PCEF), launched in 2018, is a pioneering climate justice initiative led by the City of Portland's Bureau of Planning and Sustainability. Funded by a 1% [Clean Energy Surcharge](#) on large retailers, PCEF aims to invest in **community-led climate projects that advance racial, economic, and environmental justice**.<sup>4</sup> It supports BIPOC and low-income communities through initiatives such as clean energy upgrades, workforce training, food justice, and climate resilience efforts.

The program is governed by a five-year [Climate Investment Plan \(CIP\)](#), distributing over \$750M between 2023–2028, with \$67M allocated in 2025 alone.<sup>5</sup> Since 2020, they have allocated a total of \$1.6B in climate justice projects and awarded 359 community grants, according to their public [dashboard](#).



<sup>4</sup> A business must [register for a Clean Energy Surcharge account](#) if they report total gross income of \$1 billion or more and Portland gross income of \$500,000 or more on their Business Tax Return.

<sup>5</sup> The [CIP](#), implemented in 2022 and amended in 2024, is a 5-year strategic plan for PCEF's investments. It has clear goals and outcomes for funding streams and was developed according to the PCEF Committee's [guiding principles](#), to ensure projects funded provide both climate and racial, social, or economic justice impacts.



## REGIONAL CONTEXT & SUCCESS FACTORS

Portland's progressive climate policies, equitable tax structure, and strong grassroots nonprofit ecosystem laid a solid foundation for the success of the Portland Clean Energy Community Benefits Fund (PCEF). The city's 2020 Climate Emergency Declaration reinforced a commitment to equity-centered climate action, backed by a history of City Council support for justice-based investments. Approved by nearly 65% of voters, PCEF was **the first initiative of its kind in Oregon, led by a coalition of BIPOC communities.**

The program's emphasis on workforce development, community health, and racial equity, alongside its climate mitigation goals, helped secure broad-based buy-in. Importantly, Portland's progressive tax policies made it possible to place such an initiative on the ballot. The 1% surcharge on large retailers provides a **stable, independent revenue stream**, shielding the program from budget cuts and enabling long-term strategic planning.

# TRANSFERABLE LESSONS

## 01

**Ballot initiatives can drive climate justice** as voter-driven funding mechanisms tend to mobilize public support and secure long-term financing for equity-centred climate projects. This also creates a sense of urgency from grassroots organizations that can clash with the speed of administrative processes.

## 02

**Equity must be structurally embedded** in funding criteria, implementation processes, and partner selection to ensure meaningful outcomes for marginalized communities.

## 03

**Climate funding can be democratized** through community ownership and transparent governance. Investing in local capacity among BIPOC-led organizations is vital to deliver community-informed and culturally relevant projects, and ensures direct lines of communication to priority populations, showcasing that a just transition is achievable when frontline communities lead decision-making and benefit directly from investment.

## 04

**It is essential to build mechanisms for community engagement, learning, and oversight** to ensure long-term effectiveness and accountability. As funding expanded, PCEF's ability to adapt and introduce new evaluation tools in response to public feedback and a City Audit allowed them to scale the program.<sup>6</sup>

## 05

**Well-rounded approaches are appealing.** Highlighting cross-sectoral benefits, such as job training, food security, air quality, and housing upgrades, make it easy for people from different backgrounds to see their priorities reflected in the program, despite the program being labelled as a climate justice initiative.



<sup>6</sup> [Audit report.](#)

## IMPACT METRICS

PCEF employs a comprehensive metrics framework to monitor equity, climate, and workforce outcomes, with metrics tailored to each grantee's project. All metrics are tracked on the public [dashboard](#), which employs a comprehensive evaluation framework tailored to each project, tracking:

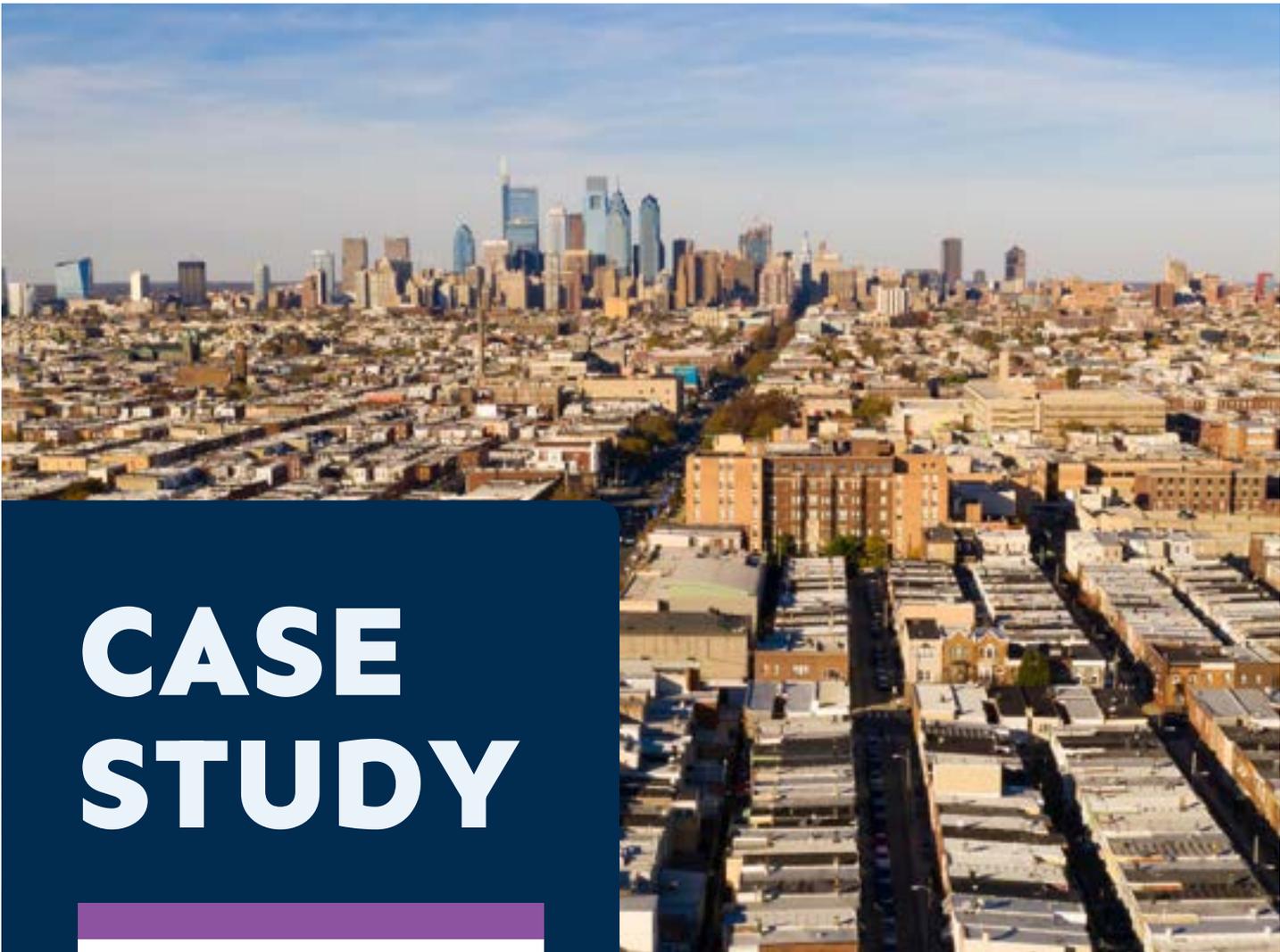
[VIEW PUBLIC DASHBOARD](#)



## KEY SUCCESS METRICS

PCEF uses a comprehensive evaluation framework tailored to each project, tracking:

- **Demographic Reach:** Number of priority populations served and % of priority populations served (BIPOC, low-income, women, immigrants, etc.)
- **Greenhouse Gas Reductions:** Estimated and actual GHG emissions avoided
- **Workforce Participation:** Hours worked by women and POC (apprentice and journey-level)
- **Contracting Equity:** Share of contract dollars to COBID-certified businesses
- **Community Outcomes:** Affordable housing units upgraded, green infrastructure installed, people served through food justice/resilience
- **Capacity Building:** Strengthening of BIPOC-led organizations to lead and manage climate solutions



# CASE STUDY

## Energy Poverty Alleviation Strategy

Philadelphia, PA, USA

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*Managed by the City of Philadelphia's Office of Sustainability with implementation support from the Philadelphia Energy Authority*

## PROJECT OVERVIEW

Led by Philadelphia's Office of Sustainability and supported by the Philadelphia Energy Authority, the Energy Poverty Alleviation Strategy is a five-year, community-informed roadmap to address energy insecurity. Developed under Mayor Cherelle Parker's administration in 2023, the strategy prioritizes communities most impacted by high energy burdens: BIPOC and low-income residents. It seeks to improve affordability, reduce emissions, and ensure vulnerable communities benefit from the energy transition through building upgrades and clean energy access.



City of  
**Philadelphia**



## REGIONAL CONTEXT & SUCCESS FACTORS

Philadelphia faces one of the highest energy burdens in the U.S., with systemic disinvestment, aging housing, and racial inequities driving disproportionately high utility costs in BIPOC and low-income communities.<sup>7</sup> Further, a quarter of low-income households in the Philadelphia metropolitan area have an energy burden exceeding 19%, which is nearly six times higher than the median energy burden. Nearly 70% of city emissions come from buildings and industry.<sup>8</sup> The City's leadership created political will and alignment, particularly Mayor Parker's \$2B housing overhaul and 100-Day Action Plan prioritizing equity and clean energy. Expanding the capacity of existing programs instead of creating new ones allowed for a more immediate and effective response to residents' needs by reducing waitlists and ensuring timely access to resources. This approach was successful because it leveraged the leadership of existing BIPOC community-led organizations. By prioritizing energy equity alongside housing reform, the strategy directly addressed the intersection of high energy costs and inadequate housing, creating long-term benefits for residents as it relates to living conditions and utility costs.

<sup>7</sup> [American Council for an Energy Efficient Economy \(2020\): Breakdown of energy burden in Philadelphia:](#)

<sup>8</sup> [City of Philadelphia GHG Numbers: GHG Inventory](#)

# TRANSFERABLE LESSONS

## 01

**Integrating energy upgrades into housing development** plans unlocks additional funding, scales programs, and boosts public engagement by linking housing improvements to climate solutions. Aligning energy equity with housing reform addresses residents' needs while tackling systemic inequality and creating cross-sector collaboration opportunities.

## 02

**Budgets must reflect commitments** to recognizing and addressing systemic racism in the current energy system. This requires dedicating resources (capacity and funding) and [intentionally budgeting for this work](#) so it becomes institutionalized and mitigates disparities in the distribution of government funding.

## 03

**Addressing the root causes of high energy burdens** requires tackling systemic inequities and improving overall housing quality, particularly in communities that have faced historic disinvestment. Disinvestment in predominantly BIPOC neighbourhoods, rooted in systemic racism, has led to poor housing conditions, high energy costs, limited access to weatherization, and unstable housing.<sup>9</sup> Centring community perspectives in strategy development and urban plans ensures that solutions reflect lived realities and help rebuild public trust.



<sup>9</sup> Page 7, Energy Poverty Alleviation Strategy

## IMPACT METRICS

The Energy Poverty Alleviation Strategy aligns with Philadelphia's citywide equity and climate action goals by adopting a robust, data-driven approach to track progress. The strategy uses the same equity metrics and tools employed across all municipal departments, anchored by Philadelphia's [Racial Equity Action Plan](#) and visualized through public [dashboards](#).

[VIEW PUBLIC DASHBOARD](#)

## KEY SUCCESS METRICS

### Equity and Access:

- **Demographics:** Participation tracked by gender and race/ethnicity (e.g., Black or African American, Hispanic/Latino/x, Indigenous American, etc.)
- **Resource Access:** Leveraging waitlist data from community energy programs to assess who is accessing (or being excluded from) services
- **Geographic Distribution:** Monitoring benefits by neighborhood to ensure investments reach historically underserved areas

### Climate Equity Indicators:

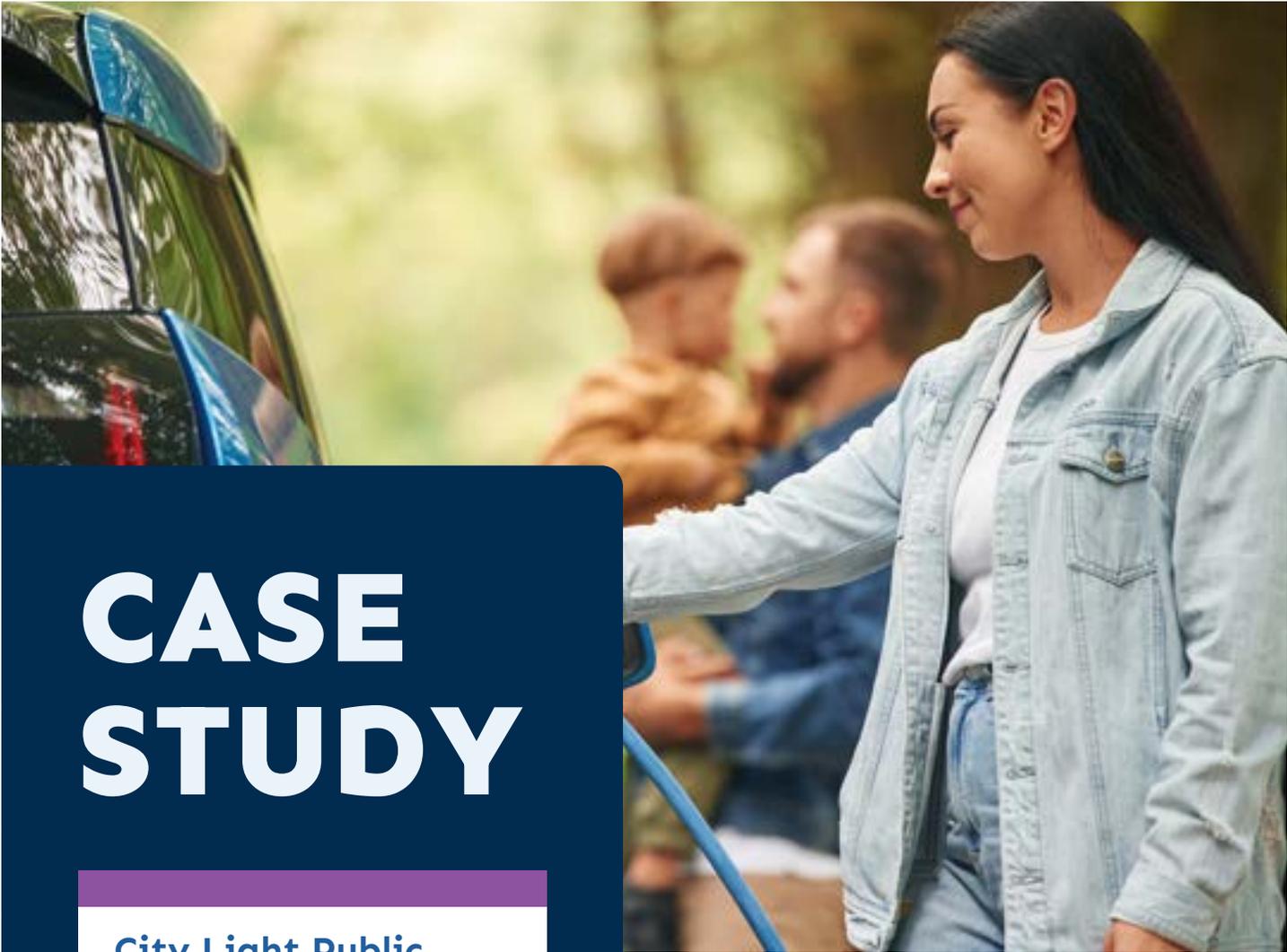
- **Energy Burden:** Core metric assessing the percentage of income households spend on energy, used to prioritize communities most in need
- **Affordability & Health:** Metrics linked to housing quality, utility savings, and home improvements reflect key resident priorities

### Low-Carbon and Emissions Metrics:

- **GHG Reductions:** Emissions tracked in MMBtu via Philadelphia's Municipal Energy Dashboard
- **Building Performance:** Energy and carbon data tracked across 34 municipal buildings through the Building Enhancement Performance Plan

### Social & Economic Outcomes:

- **Workforce Diversity:** Gender, age, race/ethnicity, salary, and hiring data tracked across the municipal workforce
- **Public Health:** The Philadelphia Health Equity Dashboard tracks 16 topics with metrics disaggregated by race and neighborhood



# CASE STUDY

## City Light Public Charging Program: Curbside Level 2 Expansion

Seattle, WA, USA

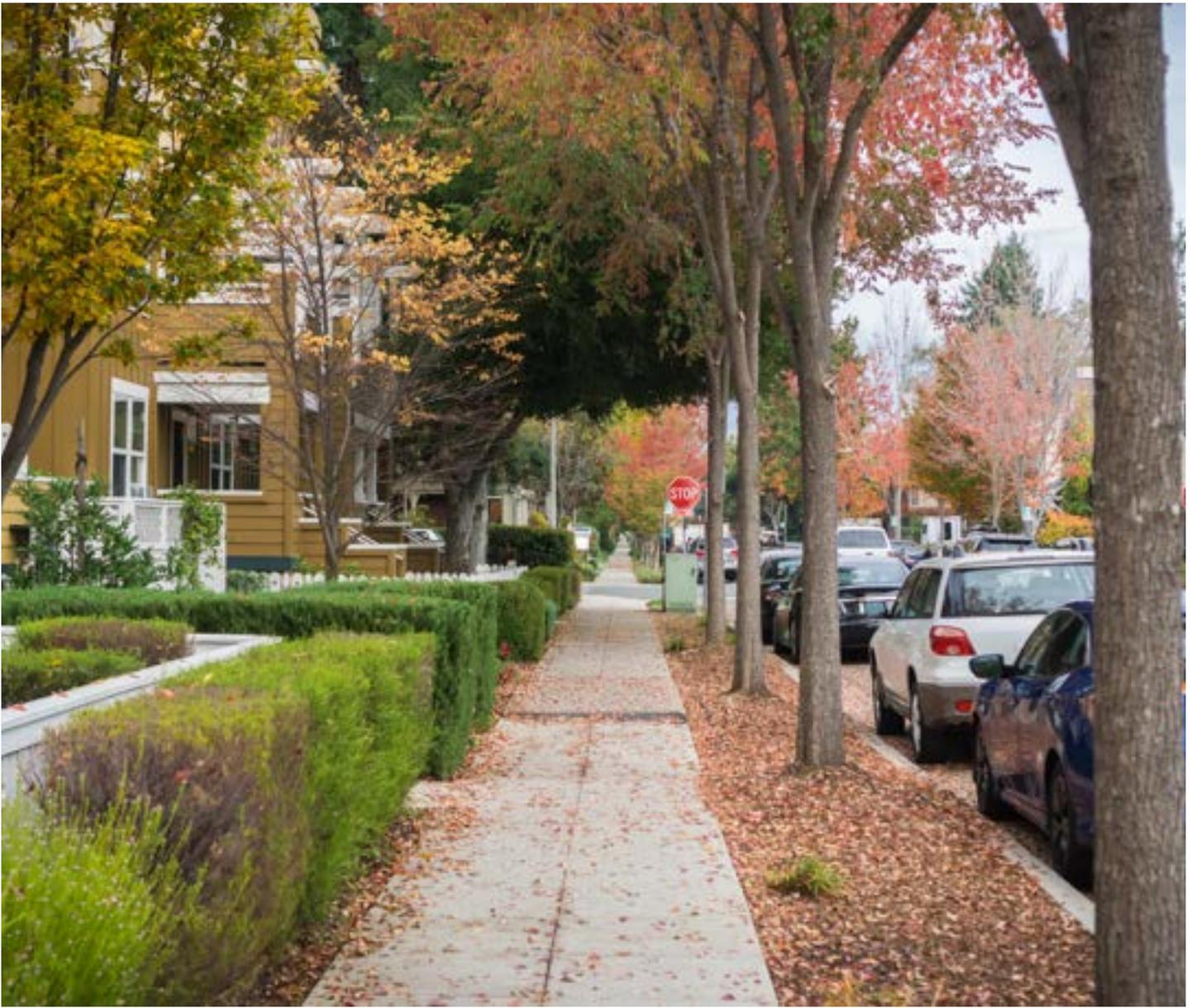
*Seattle City Light*

### PROJECT OVERVIEW

Launched in 2023, the Seattle City Light Public Charging Program aims to expand equitable access to electric vehicle (EV) charging infrastructure by installing 2,000 public Level 2 curbside chargers across Seattle, with a focus on communities historically excluded from clean energy investments. As part of Seattle's broader Transportation Electrification Blueprint, this initiative supports the city's climate goals while addressing barriers to EV adoption for renters and multifamily housing residents, specifically in neighborhoods lacking off-street parking.



**Seattle City Light**



## REGIONAL CONTEXT & SUCCESS FACTORS

Seattle's high urban density, large renter population (53%), and limited private parking in older and low-income neighborhoods made traditional EV charging models inaccessible for many.<sup>10</sup> This program directly addresses that gap. Seattle's strong environmental policy landscape, including a 2050 net-zero target and Washington's 2035 EV mandate, created an enabling policy environment.<sup>11</sup> Public ownership of Seattle City Light allowed for rapid program deployment and alignment with community goals. Importantly, the city's Equity & Environment Initiative and [Racial and Social Equity Composite Index](#) ensured that investments prioritized overburdened communities, particularly in South Seattle neighborhoods like Rainier Valley and Beacon Hill.

<sup>10</sup> [Population, Housing and Employment, Seattle Gov.](#)

<sup>11</sup> Seattle has committed to becoming carbon neutral by 2050, and [Transportation Electrification Blueprint](#) is part of a state target of 100% zero-emission new vehicle sales by 2035. Currently, transportation accounts for [58% of Seattle's core greenhouse gas emissions](#).

# TRANSFERABLE LESSONS

## 01

**Leveraging public utilities** provides the flexibility required to prioritize public benefit over profit, enabling rapid, equity-centered infrastructure expansion aligned with climate targets and broader electrification plans. Collaboration between the utility, transportation department, sustainability office, and local community groups ensured technical feasibility, policy alignment, and social buy-in.

## 02

**Integrating equity-driven tools and collecting disaggregated data** can ensure that resources are distributed fairly, prioritizing underserved communities, particularly those impacted by environmental racism.

## 03

**Infrastructure should be tailored to local housing realities.** Designing curbside charging solutions for residents without garages or driveways addressed a key structural barrier to EV adoption in dense, renter-heavy cities.

## 04

**Start with pilot projects based on community input**, then scale strategically based on community feedback and usage patterns based on monitoring charger utilization rates.

## 05

**Focus on improving air quality and reducing emissions in overburdened neighborhoods** shows how EV access can be tied to public health and climate justice outcomes.



## KEY SUCCESS METRICS:

### Infrastructure Deployment:

- 58 public Level 2 curbside chargers installed across 31 locations (as of August 2024)
- Target to expand charger installation with a focus on Environmental Justice Communities

### Utilization & Access:

- Some locations see up to 6 charging sessions per day based on real time data from ChargePoint
- Chargers deliver electricity equivalent to over 150,000 miles of EV travel annually
- % of chargers located in high-equity-priority zones (tracked via the Equity Index)

### Equity Outcomes:

- Survey data collected from residents in multifamily housing to assess participation and satisfaction
- Data dashboards track usage by location and user demographics

### Climate & Public Health Impact:

- Estimated GHG emissions avoided from mode-switching
- Air quality improvements modeled for frontline neighborhoods
- Supports 90% personal mobility emissions reduction goal by 2030





## REGIONAL CONTEXT & SUCCESS FACTORS

Sanikiluaq's geographic isolation and complete dependence on imported diesel made it an ideal candidate for a community-led clean energy transition. The project succeeded due to strong Inuit governance through NNC, alignment with Inuit Qaujimagatuqangit (traditional knowledge)<sup>15</sup>, and deep community engagement. A legacy of environmental stewardship and the ability to leverage both traditional knowledge and modern technology helped build trust and secure financing. While the federal government has committed to eliminating diesel-powered electricity in remote communities by 2030, energy regulation remains a territorial responsibility. This jurisdictional divide often creates delays and systemic barriers for Indigenous-led projects. Despite early delays in the territorial IPP policy, the project's success in large part is due to NNC's sustained advocacy, which led to the historic agreement with QEC. Partnerships with Indigenous-owned firms, the Government of Nunavut, and, as of June 2025, with the Canadian Infrastructure Bank (CIB), marking CIB's first investment in Nunavut.

<sup>12</sup> NNC is an Inuit-owned entity under the Qikiqtaaluk Corporation

<sup>13</sup> Sanikiluaq is the southernmost community in Nunavut, situated in the Belcher Islands in southeastern Hudson Bay, approximately 150 kilometres (93 miles) off the coast of Québec. It is the only year-round settlement in this vast archipelago, which comprises 1,500 islands spanning 3,000 square kilometres (1,158 square miles).

<sup>14</sup> QEC is wholly owned by the Government of Nunavut and is responsible for generating and distributing electricity to all 25 communities across the territory.

<sup>15</sup> The project incorporates [Inuit Qaujimagatuqangit \(IQ\)](#) principles, such as Inuuqatigiitsiarniq (respecting others), Tunnganarniq (fostering good spirit), and Piliriqatigiinniq (working together), ensuring that the initiative aligns with Inuit societal values and promotes inclusivity.

# TRANSFERABLE LESSONS

## 01

**Policy and utility readiness often lag behind community innovation, and achieving national energy goals requires better coordination between federal commitments and territorial policy frameworks.** Systemic delays, rigid frameworks, and poor communication created avoidable obstacles. NNC's persistence pushed the territorial government to finalize the IPP program, making space for community-led energy generation in line with federal mandates.

## 02

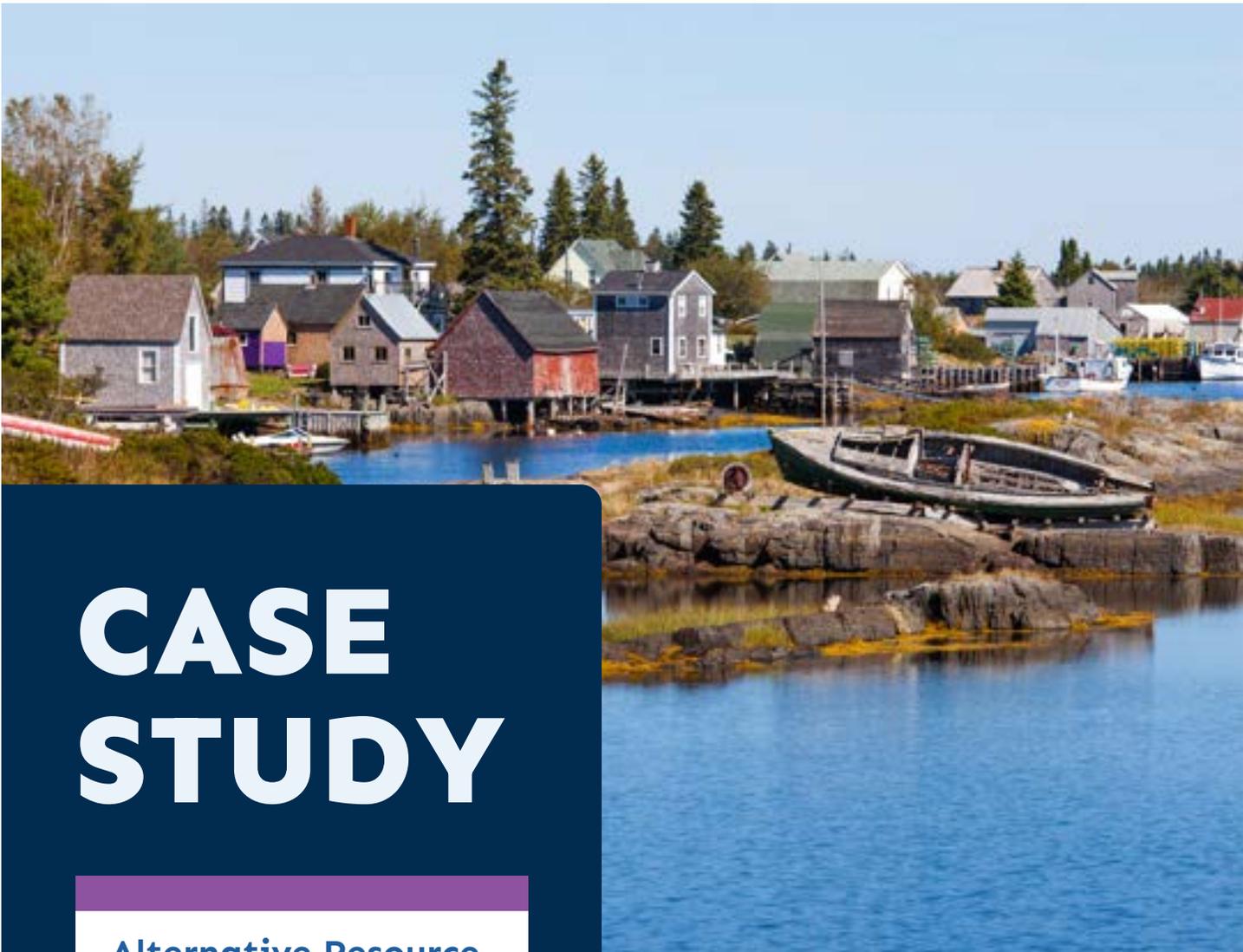
**It's crucial to respect and incorporate local knowledge systems by engaging early** with local and Indigenous communities, aligning project objectives with community needs and fostering trust and buy-in. Hosting in-person education and awareness sessions in areas where new technologies, such as renewable energy, are being introduced can further enhance understanding and acceptance.

## 03

**Empowering communities to track their data** through platforms like SIKU results in more robust data sets from the stewards of the land and provides important equity contexts for analyzing scientific and environmental data. Indigenous knowledge and perspectives are crucial for understanding the full scope of environmental issues. This context fosters a more holistic understanding of scientific and environmental data, ensuring it reflects the realities and needs of all affected communities.

### KEY SUCCESS METRICS

- Diesel reduction and electricity use
- Local employment numbers
- Health benefits related to reduced pollution
- Environmental monitoring, including geotagged observations on the SIKU app
- Affordability
- Participation rates



# CASE STUDY

## Alternative Resource Energy Authority (AREA)

Nova Scotia, Canada

*Inter-municipal Corporation  
(Municipalities of Berwick,  
Antigonish, and Mahone Bay)*

## PROJECT OVERVIEW

The Alternative Resource Energy Authority (AREA) is a municipally-owned clean energy corporation formed in 2014 by the Towns of Berwick, Antigonish, and Mahone Bay, Nova Scotia. It enables small municipalities to jointly own and manage renewable energy infrastructure, improving local energy resilience, reducing GHG emissions, and ensuring economic benefits remain within the community. AREA has since become a model for inter-municipal collaboration, implementing projects like the Ellershouse Wind Farm and the Community Solar Program.

THE TOWN OF ANTIGONISH  TOWN OF berwick

TOWN OF Mahone Bay 

 AREA



## REGIONAL CONTEXT & SUCCESS FACTORS

Nova Scotia's energy system is one of the most coal-dependent in Canada, with many small towns lacking the financial and technical capacity to pursue clean energy independently. AREA succeeded by creating a collaborative governance model that allowed the towns of Berwick, Antigonish, and Mahone Bay to pool resources, share risk, and jointly develop large-scale renewable energy projects. This approach was uniquely effective in Nova Scotia, where a legacy of municipally owned utilities gave towns greater autonomy over energy decisions. Strong local identities and tight-knit communities also enabled high levels of civic engagement, which AREA leveraged through transparent communication, public meetings, and visible community benefits. By aligning its work with provincial climate targets and securing support from federal and provincial funding programs, AREA created a strong policy and financial foundation for its initiatives. Public ownership of infrastructure ensured that revenue stayed within the community, improving affordability and supporting local services. Partnerships with utilities, regulators, and private developers added technical and regulatory expertise, while the focus on cost savings and local control, rather than strictly climate goals, helped build broad and lasting support across the region.

# TRANSFERABLE LESSONS

## 01

**Small towns can overcome capacity limitations** by forming shared governance models. This approach enables rural municipalities to pool resources, share risks, and strengthen collective bargaining power. This regional approach makes utility-scale renewable energy projects feasible.

## 02

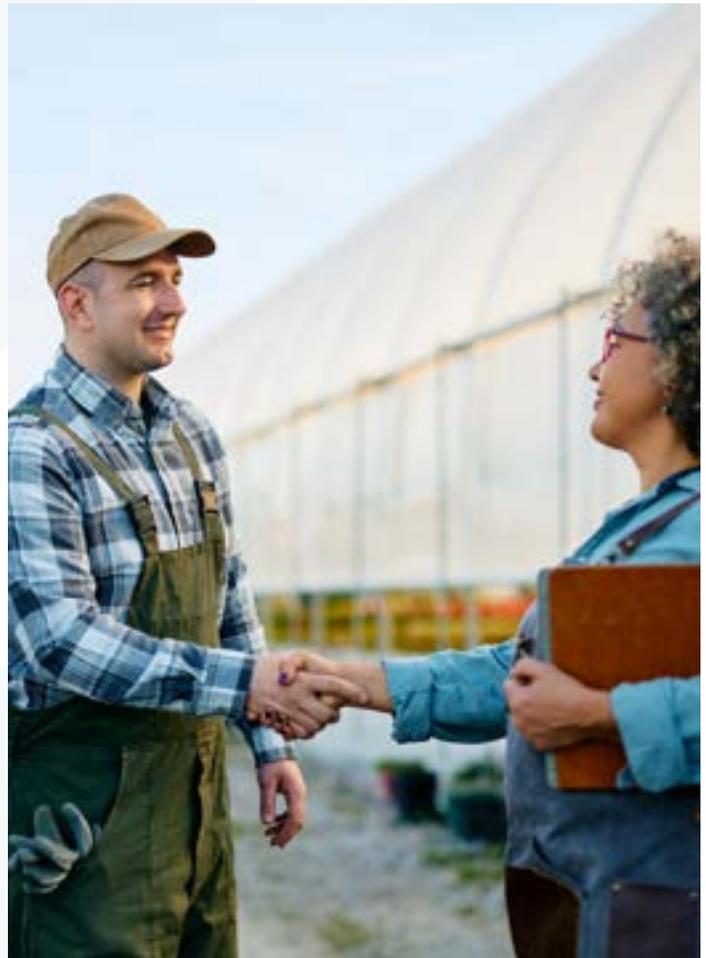
**Retaining public ownership** of utilities and infrastructure gives municipalities control over energy decisions and ensures that economic and environmental benefits remain local.

## 03

**Partnerships broaden expertise and credibility.** Collaborating with renewable energy developer, government regulators, and other entities ensures technical support, policy alignment, and access to diverse funding sources.

## 04

**Focus on affordability** cost savings and local ownership are motivators for community buy-in, rather than emissions reduction as the driving factor is effective for building long-term support and local buy-in in rural communities.



## KEY SUCCESS METRICS

- **GHG Emissions Avoided:** 192,000+ tCO<sub>2</sub>e saved
- **Clean Energy Use:** 84% of electricity sourced from renewables in member towns
- **Jobs Created:** Over 500 total, with 100–150 more expected during Ellershouse III
- **Economic Returns:**
  - \$22M in solar under construction
  - \$51M in total assets
  - \$300K annual profit from solar reinvested in towns
  - \$100K annual wind tax and \$10K donations from wind revenue
- **Homes Powered:** Over 6,500 from Ellershouse Wind Farm alone
- **Electric Vehicles:** 102 EV charging stations funded

# Cross-Cutting Themes & Insights

## EMBEDDING EQUITY AT STRUCTURAL LEVELS

Across all six case studies, a central cross-cutting theme is the importance of **embedding equity as a structural, iterative process**. Whether through Philadelphia's budgeting for racial equity or Vancouver's integration of justice metrics into City systems, successful initiatives did not treat equity as an add-on but built it into the foundation of policies, budgets, and evaluation tools. This required internal capacity-building and intentional shifts in institutional culture, and a prioritization of community leadership and participation. Engaging community-led organizations, leadership training, equity onboarding, and department-specific strategies created consistent uptake across multiple departments, while equity dashboards and public reporting mechanisms ensured accountability and transparency.



## COMMUNITY ENGAGEMENT AND OWNERSHIP

**Community ownership emerged as a critical success factor** across jurisdictions. From the Portland Clean Energy Community Benefits Fund (PCEF), to City Light's Public Charging Program, to the Inuit-led Anuriquak Nukkiqsautiit Project, creating opportunities for communities to lead project design, governance, and delivery was a critical success factor. Moving beyond community engagement, ensuring that outreach was transparent, accessible, and consistent, brought community members and residents into the planning and evaluation process (e.g., Alternative Resource Energy Authority's (AREA) ample public signage and town communication channels, PCEF's flexibility for application support sessions, and Anuriquak's town-halls). This fostered greater trust, cultural alignment, and long-term sustainability. Many programs demonstrated that **participatory design processes, grounded in lived experience** and reinforced through accessible engagement, including language access policies and community workshops, were essential to creating initiatives that genuinely served priority populations.





## FLEXIBILITY, STRATEGIC ADAPTABILITY AND RESPONSIVE PROGRAM DESIGN

Strategic adaptability also played a pivotal role. **Programs experienced more uptake from underserved communities when they were flexible, responded to community feedback and criticism, piloted innovations, and evolved.** Seattle's curbside EV charging initiative, for instance, used real-time utilization data and community feedback to refine its rollout, while PCEF revised its evaluation criteria following a City audit and public consultations. Vancouver's Equity Framework is a great example of **approaching equity as a process, rather than an outcome.** This framing emphasizes a strong commitment to ongoing equity work, creating space for continuous learning and the integration of community feedback. By taking an iterative, learning-oriented approach, programs remain relevant and impactful, leading to increased participation from underserved communities. This approach was particularly impactful when paired with consistent and protected funding streams, such as ballot initiatives and racial equity budgeting processes, that shielded them from political and economic volatility.

## REFRAMING CLIMATE PROGRAMS TO ALIGN WITH COMMUNITY PRIORITIES

Municipal strategies highlighted in this report began by addressing pressing community needs such as affordable housing, access to good jobs, improved transportation, and better public health. By embedding climate considerations into these efforts, the resulting programs delivered climate benefits as part of broader solutions rooted in local priorities. Rather than starting with climate goals and seeking secondary impacts, these case studies show how **centering community well-being can organically produce climate outcomes**, making climate action more relevant, durable, and community driven. This highlights the opportunity for municipalities to lead in addressing the climate crisis and energy insecurity by combining technical solutions with systems change, relational governance, and the equitable redistribution of power, ultimately driving improved socio-economic outcomes for residents.

## LEVERAGING EXISTING INSTITUTIONAL STRENGTHS AND REGIONAL CONTEXTS

Across diverse regional contexts, several key strategies consistently contributed to successful energy equity and climate outcomes. A central driver was the ability of Cities and communities to **leverage existing institutional strengths** and align initiatives with broader policy frameworks, such as Vancouver's integration with reconciliation strategies, Philadelphia's alignment with a \$2B housing overhaul, or Nova Scotia's collaboration among municipally-owned utilities. These synergies allowed for more efficient resource use, reduced duplication of efforts, and faster program uptake. Programs that were built on **pre-existing community trust, policy infrastructure, and governance models** saw higher levels of participation and smoother implementation. However, in regional contexts without precedent for community-owned energy projects, such as the Anuriquiak Nukkiqsautiit Project, persistent advocacy for Inuit governance models that aligned with federal mandates (i.e., eliminate diesel-powered electricity in remote communities by 2023) helped secure a historic Energy Purchase Agreement (EPA) and navigate jurisdictional barriers to community ownership.

Regionally, **progressive political climates in urban centers** like Vancouver, Portland, Seattle, and Philadelphia created fertile ground for equity-centred climate policies, supported by engaged civil societies and strong local leadership. These Cities utilized stable public revenue streams (e.g., Portland's clean energy surcharge) and policy mandates (e.g., Seattle's EV goals) to operationalize long-term strategies. In contrast, rural and remote regions like Sanikiluaq, Nunavut and small towns in Nova Scotia demonstrated that energy sovereignty and local stewardship were more effective entry points than climate framing alone. In these contexts, success hinged on tailoring projects to local governance norms (e.g., Inuit self-determination or small-town inter-municipal ownership), ensuring tangible economic and cultural benefits, and fostering regional partnerships that could overcome jurisdictional and capacity barriers.

**Overall, these regional insights highlight that while equity and community ownership are foundational principles, successfully putting them into practice requires adapting approaches to fit the unique political, economic, and cultural contexts of each community.**

## EMPOWERING LOCAL ORGANIZATIONS AND COMMUNITY PARTNER NETWORKS

Each case study showcases the power of **building cross-sector partnerships** and leveraging the knowledge and networks of existing non-profits and frontline organizations.

**Resourcing community-led organizations** is one of the most impactful strategies for advancing a just energy transition. These groups are already delivering trusted, locally grounded energy solutions, but often face barriers to funding and increasing capacity. With financial and capacity support, they can be well-positioned to expand their reach in communities, meet growing demand, and deepen their impact, building on existing relationships, cultural knowledge, and proven track records of success. This investment not only enhances service delivery but also strengthens relationships between municipalities and communities and builds local workforce pathways, creating sustainable employment opportunities rooted in the community. Programs like the Portland Clean Energy Community Fund show potential of place-based funding models to redirect public resources to frontline organizations, enabling them to scale their proven approaches.

Philadelphia's Energy Poverty Alleviation Strategy also prioritizes support for non-profits that deliver local home retrofits and energy efficiency programs, but have long waitlists and face limited funding and workforce capacity.

**Strengthening networks of organizations leading community-rooted solutions** is a powerful pathway toward an equitable energy future. These organizations are deeply embedded in their communities, with long-standing relationships, cultural insight, and the trust needed to deliver solutions that are relevant, effective, and responsive to local needs, making them ideal partners in driving lasting, inclusive change.



## EQUITY METRICS

The following equity metrics are synthesized from the six case studies and offer a snapshot of how municipalities and community organizations are measuring progress toward equitable, community-led climate outcomes. These metrics reflect environmental and socio-economic indicators, capturing how programs embedded equity across decarbonization efforts, workforce development, affordability, health, and community participation. While not an exhaustive list of all possible equity-related metrics, they serve as practical examples of how equity can be operationalized to measurable equity impacts.

Category	Metrics
<p><b>Decarbonization &amp; Emissions-Related Metrics</b></p> <p><i>Metrics that track environmental impact and climate benefits</i></p>	<ul style="list-style-type: none"> <li>• Number of EV chargers installed, operational uptime, and energy delivered (kWh)</li> <li>• Estimated GHG emissions avoided</li> <li>• Baseline diesel consumption assessment and renewable energy generation capacity (Anuriquak Nukkiksautiit)</li> <li>• Solar and wind capacity under construction, annual energy produced (MWh), GHG emissions reduced (tCO<sub>2</sub>eq)</li> <li>• Contribution to peak load reduction and maintenance performance</li> <li>• GHG emissions reductions (e.g., metric tons of lifetime GHG saved)</li> <li>• Renewable energy generated (e.g., total kWh/MWh installed)</li> <li>• Energy efficiency improvements <ul style="list-style-type: none"> <li>• Number of homes weatherized or retrofitted</li> <li>• Number of homes powered by renewable energy</li> </ul> </li> <li>• Low-carbon impact tracking frameworks (e.g., equity-embedded climate adaptation/mitigation plans)</li> <li>• Green infrastructure implementation (e.g., trees planted, green space created)</li> </ul>
<p><b>Demographic, Equity, and Participation Metrics</b></p> <p><i>Metrics that measure equitable access, community inclusion, and participation</i></p>	<ul style="list-style-type: none"> <li>• Disaggregated demographic data (race/ethnicity, gender identity, Indigenous identity, disability status, income, ability, etc.)</li> <li>• Use of racial and social equity indexes to prioritize resource placement (e.g., City Light's use of Seattle's Racial and Social Equity Composite Index)</li> <li>• Number of community organizations or projects supported/funded</li> <li>• Percentage of program budget allocated to organizations that are owned by underserved communities.</li> <li>• Survey and usage data from renters and multifamily housing residents</li> <li>• Amount of funding budgeted at local/municipal level for racial equity or equity-related initiatives</li> <li>• Community participation rates (e.g., in workshops, programs, planning processes) <ul style="list-style-type: none"> <li>• Community participation in training, monitoring, and decision-making activities, including youth and elders engagement</li> <li>• Public engagement, attendance and feedback from diverse community members</li> <li>• Access to programs by priority populations or marginalized communities</li> </ul> </li> <li>• Number of staff participating in equity-related training</li> <li>• Number of accessibility barriers removed from job postings and City websites</li> </ul>
<p><b>Income and Affordability Metrics</b></p> <p><i>Metrics evaluating who benefits from programs, how equitably benefits are distributed, and economic outcomes</i></p>	<ul style="list-style-type: none"> <li>• Pay equity and living wage data (e.g., wage transparency surveys, jobs paying \$42/hour or more)</li> <li>• Number of living wage jobs created</li> <li>• Employment and contractor support rates (e.g., job placements, contractor hours supported)</li> <li>• Accessibility improvements (e.g., accommodations in job postings, public service access)</li> <li>• Cost per site, maintenance ease, and lessons learned from permitting and installation <ul style="list-style-type: none"> <li>• Utility cost savings and energy savings</li> </ul> </li> <li>• Reduction in electricity costs for residential customers, especially low- and middle-income households</li> <li>• Municipal financial benefits including property tax payments, community benefit payments, and municipal asset ownership</li> <li>• Workforce development <ul style="list-style-type: none"> <li>• Jobs created</li> <li>• Number of people trained</li> <li>• Internal team trainings and upskilling</li> </ul> </li> <li>• Affordability indicator <ul style="list-style-type: none"> <li>• Energy cost savings and energy security improvements</li> <li>• Reductions in energy burden for lower-income households</li> <li>• Electric vehicle savings (i.e., reduced diesel reliance, access to public chargers and more EV uptake)</li> </ul> </li> </ul>
<p><b>Health and Wellbeing Metrics</b></p> <p><i>Metrics assessing social and physical health outcomes of climate and equity initiatives</i></p>	<ul style="list-style-type: none"> <li>• Health benefits such as improved air quality and respiratory outcomes</li> <li>• Health and safety improvements in homes (e.g., post-retrofit indoor air quality)</li> <li>• Improvement to air quality related to GHG emissions</li> <li>• Reported sense of belonging and inclusion</li> <li>• Workplace wellbeing metrics (e.g., work-life integration, flexibility, and benefits)</li> <li>• Mental health and trauma-informed training participation</li> </ul>

## EQUITY AND CLIMATE CONVERGENCE POINTS

This section outlines the key intersections where climate and equity goals overlapped in the case studies. These points illustrate how climate and energy strategies can be designed and implemented to simultaneously address historical inequities, strengthen local capacity, and improve community well-being. Drawing from the transferable lessons across case studies, this synthesis reveals common patterns that emerged despite differing regional contexts and program structures.

- **Energy access in remote and underserved communities:** Deploying clean energy infrastructure (like EV chargers, wind, and solar) in historically underserved or remote communities improves environmental outcomes (e.g., reduced emissions) while increasing equitable access to energy, reducing energy burden, and addressing geographic and racial disparities in infrastructure investment.
  - Percentage of chargers located in equity-priority zones
  - Number of homes powered by renewable energy
  - Reduction in electricity costs for low- and middle-income households
  - Reduction in diesel reliance
- **Affordability and energy security:** Reducing energy costs through clean solutions eases household financial strain while enhancing energy sovereignty, especially for remote, Indigenous, or lower income communities.
  - Energy burden reduction for lower income households)
  - Utility cost savings and energy savings
    - Reduction in electricity costs for residential customers, especially low- and middle-income households
  - Municipal and household-level financial benefits (e.g., community benefit payments, tax revenues)
- **Job creation and inclusive workforce development:** Investments in clean energy generate green jobs but equity metrics ensure these opportunities are accessible, fairly paid, and inclusive. Tracking who gets hired and under what conditions helps align climate investments with broader economic justice goals, especially for racialized and marginalized groups.
  - Number of jobs created
  - Involvement in existing organizations
  - Pay equity and living wage data
  - Workforce development training programs
  - Employment and contractor support rates (e.g., job placements)
- **Improved health outcomes:** Climate action that improves air quality, housing conditions, and social connection can lead to measurable improvements in physical and mental health, particularly in vulnerable populations.
  - Health benefits such as improved air quality and respiratory outcomes
  - Reported sense of belonging and inclusion
  - Mental health and trauma-informed training participation

# A ROADMAP FOR EQUITABLE AND COMMUNITY-LED ENGAGEMENT

## *Building from Fifteen Years of Experience*

The central insight from this project, and from over fifteen years of Kambo's direct work with communities, is clear: meaningfully engaging communities from the outset is essential to designing and delivering climate and energy programs that are equitable, resilient, and impactful. Rather than prescribing specific policies, interventions, or initiatives, this recommendations section provides a framework for meaningful community engagement, uncovering strategies to co-design effective supports with communities they intend to serve. These approaches are intended to move beyond traditional consultation, instead inviting communities into the design, governance, and implementation processes in ways that foster ownership, trust, and long-term success.



## Engage Early and Continuously

Community engagement should begin before a program is designed and continue throughout implementation.

- Hire members of the community or organizations that represent the community to support engagement and communications on behalf of the City.
- Host community roundtables, listening sessions, or focus groups prior to setting program parameters.
- Treat community members as co-designers, not just reviewers.
- Include local voices throughout the project by compensating community members and forming partnerships with trusted local organizations.
- Create transparent governance structures that include diverse community committees.
- Approach equity as a process rather than an outcome, allowing for ongoing feedback loops and the continual refinement of strategies based on what community members experience and express.

### EXAMPLES FROM CASE STUDIES

- Vancouver's Equity Framework was co-created with communities, incorporating input from advisory groups, residents, and City staff in a participatory process. This upfront engagement ensured that the policies reflected lived experiences, fostering greater public trust and resulting in more responsive and effective service design.
- During the creation and implementation of the CIP, PCEF collaborated with local stakeholders and completed a robust community engagement plan and conducted an accessibility and [engagement survey](#) to ensure community members provided input to design the plan and identify the barriers and challenges facing the communities PCEF aimed to serve.
- The Anuriqjuak Nukkiksautiit Project is 100% Inuit-led and grounded in Inuit Qaujimajatuqangit (IQ) (Inuit traditional knowledge) ensuring that all engagement and communication was culturally relevant and rooted in community values. The project's focus on community ownership and involvement ensures local needs and perspectives are central to its development and implementation.

## Design Programs Around Community Values and Priorities

Successful programs are thoughtfully designed to reflect and respond to the real needs and experiences of the people they serve, communicating program benefits in meaningful ways that emphasize health, affordability, and safety.

- Spend time listening to the needs of the community, and approach conversations with a wide lens to uncover how intersectional needs such as housing, workforce, and affordability might be addressed via climate-friendly solutions.
- Collaborate with cultural associations, tenant groups, and frontline service providers who understand community priorities.
- Avoid top-down models; instead, surface community-defined challenges and goals as the foundation for program design.
- Invest directly in BIPOC-led and community-led organizations to deliver culturally relevant projects.
- Collect and leverage disaggregated demographic data to better target priority populations.
- Focus messaging on community priorities, such as cost savings, comfort, and well-being, even if there are multi-solving benefits such as positive climate impacts.
- Clearly tie energy security to health benefits, such as improved air quality and indoor-air quality.
- Avoid overly technical or abstract language; tie programs to tangible quality-of-life improvements.

### EXAMPLES FROM CASE STUDIES

- PCEF was founded and led by communities of colour and low-income communities, positioning frontline voices at the center of climate justice efforts from the outset. This fundamentally shifted power dynamics, ensuring that community needs shaped program objectives.
  - The [PCEF implemented a Reporting and Evaluation Subcommittee](#) to provide community input on the high-level language and metrics to be used publicly and inform program design, tracking impact across all funded projects, and evaluation.
- Vancouver's Equity Framework built in multiple evaluation lenses (justice, compliance, effectiveness) to ensure that community-defined outcomes were used to measure progress.
- Philadelphia's Energy Poverty Alleviation Strategy aligns energy equity with housing reform which is a top concern for residents across the city. Linking climate efforts with improved living conditions, affordability, and safety shifts the narrative away from abstract emissions goals and grounds it in lived experience.

- City Light cited EV chargers based on air quality improvement in overburdened neighbourhoods, showing how infrastructure can support public health.
- The Anuriquak Nukkiksautiit Project maintained momentum despite policy delays, highlighting the importance of community persistence and linking energy outcomes to broader community goals. The primary beneficiaries of the project are the residents of Sanikiluaq, who will experience improved energy security, cost-savings, reduced air pollution, and economic opportunities.
- AREA's emphasis on local control and local economic benefits taps into what matters to residents: affordability, economic security, and environmental health. This framing helped build public support and buy-in for the project.



## Tailor Outreach and Communication Approaches

Meet communities where they are by offering in-language support and accessible programming.

- Use multilingual and plain-language materials. Even households that speak and write an official language are often more trusting and open when groups communicate in their mother tongue.
- Create culturally appropriate opportunities for communities to become informed, such as town hall meetings and open houses, that are designed to be accessible and inclusive.
- Ensure community education is included as part of community engagement to ensure communities have the context and understanding needed to provide feedback. Host education sessions to assess community members understanding new energy developments, and ensure residents are fully aware of new land use.
- Promote through informal communication channels like WhatsApp, TikTok, Facebook groups, or community radio. Individuals from community organizations are often members of these groups and can post on behalf of the City in a trusted way. Leverage existing municipal and local communication channels such as community newsletters, municipal department websites, town halls, and public facing events.
- Prioritize in-person outreach, especially for renters, seniors, and residents of multi-unit housing. Show up in the community consistently and often, and without an agenda.
- Leverage partnerships to help customize messaging and engagement.

### EXAMPLES FROM CASE STUDIES

- Embedding accessibility policies like Vancouver's Language Access Policy to reduce participation barriers for non-English speakers.
- Seattle City Light conducts community workshops that tailor services to neighbourhood needs, especially in renter-heavy, dense areas.
- AREA's strong network of partnerships across its three member towns enabled tailored communication and outreach strategies for different audiences, ensuring local community members, governments, and funders all received messages aligned with their priorities and needs.
- City Light held community meetings to raise awareness, collect feedback, and ensure chargers were trusted by residents.

## Build Capacity for Inclusive, Trauma-Informed Engagement

Staff and systems need to be resourced and equipped to work respectfully, and effectively, with traditionally underserved and marginalized communities.

- Ensure the team leading this work and the community engagement process reflects the diversity of the communities it serves. Without diverse lived experiences within City staff, well-intentioned initiatives risk reinforcing inequities.
- Create dedicated equity roles and budget lines for community engagement. Ensure leadership roles and staff reflect diverse backgrounds and represent marginalized communities. Hiring practices should be reviewed and adapted to support the recruitment and retention of equity-deserving individuals who can meaningfully shape and deliver this work.
- Train all staff in equity, reconciliation, trauma-informed practices, and cultural safety.
- Ensure all materials and engagements are designed with psychological safety and accessibility in mind.
- Use culturally appropriate facilitation methods. Adapt engagement styles to community norms and contexts (e.g., talking circles, language facilitation, culturally appropriate community engagement, land-based engagement, youth-led facilitation).

### EXAMPLES FROM CASE STUDIES

- Vancouver's Equity Framework focuses heavily on internal staff development, requiring departments to embed equity into onboarding, job descriptions, and leadership training.
- PCEF hosts application information sessions to support organizations lacking administrative capacity or experiencing barriers to accessing funding. These are held virtually, and in person, at various times to accommodate a variety of personal and work schedules, and recordings are made available online.
- [Vancouver's Language Access Policy](#) supports accessible participation by requiring plain-language communications and psychological safety measures. It also incorporates adaptive evaluation processes that identify and respond to participation barriers through ongoing community feedback.
- Philadelphia's Office of Sustainability has a resilience team to create a place-based model that promotes community engagement on city-led initiatives.
- During the planning phase of the Anuriquak Nukkiksautiit Project, NNC contracted Firelight Group, a First Nations-owned consulting firm to host educational sessions and meet directly with community members to understand their questions and concerns for new land use.

## Integrate Equity Metrics from the Beginning

What gets measured gets managed, and tracking equity metrics ensures accountability.

- Track participation and benefit distribution by race, income, geography, and housing status. Consider a baseline and develop KPIs to improve participation from groups that are disproportionately under participating.
- Use equity dashboards and disaggregated data to assess performance and guide adjustments.
- Set equity targets, and continuously evaluate progress.
- Build mechanisms for qualitative feedback. Use storytelling, interviews, and community testimonies to supplement quantitative data and capture nuanced impacts.
- Co-design evaluation metrics with communities. Ensure indicators of success reflect what matters to local residents.
- Partner with trusted community-based organizations as engagement leads, directing resources to frontline actors.

### EXAMPLES FROM CASE STUDIES

- Philadelphia's Energy Poverty Alleviation Strategy leverages equity metrics and tools employed across all City departments, anchored by Philadelphia's [Racial Equity Action Plan](#) and visualized through [public dashboards](#) such as the [Racial Equity Strategy Dashboard](#), and [Workforce Diversity Dashboard](#). The Racial Equity Strategy dashboard provides transparency and requires all departments in Philadelphia to create internal racial equity action plans. Before implementing the Energy Poverty Alleviation Strategy, the OOS had already begun progress on this plan.
- Philadelphia has institutionalized a [Budgeting for Racial Equity](#) process to mitigate racial disparities in the distribution of government funding and ensure budgets are intentionally equitable.
- City Light uses Seattle's [Racial and Social Equity Composite Index](#) to identify and prioritize equitable locations for charger deployment. They also track real-time charger utilization rates through ChargePoint to evaluate equity in infrastructure access.

- PCEF has a variety of targets requiring equity metrics tracked on the [public dashboard](#). Across all funding pathways, they seek to increase diversity across the climate contractors and workforce development by committing to the following targets:
  - For contractors, a minimum of 30% of total construction cost must be contracted to businesses certified by the Oregon Certification Office for Business Inclusion and Diversity (COBID).<sup>16</sup>
  - For workforce diversity, PCEF’s targets are that at least 30% of total apprentice hours must be worked by women and 30% must be worked by POC. For journey-level trades, at least 25% of total hours, by trade, must be worked by POC and 10% by women.

## CONCLUSION

# CO-CREATION IS A PATH TO LASTING IMPACT

Kambo’s approach demonstrates that when communities are engaged early and meaningfully, programs are more inclusive, effective, and sustainable. These recommendations offer a practical blueprint for operationalizing that insight, paired with examples from across North America that affirm this kind of engagement is not only possible but transformative.

Investing in community-driven design unlocks deeper participation, fosters collective ownership, and ensures that programs are grounded in what matters most to people, such as health, safety, affordability, and security. Embedding equity from the outset enables municipalities to design programs with communities, rather than for communities. This approach fosters trust, relevance, and long-term impact, grounding solutions in what people value most and delivering shared benefits for all.



<sup>16</sup> Certified as:  
Disadvantaged Business Enterprises (DBE)  
Minority-Owned Business Enterprises (MBE)  
WomanOwned Business Enterprises (WBE), Emerging Small Businesses (ESB)  
Service-Disabled Veteran-Owned Business Enterprises (SDVBE).

# Appendix

# GENERAL TERMS AND GLOSSARY

*The terms and definitions below are sourced from and directly informed by the language, concepts, and themes that emerged throughout the case studies. They are grounded in the terminology used by stakeholders and communities within each context, as well as the framing found across both primary sources and relevant secondary literature. In addition, several definitions reflect terminology commonly used in public-facing documents and guidance from government bodies, such as the Government of Canada's UN Declaration on the Rights of Indigenous Peoples (UNDRIP) Action Plan. They are further supported by the language and frameworks adopted by international and multilateral organizations, including the World Resource Institute and United Nations agencies, which provide globally recognized standards for equity, inclusion, and human rights.*

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**BIPOC (Black, Indigenous, and People of Colour):** An umbrella term that recognizes and highlights the unique and systemic forms of racism experienced by Black and Indigenous communities, while also acknowledging the diverse forms of discrimination faced by all people of colour. The term can be used generally to represent the non-white experience; however, using specific language when referring to racialized groups or experiences is ideal.<sup>1</sup>

**Colonialism:** A system and process by which settlers sought to dominate, displace, and erase Indigenous peoples in order to claim land and resources for their own wealth and power. Colonialism relied on force, manipulation, and ideologies such as white supremacy, racism, and patriarchy to justify the removal of Indigenous peoples and the suppression of their cultures. Across North America, these ideologies remain embedded in modern legal, political, and economic systems, perpetuating systemic injustice and the continued marginalization of Indigenous communities.<sup>2</sup>

**Community-Owned Energy:** A model of energy governance where local municipalities, entities, or community members retain ownership, revenue, and control over energy generation infrastructure, ensuring reinvestment and local accountability.<sup>3</sup>

**Culturally Appropriate:** Ensuring that actions, programs, or materials are aligned with the cultural values, beliefs, and norms of a specific community.

**Culturally Sensitive:** The awareness and acknowledgment of cultural differences and the respectful integration of these differences into practices, policies, and interactions.

**Disaggregated Data:** Data broken down by identity groups (e.g., race, gender, ability) to analyze disparities and guide equity-based decision-making.<sup>4</sup>

**Energy Affordability:** The capacity of households to pay energy bills without sacrificing other basic needs, such as food or healthcare.<sup>5</sup>

<sup>1</sup> [Anti-racism Lexicon, Government of Canada](#)

<sup>2</sup> [Vancouver equity framework, Canadian Encyclopedia](#)

<sup>3</sup> [Energy future labs](#)

<sup>4</sup> [Introduction to GBA Plus, Government of Canada: Breaking Down Data Disaggregation, Government of Canada](#)

<sup>5</sup> [Efficiency Canada Energy Poverty Data Map: User Guide](#)

**Energy Burden:** The percentage of household income spent on energy bills. According to the USA's Department of Energy (DOE), and Efficiency Canada, a high energy burden is often defined as spending more than 6% of income on energy, and households spending above 10% are considered severely burdened.

**Energy Ecosystem:** The network of stakeholders, programs, technologies, and policies involved in producing, distributing, and managing energy services.

**Energy Insecurity:** A condition where households struggle to afford energy services, facing risks such as utility shut-offs, unsafe heating methods, or underheated homes.

**Energy Poverty:** The experience of being unable to afford to comfortably heat or cool your home or power your lights and appliances. Households living in energy poverty allocate a disproportionate amount of their income towards home energy needs. Energy poverty reflects a broader systemic issue referring to the inability to meet basic energy needs due to factors such as income, housing conditions, and utility costs.

**Environmental Justice:** A principle that all people, regardless of race or income, should have equal protection and involvement in environmental policies and benefits.

**Equity-Denied Communities:** Groups historically and currently facing systemic exclusion and discrimination, including Indigenous, Black, racialized, 2SLGBTQ+, disabled, lower income, immigrant, and refugee populations.

**Equity Considerations:** Specific points or factors to think about when addressing equity in a particular context.

**Equity Lens:** A broader, more intentional approach to viewing all decisions, policies, and actions through a framework of equity.

**First Nations:** Refers to the Indigenous peoples in Canada who are neither Métis nor Inuit. First Nations encompass a variety of distinct cultural groups, each with their own languages, traditions, and governance systems.

**Frontline Communities:** Communities that are first and worst impacted by climate change and systemic inequalities, often including BIPOC, lower -income, and marginalized populations.

**Inequity:** Refers to the lack of fairness or justice in the distribution of resources, opportunities, and privileges within a society, often resulting in systemic disadvantages for certain groups based on factors such as race, gender, socioeconomic status, or geographic location.

**Indigenous:** Refers to the original inhabitants of a region or country and their descendants, who maintain a distinct cultural identity and connection to their ancestral lands. In Canada, this includes First Nations, Métis, and Inuit communities.

<sup>5</sup> [Efficiency Canada Energy Poverty Data Map: User Guide](#)

**Inuit:** Refers to the Indigenous people of the Arctic regions of Canada, Greenland, Alaska, and Russia. In Canada, the Inuit primarily inhabit the northern territories and have a distinct culture and history connected to the Arctic environment.

**Just Energy Transition (or Just Transition):** The shift from a fossil fuel-based energy system to a sustainable, low-carbon economy in a way that is fair, inclusive, and equitable for all. It ensures that workers, communities, and marginalized groups are supported through the transition with decent work, reskilling, and shared benefits. Originating in labor movements of the 1980s, the concept now emphasizes that climate action must go hand-in-hand with social justice, leaving no one behind.<sup>6</sup>

**Low-to-moderate incomes:** Households or individuals earning below the median income but not necessarily classified as low-income. These groups often struggle with affordability but may not qualify for certain types of assistance.

**Lower income / Low-income:** In Canada, a family is considered low income if it spends 20 percentage points more on the necessities of food, shelter and clothing than the average family. “Lower income” is a broader term that helps avoid government definitions but still refers to households whose incomes are low and who will benefit from specific support programs.

**Métis:** Refers to a distinct Indigenous group in Canada with mixed First Nations and European ancestry, primarily of French or Scottish descent. Métis people have a unique culture, history, and legal recognition in Canada.

**Racial Equity:** The ongoing and intentional work of identifying and dismantling systemic barriers that produce racial disparities. It involves transforming policies, practices, systems, and structures to create measurable improvements in the lives of people of colour, while ultimately benefiting everyone by fostering a more just and inclusive society.

**Split Incentive:** A challenge in rental housing where landlords must invest in energy upgrades, but tenants receive the utility savings, reducing the incentive for property improvements.

**Tribal Nations:** Refers to sovereign Indigenous groups, particularly in the United States, that have their own governance systems and cultural practices.

**Unceded:** Refers to land that was taken without the free, prior, and informed consent of Indigenous peoples. Unceded land was never surrendered or legally transferred to settlers through treaties or agreements. The term highlights the ongoing occupation of Indigenous territories by colonial powers and affirms Indigenous peoples’ enduring rights and sovereignty over their ancestral lands.<sup>7</sup>

**Underserved Communities:** Groups or areas facing limited access to essential resources and services, often due to factors like poverty, geographic location, or social disparities. This lack of access can impact various aspects of life, including healthcare, education, housing, and overall quality of life.

<sup>6</sup> [UNDP Climate Promise: World Resource Institute](#)

<sup>7</sup> [Vancouver equity framework](#)

**UNDRIP (United Nations Declaration on the Rights of Indigenous Peoples):** Adopted by the United Nations General Assembly in 2007, UNDRIP is a comprehensive international human rights instrument that outlines the minimum standards for the survival, dignity, and well-being of Indigenous peoples worldwide. It affirms the individual and collective rights of Indigenous peoples, including their rights to culture, identity, language, health, education, and self-determination.<sup>8</sup>

<sup>8</sup>[Canada's UNDRIP Action Plan](#)

# CASE STUDY DEEP DIVES

## 1. CASE STUDY OVERVIEW: [EQUITY FRAMEWORK: GETTING OUR HOUSE IN ORDER](#)

- **Location:** Vancouver, BC, Canada
- **Municipality / Department Leading (if applicable):** City of Vancouver (City Council), Equity Office (EO)
- **Project Duration:** 2021-present

## 2. PROJECT BACKGROUND & OBJECTIVES

- **Context & Rationale:** Describe the problem or challenge the project aimed to address. Provide a region-specific analysis to contextualize the issue—why and how is this challenge affecting the particular community or area? Consider including relevant local data, policy gaps, or historical factors that contribute to the problem.
- **Context:**
  - Vancouver’s Equity Framework is the main and foundational set of guidelines to ensure departments across the city are in alignment when it comes to equity work and initiatives. It includes community-facing initiatives, identity-based strategies, and internal initiatives led by various departments all organized within the Framework of [Global Diversity, Equity and Inclusion Benchmarks \(GDEIB\)](#). It aims to amplify ongoing work across departments and fill knowledge gaps. The Arts, Culture and Community Services (ACCS) department reports this work to the Council throughout the year.
  - Central to this Framework is a commitment to complement ongoing actions led by the Indigenous Relations team related to Reconciliation, MMIWG2S, and UNDRIP. These strategies are reported separately to Council. The Framework grounds Indigenous rights and decolonial efforts in a local context, beyond a symbolic land acknowledgment it establishes a foundational commitment to decolonization and reconciliation and checks and balances for progress.
  - One of the City’s nine long-term strategic goals is to increase focus on diversity, equity, social issues, and opportunities. Additionally, one of the City Council’s four priorities is to alleviate barriers to citizen’s well-being such as mental health challenges, addictions, social isolation, poverty and racism. So the Equity Framework aligns with the City’s overall long-term agenda and goals. It is also embedded in the City’s [poverty-reduction plan](#) and health and accessibility strategies.

- **Regional analysis:**
  - In Vancouver and Canada-wide, the broader conversation on equity has expanded and evolved rapidly. Staff are leading internal initiatives and directives, and the number of equity related campaigns and activities are increasing across the workforce and city-led institutions. The framework aims to create a unified vision and common, robust, understanding of equity to ensure there are coordinated efforts to embed it across all departments, with clear definitions and goals to contextualize Vancouver’s work on equity.
  - Vancouver historically has progressive municipal politics and leadership. Climate action efforts, targets, and strategies are among the most ambitious in Canada and are more deeply connected to reconciliation efforts than in other cities. The City also tends to focus on political issues like affordable housing, addiction, and anti-racism. City Council and residents tend to lean left-of-centre, so this political culture enables bold equity policies to be adopted more easily. Additionally, Vancouver has a considerable wealth gap and many issues related to housing and health outcomes disproportionately impact Indigenous communities and people of colour.
  - Over 50% of Vancouver residents identify as a minority.<sup>9</sup> [Vancouver was one of the first cities in Canada to appoint a Chief Equity Officer and Equity Office \(EO\), which is a cross-functional role.](#) Further, Vancouver is a well-resourced city and has a large institutional capacity for city-wide initiatives, with the ability to collect robust data over long evaluation periods.
- **Project Goals: Outline the key objectives of the initiative, how did they measure success and what metrics were used.**
  - The Equity Framework outlines 6 commitments: long-term engagement, creating spaces for learning, shared accountability, representation in leadership, fostering relationships and adequate resourcing.
  - The overarching goal made clear through these commitments is to embed equity in all city-wide work. Inspired by GDEIB, the Framework groups work into four groups of activities: Foundational, Internal, External and Bridging. The Equity Framework does not prescribe detailed actions that need to be taken within each of these categories, but rather the commitment to identifying and tracking the progress of ongoing and new actions.
    - External group actions mainly refer to policy directions that require motions to move forward.
    - Foundational, Internal and Bridging group actions mainly refer to changes in organizational culture, or administrative and operational structures and procedures. Such actions will be directed by staff internally.
  - Vancouver utilizes the GDEIB tool, which has four focus areas and fourteen categories of action, each category with an assessed and target score.<sup>10</sup> In 2021, the City was scored between Levels 1.5 and 3.5, depending on the category and has set targets for 2025 of Levels 3 to 4 depending on the category.

<sup>9</sup>[Stats Canada source.](#)

<sup>10</sup>Level 1 (inactive), Level 2 (reactive), Level 3 (proactive), Level 4 (progressive) or Level 5 (best practice).

- **Target Audience: Identify the communities or groups engaged in the project**
  - **City Staff and Departments:**
    - The Framework guides internal practices, policy development, hiring, training, and service delivery to ensure equity is embedded across all operations.
  - **Equity-Denied Communities:**
    - The Framework is designed to address the needs of communities historically and currently experiencing systemic exclusion or discrimination (e.g., Indigenous, Black, racialized, 2SLGBTQ+, disabled, low-income, immigrant, and refugee populations).
  - **City Leadership and Decision-Makers:**
    - The Framework includes a commitment to ensuring representation across City leadership, including City Council and senior leaders, who are responsible for championing, resourcing, and evaluating equity initiatives.
  - **Community Partners and Stakeholders:**
    - The Framework works with and consults nonprofits, community organizations, advocacy groups, and residents who interact with city services and help co-develop equitable approaches and identity-based strategies.
  - **Advisory Bodies and Affinity Groups:**
    - The Framework engages internal and external groups, both in the design and ongoing evaluation process. These bodies provide feedback, insight, and lived experience to inform policy and implementation.

### 3. ENGAGEMENT STRATEGIES & TECHNIQUES

- **Outreach Methods: Describe the methods used to reach and engage target groups. Highlight which methods were most successful and why.**
  - The City directly targeted the staff and departments who would be utilizing the Framework. They developed identity-based strategies for community-facing initiatives to better understand and reduce barriers experienced by equity-denied groups. These strategies were informed by input from staff affinity groups, Council advisory bodies, a cross-departmental leadership team, and an external advisory committee of equity experts.
  - Identity-based strategies were co-developed with community groups and nonprofit organizations.
- **Equity Considerations: How did the project ensure participation from underserved communities**
  - Identity-based work was implemented to understand and mitigate the experiences and barriers faced by underserved communities. This included adjustments to programs, policies, and public engagement practices.
  - Efforts like the [Language Access Policy](#) (led by the Civic Engagement and Communications department) ensure plain-language communications and engagement safety planning were implemented to make participation easier for those with language or psychological safety barriers.
  - A dedicated leadership team across City departments helped integrate identity-based and community-facing strategies, ensuring departments developed tailored equity approaches relevant to their service areas.

- **Key Challenges & Solutions: Outline any barriers to engagement and how they were addressed**
  - **Challenge:** The lack of standardized, disaggregated data made it difficult to consistently assess equity impacts across programs, limiting the ability to measure progress effectively.
  - **Solution:** Development of an accessibility dashboard and a centralized equity dashboard to access and use disaggregated population data to inform decisions.
  - **Challenge:** Staff across departments had different understandings of equity principles before the Framework launched.
  - **Solution:** Delivering ongoing and customized training to build shared capacity and confidence in applying an equity lens. The EO worked with each department and empowered them to lead their internal strategies while supporting ongoing equity initiatives.
  - **Challenge:** Many departments faced constraints in staffing and time, making it difficult to fully embed equity into all aspects of their work, particularly smaller teams with fewer dedicated equity roles.
  - **Solution:** The City invested in creating new equity-focused roles (and the EO) and provided additional training for staff to build capacity across departments. They also formed a cross-departmental leadership team to drive equity initiatives more effectively.
  - **Challenge:** Distrust of government and engagement fatigue. Some equity-denied communities expressed skepticism or fatigue from repeated consultations without clear follow-through, highlighting the need for dedicated, long-term trust-building and accountability.
  - **Solution:** Efforts to build trust included ongoing community consultations, embedding equity in decision-making processes, and showing tangible outcomes from feedback. Co-developing strategies with community members and aligning with UNDRIP supports this solution.

#### 4. IMPLEMENTATION & EXECUTION

- **Project Phases: Break down project timeline and key milestones**
  - **2018–2019:** Work on the Framework began with anti-racism discourse among City staff. Staff across all ranks and departments began equity training and started to discuss topics that would inform the Framework, becoming engaged in learning/unlearning processes.
  - **2020–2021:** In response to the COVID-19 pandemic and global uprising against racism in light of the widespread Black Lives Matter movement, the public and City staff demanded that Vancouver show action towards anti-racism, not just make statements. The City Council motioned to address systemic racism and pandemic-related disparities and committed to developing a city-wide Equity Framework and anti-racism infrastructure.
  - **2021:** The Council formally adopts the Equity Framework, and it is officially launched.
  - **2022:** Initial planning for the Women’s Equity and Racial Equity Strategies. Council adopted the UNDRIP Strategy, which outlines “Ending Indigenous-specific racism and discrimination” as one of its four key themes.<sup>11</sup>

<sup>11</sup>Staff have since identified two early actions for addressing environmental racism as a part of the UNDRIP Action Plan 2024-2028 that was approved by Council in June 2024.

- **2023:** Scaling up the actions under the Framework. The City established the Equity Office and appointed a Chief Equity Officer. Launch of the [Youth Safety and Violence Prevention Strategy](#).
- **2024:** [Council released a mid-year update on the Framework](#), with actions completed and
- **Partnerships & Collaboration: Highlight any partnerships that played a significant role in the initiative's success**
  - This Framework touches and collaborates with every single department. Here are a few examples:
    - Vancouver's Social Policy Team created the initiative, and the new EO joined as a leading partner with oversight for implementation.
    - EO and the Sustainability team are collaborating to integrate equity into climate action work and hire an Equity and Reconciliation Planner.
    - In collaboration with the Staff with Disabilities ERG, the Recruitment Team updated job postings and the City's careers website to address accessibility barriers.
- **Funding & Resources: Provide an overview of how the project was funded and what resources were leveraged.**
  - The Equity Framework is primarily funded through allocations from the City's operating budget. There are specific resources designated for the Equity Office and related initiatives. For example, the [2025-2026 Biennial Budget](#) includes a decision package to allocate a dedicated budget for language services from the Human Resources budget to the Office of Equity and Inclusion.

## 5. OUTCOMES & IMPACT

- **Key Achievements: Summarize the major outcomes of the project**
  - **Foundation Group**
    - Nearly all departments have adopted equity-related actions tailored to their specific mandates. This includes the creation of new equity-focused roles, the development of customized departmental equity strategies, and the integration of equity into organizational expectations and cultural norms.
    - The EO launched a Workplace Restoration Program to support conflict resolution and culture change, while also strengthening the Equity Advisory Committee and Employee Resource Groups (ERGs).
    - A training module on Equity and Reconciliation Leadership has been incorporated into the City's Leadership Essentials in Action (LEAP) program.
    - EO has provided targeted leadership development to Financial Services and Capital (FSC) leaders and will facilitate equity-focused discussions through ongoing Justice, Equity, Diversity, and Inclusion (JEDI) meetings.
    - Launched a new Workplace Restoration Program to equip leaders with tools to build restoration awareness and lead cultural change within their teams.

- **Internal Group:**
  - In collaboration with the Staff with Disabilities ERG, the Recruitment Team updated job postings and the City’s careers website to address accessibility barriers.
  - A recruitment equity review is underway to identify tools that reduce barriers for applicants with disabilities. Progress includes reviewing worksites, clarifying medical accommodations, and adjusting job requirements to widen access.
  - Vancouver Fire and Rescue Services introduced its first Pregnancy Policy, and HR is developing new employment statuses and launching a gender identity staff survey to support compliance with the BC Pay Transparency Act.
  
- **Bridging Group:**
  - Technology Services is developing an accessibility dashboard and a centralized equity dashboard to access and use disaggregated population data to inform decisions.
  - The Civic Engagement and Communications (CEC) department has prioritized accessibility by providing web accessibility training and updating templates. City Clerks continue to pilot closed captioning in Council meetings, aiming for full implementation.
  - Equity-focused training has expanded across departments, including mental health first aid for Protective Services, allyship and inclusion training in Engineering, and JEDI training for Fire Services leadership.
  - EO and the Sustainability team are collaborating to integrate equity into climate action work, hire an Equity and Reconciliation Planner, and develop an equity asset map.
  
- **External Group:**
  - The UNDRIP Strategy and Action Plan were completed, with a Relationship Protocol signed with the Squamish Nation and drafts underway with the Musqueam and Tsleil-Waututh Nations. Staff-to-staff summits are ongoing to align City initiatives with national priorities.
  - The [Residential School Memorial](#) was respectfully closed with cultural guidance.
  - ACCS is revising the granting process to reflect more equitable and accessible considerations.
  - A new Language Access Policy was launched to support City staff with training, tools, and templates. This will expand to include social media translation guidelines, outreach to ethnocultural media, safety planning and community engagement guidelines.
  - Reforms have increased flexibility and accessibility in the bid process for equitable procurement.
  
- **Metrics & Data: Include any relevant statistics, survey results, or qualitative feedback that demonstrate impact.**
  - Employee and Leadership Engagement: Leadership participation in equity training (e.g., Equity and Reconciliation Leadership modules in LEAP) and JEDI meetings demonstrates broad organizational buy-in.
  - Workplace Accessibility and Inclusion: Recruitment efforts led to the integration of accommodation statements in job postings and the ongoing development of an accessibility dashboard and an equity dashboard for tracking progress.
  - Indigenous Relations: The UNDRIP strategy was completed, and tracking city-wide progress through the Action Plan was presented to City Council in June 2024.

- Ongoing data modernization: Updating the HR Information System enables the City to collect, analyze, and report on data related to equity progress. The City continues to work towards accessing disaggregated population-level datasets.
- **Equity Metrics: Where there are specific equity metrics included in the project. How was the equity driven language determined.**
  - The language of the Framework was developed through consultation with Employee Resource Groups (ERGs) and community stakeholders. This included extensive consultation with the Staff with Disabilities ERG and Indigenous partners to directly inform how the language was framed to be accessible and inclusive while aligning with the City's reconciliation goals.
  - Equity language was further guided by consultation with external resources and partners, including UNDRIP, W3C Web Accessibility Guidelines, BC Pay Transparency Act, and best practices from academic research.
  - The City launched a staff survey to collect gender identity data to comply with the BC Pay Transparency Act and identify pay gaps.
  - All departments developed tailored equity strategies and tracked them through internal reporting.<sup>12</sup>

## 6. INDICATORS & MEASUREMENT

- **Climate Equity Indicators are key metrics used to ensure that climate action initiatives are inclusive, effective, and equitable. These indicators help track progress, identify disparities, and guide decision-making to ensure that benefits are shared across all communities, particularly those most vulnerable to climate impacts.**
- The success of the Framework, as a living document, can be measured over time and through consistent evaluation of equity across city-led departments. This can include policy changes, community-centred metrics, and expanding organizational capacity to deliver on equity targets. **Such as:**
  - Department-specific equity action plans adopted/updated.
  - Anti-racism policies and reconciliation strategies were implemented.
  - Number of equity reviews in budget processes.
  - Level of engagement with historically excluded groups.
  - Number of co-created community initiatives and strategies (e.g. Youth Safety and Violence Prevention Strategy, Women's Equity Strategy).
  - Number of trainings available for staff, and number of staff trained in equity, anti-racism, mental health first aid, and trauma-informed practices
- **Describe the key metrics used to measure equitable outcomes in the project (e.g., access to resources, participation rates from marginalized communities, distribution of benefits).**
  - The Equity Framework uses three perspectives to measure equity progress:
    - Justice perspective: Tracks indicators like community health, relationships with Indigenous Nations, policy changes removing barriers, workforce representation, and

<sup>12</sup> See Appendix B of the [Council report](#).

reported sense of belonging.

- Effectiveness perspective: Assesses trust and participation from marginalized groups, success in hiring and retention, innovation, and overall performance.
- Compliance perspective: Focuses on the accessibility of internal policies and employee trust in the City.
- See the Vancouver [open data portal](#) for other indicators used by the City to track equity across departments and other internal strategies.
- **Describe the Climate Equity Indicators used to position the project within the municipality (ex. Affordability, Health and Safety etc.)**
  - The City is also working to refresh the Health City Strategy and recommit to long-term goals to address inequities in the determinants of health.
    - [Health city dashboard](#)
    - Implementation of department-specific learning programs.
- **Low-Carbon Impact: Define how the project's success in emissions reductions and sustainability efforts was tracked.**
  - The plan does not explicitly outline any carbon-related metrics, however, they collaborate with the Sustainability team to embed equity in climate mitigation and adaptation work.
  - The Planning, Urban Design and Sustainability (PDS) team is working on an equity asset map, continuing to work on an evaluation framework for projects where climate and equity intersect, and refreshing climate plans with an equity lens.
- **Social & Economic Benefits: Outline measurable improvements such as job creation, energy savings, or health benefits.**
  - Number of staff participating in equity-related training
  - Number of accessibility barriers removed from job postings and City websites
  - Updates to job classifications and accommodations policies
  - Implementation of department-specific learning programs
  - Number of Indigenous / racialized employees in leadership positions
  - **City of Vancouver economic metrics related to equity:**<sup>13</sup>
    - Employment Rate
    - Engagement by Visitors and Locals
    - Equity Impact Analysis Reports
    - Equity Index Score
    - Living Wage Jobs in Vancouver
- **Data Collection Methods: Describe the approach used to gather and analyze data to ensure transparency and accuracy.**
  - The City tracks progress on equity across four main groups, as per GDEIB.
    - **Foundational:** The base of equity work and is necessary for the effective operation of all other categories.

<sup>13</sup> Full list of economic metrics in the [city budget](#).

- Vision, Strategy, and Rationale
  - Leadership and Accountability
  - Structure and Implementation
  - **Internal:** Focuses primarily on strengthening Human Resource policies, systems and processes to advance equity. Progress in this area involves ongoing partnerships with unions.
    - Recruitment
    - Advancement and Retention
    - Job Design, Classification and Compensation
    - Work-Life Integration, Flexibility and Benefits
  - **Bridging:** Provide critical linkages that connect foundational work with the internal and external foci of equity at the City.
    - Assessment, Measurement, Research
    - Learning and Development
    - Communications
    - Connecting Equity and Sustainability
  - **External:** How the City offers its public services to – and interacts with – residents, communities and other governments and partners.
    - Partnerships and Grants
    - Public Engagement and Customer Service
    - Responsible Procurement
- **Replicable Tools & Resources: Templates, toolkits, frameworks that could support future projects**
    - [Health city dashboard](#)
    - Vancouver [open data portal](#)
    - [Language Access Policy](#)
    - [Vancouver’s CEC department training in plain language, W3C accessibility, and translation guidelines.](#)
    - [Vancouver’s updated ACCS granting processes.](#)
  - **Additional Resources: Project Website or Report Links**
    - [Equity Framework](#)
    - [2024 Equity Framework Update](#)
    - [Health city dashboard](#)
    - [Vancouver poverty-reduction plan](#)
    - [Global Diversity, Equity and Inclusion Benchmarks \(GDEIB tool\)](#)
    - [Youth Safety and Violence Prevention Strategy](#)
    - Vancouver [open data portal](#)
    - [Vancouver Biennial Budget](#)
    - [Vancouver UNDRIP Strategy 2021, updated 2024](#)

## 1. CASE STUDY OVERVIEW: PORTLAND CLEAN ENERGY COMMUNITY BENEFITS FUND (PCEF)

- **Location:** Portland, OR, USA
- **Municipality / Department Leading (if applicable):** Managed by Portland's Bureau of Planning and Sustainability
- **Project Duration:** 4 funding rounds since 2018

## 2. PROJECT BACKGROUND & OBJECTIVES

- **Context & Rationale:** Describe the problem or challenge the project aimed to address. Provide a region-specific analysis to contextualize the issue—why and how is this challenge affecting the particular community or area? Consider including relevant local data, policy gaps, or historical factors that contribute to the problem.
- **Context:**
  - Recognizing that low-income communities and communities of colour are disproportionately excluded from climate solutions, the PCEF was established to fund a clean energy future for frontline communities.
  - PCEF is a city-led climate justice fund implemented by voters in 2018, placing a 1% Clean Energy Surcharge on large retailers to fund clean energy and community resilience projects.<sup>14</sup> From 2023–2028, PCEF planned to award over \$750M in climate grants with equity at the center. Unexpected additional funds increased that target to \$1.6B. It passed with nearly 65% of the vote, showcasing a rare example of a climate justice measure being created by ballot initiative. This shows that Portland voters are environmentally minded and deeply supportive of equity-centred climate solutions.
  - PCEF is the first project of its kind in Oregon, led by a coalition of communities of colour.
  - Each funding round, PCEF submits a portfolio of projects to the City Council as a recommendation. The Council approves the projects to receive funding. For all four funding rounds so far, the City Council has been extremely supportive of the recommendations, all assessed and put forward by PCEF based on eligibility criteria mapped out in their mutual equity and climate framework. The fund and Council both center equity metrics in their evaluations, so it is not difficult to pass funding for equity-centred projects and initiatives.
  - In 2022, the CIP was launched to strategically guide funding and create a 5-year plan to scale PCEF's impact, and amended this plan in 2024 with additional goals.
- **Regional Analysis:**
  - Portland is a city primed for an initiative like PCEF because it has a progressive political climate, a robust ecosystem of nonprofits and community-centred organizations, and

<sup>14</sup> A business must [register for a Clean Energy Surcharge account](#) if they report total gross income of \$1 billion or more and Portland gross income of \$500,000 or more on their Business Tax Return.

has directly faced extreme climate events.

- Portland already has strong climate frameworks and policy infrastructure to support a climate justice fund. The city's Climate Emergency Declaration in 2020 committed Portland to approach climate action from an equity lens and has since integrated racial equity into its governance structures. Portland's Bureau of Planning and Sustainability (BPS) and City Council have consistently championed climate action, racial equity, and community-based investment. This institutional alignment reduces political barriers and enables smoother implementation.
  - There is a robust network of BIPOC-led non-profits ready to support the implementation of the types of projects PCEF funds, ensuring local capacity to deliver on desired outcomes. This ecosystem of mission-driven organizations is embedded in Portland's grassroots, local solutions culture. The City has a deep history of activism, and many well-known community activists and advocates are involved in the coalition leading PCEF.
  - Portland has experienced intensifying climate events, such as heat waves, wildfire smoke, and displacement from extreme weather. The 2021 heat dome disproportionately impacted communities (such as East Portland) with low tree canopy and energy-inefficient housing.
- **Project Goals: Outline the key objectives of the initiative, how did they measure success and what metrics were used.**
    - PCEF overarching goals: Invest in community-led projects, reduce emissions, create economic opportunity, make Portland more resilient to climate change. They seek to fund projects that directly respond to Portland's climate vulnerabilities (e.g., extreme heat, wildfire smoke), and prioritize high-road job training, contractor support, and local hiring, especially for people from historically marginalized backgrounds.
    - Across all funding pathways, the PCEF seeks to increase diversity across the climate contractors and workforce development. For contractors, they aim for a minimum of 30% of total construction costs to be contracted to businesses certified by the Oregon Certification Office for Business Inclusion and Diversity (COBID).<sup>15</sup> For workforce diversity, PCEF's targets are that at least 30% of total apprentice hours must be worked by women and 30% must be worked by POC. For journey-level trades, at least 25% of total hours, by trade, must be worked by POC and 10% by women. Both goals are conditional for contracts with more than \$350,000 funded by PCEF for hard construction costs. Subcontractors less than \$100,000 are excluded.
    - The Community Grants program awards either planning or implementation grants to community-led organizations. Each project or program funded has its own key objectives and success metrics.<sup>16</sup> However, the total portfolio of projects for the third round of funding in the Community Grants Program is expected to result in a lifetime GHG reduction of ~85,000 metric tons CO<sub>2</sub>e and includes training for 2,600+ individuals and assistance for 383

<sup>15</sup> Certified as: Disadvantaged Business Enterprises (DBE), Minority-Owned Business Enterprises (MBE), Woman-Owned Business Enterprises (WBE), Emerging Small Businesses (ESB), Service-Disabled Veteran-Owned Business Enterprises (SDVBE).

<sup>16</sup> Planning Grants: Builds capacity for future projects through research, feasibility assessments, community outreach, and partnership building. These grants support organizations to create community-informed project proposals.

Implementation Grants: Funds projects that advance climate justice through both physical improvements and non-physical activities. Funding can be used for staff time, contracted work, equipment, materials, supplies, overhead, and other necessary project costs.

businesses, emphasizing workforce development in clean energy and green infrastructure.

- [All programs and projects](#) are evaluated within PCEF's equity and climate framework and tracked on the public [dashboard](#). This framework prioritizes benefits to frontline communities, community leadership, implementation feasibility, greenhouse gas (GHG) emissions reductions, and accountability. For a list of the collective outcomes of completed projects to date, please see section 5. For examples of equity-aligned metrics from various projects funded through PCEF, please see section 6 below.
- **Target Audience: Identify the communities or groups engaged in the project**
  - PCEF targets groups historically under-resourced by clean energy programs. These groups include: low-income communities, people of colour, and people with disabilities.
  - PCEF acknowledges that these are the same groups that are the most vulnerable to negative climate impacts.

### 3. ENGAGEMENT STRATEGIES & TECHNIQUES

- **Outreach Methods: Describe the methods used to reach and engage target groups. Highlight which methods were most successful and why.**
  - **Training sessions and applicant support:**
    - Staff, alongside subject matter experts, provided six trainings for prospective applicants on: budgeting, grant writing, project design, community solar, green infrastructure, regenerative agriculture and energy efficiency (for residential and commercial buildings).
    - All training sessions were recorded and uploaded, receiving 740+ views. In addition, staff met with various smaller organizations to provide budgeting and grant writing training.
    - PCEF staff hosted 11 virtual applicant support sessions at flexible times, which were attended by 200+ individuals.
  - **Community outreach:**
    - PCEF engages with the city's vast ecosystem of community-led and BIPOC-led non-profit organizations to reach communities directly.
    - PCEF-funded organizations support outreach related to culturally-specific services. These include organizations like APANO (Asian Pacific American Network of Oregon), the African Youth & Community Organization, and the Rohingya Youth Association.
- **Equity Considerations: How did the project ensure participation from underserved communities.**
  - PCEF explicitly targets communities that have historically been excluded from environmental and economic investments. Projects funded through the Community Grants Program are designed and led by nonprofit organizations in Portland, intentionally shifting power and resources to the people most impacted by climate change and systemic exclusion.
- **Key Challenges & Solutions: Outline any barriers to engagement and how they were addressed.**
  - **Challenge:** Due to systemic racism and climate injustice, many communities of colour and low-income communities are often excluded from, or not consulted on, government-led

<sup>17</sup> [Read More](#)

climate initiatives at the national and local levels.

- **Solution:** To address this, the City of Portland intentionally designed PCEF to be led by communities most impacted by climate change, and frontline communities. Further, the PCEF and its 5-year CIP embed equity across all initiatives, including [Guiding Principles](#) and an equity and climate framework.
- **Challenge:** Grassroots and smaller community-based organizations tend to face additional barriers in accessing traditional funding structures and often lack grant-writing capacity.
- **Solution:** This is why PCEF simplified the application process with various trainings and resource supports to build organizational grant capacity and navigate the application process. Trainings were held at flexible times and made available virtually, to ensure they were accessible to all.

*\*\* In the early stages of the fund, Portland's City Auditor [released a report](#) on the PCEF management structure, outlining areas for improvement and changes. According to the auditor's office, the program was viewed as high risk and warranted an earlier audit in comparison to other programs. In response, PCEF staff and committees clearly defined performance metrics and set clear, actionable, climate-related goals. Additionally, they reassessed the budget requirements program's management structure.*

- Since PCEF is a voter-approved initiative, there were high public expectations and a sense of urgency from grassroots organizations that clashed with administrative processes. The fund faced criticism regarding governance and oversight from the public, media, and political leaders. In 2022, a [City commissioner demanded that staff draft a set of recommendations](#) for improvements to PCEF programs to address the audit recommendations (mentioned above) and to meet the following additional objectives:
  - Identify changes to accelerate funding for decarbonization projects
  - Address O&A needs
  - Illustrate a clear connection to the [City of Portland's decarbonization goals](#).
  - PCEF staff submitted the recommendations to City Council, which were unanimously approved in October 2022, showcasing robust support from the Council and alignment with the city's climate and equity goals. The approved proposal can be found [here](#).

## 4. IMPLEMENTATION & EXECUTION

- **Project Phases: Break down the project timeline and key milestones**
  - **2016–2018:** [Coalition building and advocacy](#). Community-led groups created a campaign for a climate justice fund. In [2018, ballot](#) language was drafted by a grassroots coalition.
  - **2018:** The Ballot was passed with a majority.
  - **2019–2020:** [PCEF Grant Committee](#) convenes under the direction of the City of Portland to develop programming and eligibility criteria, integrating equity metrics into grant scoring.
  - **2020–2021:** First funding round opens (RFP 1), and [45 projects approved for a total of \\$8.6M](#).
  - **2022:** PCEF launches work on the CIP, a 5-year roadmap to scale PCEF. Second funding round opens (RFP 2), with dedicated support for workforce development and renewable energy. [Over \\$100M was awarded to 65 projects](#).
  - **2023:** City Council unanimously adopts the CIP at \$750M to fund 16 strategic programs and the Community Grants Program. PCEF enters the third funding round (RFP 3).
  - **2024:** PCEF recommended 71 organizations to be awarded \$91.9M through RFP 3.

- **2025:** The fund has just entered its fourth funding cycle, and the [Community Grants 2025](#) applications are currently open and will close in May 2025.
- **Partnerships & Collaboration: Highlight any partnerships that played a significant role in the initiative's success**
  - PCEF was born out of strategic collaboration. The initial ballot initiative, championed from 2016-2018, was led by a coalition of community-led, equity-focused organizations.<sup>19</sup> Now, the PCEF Grant Committee is responsible for reviewing applications and putting recommendations for funding forward to the city. This committee is currently made up of 9 members, representing various strategic partner organizations. In addition, the [High Road Advisory Council](#) provides support to the Committee and staff.
  - PCEF partners with many municipal departments and city-led climate initiatives to align on climate goals and Portland's net-zero strategy. This mainly includes the Bureau of Planning and Sustainability (where PCEF is housed), the Office of Equity and Human Rights, and the Office of Community and Civic Life.
  - Local consultants and organizations run training that supports the application process. This also includes partnering with equity consultants and expert facilitators.
  - To ensure tangible economic opportunities related to workforce development goals, PCEF collaborates with organizations that focus on local hiring, union labour, capacity-building, and career training.
  - During the creation and implementation of the CIP, PCEF collaborated with local stakeholders and completed a robust community engagement plan.<sup>19</sup>
- **Funding & Resources: Provide an overview of how the project was funded and what resources were leveraged.**
  - The PCEF is funded through a 1% Clean Energy Surcharge that the City of Portland placed on large retailers, per the ballot measure in 2018, with \$1B in national revenue and \$500,000 in local revenue. Funds are distributed to eligible community-led organizations for projects and programs that advance climate justice, upon recommendation by the PCEF Grant Committee to the Mayor and City Council for evaluation. In the 5-year Climate Investment Plan (CIP), PCEF committed to investing over \$750 million in climate justice projects. This plan was amended in December 2024 to include additional funds, enabling PCEF to plan to invest \$1.6 billion.<sup>20</sup>
  - [As of April 2025](#), there is a proposal to increase the CES rate from 1% to 1.33%, with the additional revenue directed to Portland's general fund rather than exclusively to the PCEF. This proposal has prompted discussions about the city's role in shaping and adapting voter-approved funding to meet evolving community needs.

<sup>18</sup> Founding Organizations: [Verde](#), [Asian Pacific American Network of Oregon \(APANO\)](#), [Coalition of Communities of Color](#), [NAACP Portland Branch 1120](#), [Native American Youth & Family Center \(NAYA\)](#), [OPAL Environmental Justice Oregon](#).

<sup>19</sup> More information on the community engagement plan on [page 9](#).

<sup>20</sup> [CIP webpage](#).

## 5. OUTCOMES & IMPACT

- **Key Achievements: Summarize the major outcomes of the project**
  - PCEF is the first initiative of its kind in the USA. to be led by communities of colour and be voter-approved. In its first funding round, 80% of the funds awarded went to organizations led by or serving frontline communities.
  - In March 2025, PCEF launched applications for its fourth funding round.
  - They have awarded a total of \$1.6B in funding and awarded 359 community grants.
- **Metrics & Data: Include any relevant statistics, survey results, or qualitative feedback that demonstrate impact.**
  - PCEF has supported 211 non-profits through community grants and funded 36 strategic initiatives.
  - **Collective outcomes of completed projects, to date:**
    - 139 MWh of renewable energy generated.
    - 13,973 households received energy efficiency upgrades.
    - 14,608 MT of lifetime GHG saved
    - 412 participants completed job training, of which 43% are women
    - 131 contractors were supported, and 855 hours of support were provided
    - 57% of Community Grants expenses were contracted out locally, resulting in \$4.3M paid in wages at an average of \$42/hour
    - 110 community events hosted by PCEF staff, with an estimated 4,100 participants
- **Equity Metrics: Where there are specific equity metrics included in the project. How was the equity-driven language determined.**
  - When creating the CIP, the [PCEF implemented a Reporting and Evaluation Subcommittee](#) to provide community input on the high-level language and metrics to be used publicly and inform program design, tracking impact across all funded projects, and evaluation. There is regular program evaluation conducted by PCEF to reflect on metrics and identify areas of improvement, based on peer benchmarks and community feedback.
  - This [Glossary Page](#) of terms and metrics for the PCEF [dashboard](#) defines the metrics used and the context for their purpose.

## 6. INDICATORS & MEASUREMENT

- **Climate Equity Indicators are key metrics used to ensure that climate action initiatives are inclusive, effective, and equitable. These indicators help track progress, identify disparities, and guide decision-making to ensure that benefits are shared across all communities, particularly those most vulnerable to climate impacts.**
  - All PCEF investments must have defined metrics and reporting requirements, standardized under the CIP and the equity and climate framework. PCEF looked at the following program development metrics when developing the equity framework to guide the CIP.
    - The number of organizations working on PCEF projects or programs serving priority populations

- The number of training opportunities currently offered is used to determine levels of access to skill-building related to climate jobs.
  - The amount of funding directed to community organizations and the government for climate and equity-related projects.
  - The number of partnerships formed between non-profits and the private sector to implement PCEF-funded projects and programs. This provides a stocktake on whether the necessary partnerships are forming in the City to effectively implement climate change programs.
  - The level of engagement of community members and organizations through planning processes to determine if the community is building or leadership capacity is required to sustain efforts for the long term.
- **Describe the key metrics used to measure equitable outcomes in the project (e.g., access to resources, participation rates from marginalized communities, distribution of benefits).**
    - Equity-metrics tracked and showcased publicly:
      - Gender (I prefer not to answer, man, woman)
      - Race/ethnicity (I prefer not to answer, Asian, Black or African American, Latino/a/e/x, or Hispanic, White, Native Hawaiian or Pacific Islander, Middle Eastern or North African, American Indian / Alaska Native / Indigenous Peoples of the Americas, Other)
    - [Each of the 16 strategic programs has detailed climate and equity metrics, outlined in this report.](#)
  - **Describe the Climate Equity Indicators used to position the project within the municipality (ex. Affordability, Health and Safety etc.)**
    - The project was explicitly positioned as a climate justice fund.
  - **Low-Carbon Impact: Define how the project's success in emissions reductions and sustainability efforts was tracked.**
    - GHG reductions ( MT of lifetime GHG saved)
    - Number of homes weatherized or retrofitted
    - Renewable energy installed (kW)
    - Number of trees planted and green space created
  - **Social & Economic Benefits: Outline measurable improvements such as job creation, energy savings, or health benefits.**
    - Utility savings and health improvements in homes
    - Community engagement milestones (workshops, outreach events, etc.)
    - Training participants and job placements
    - Number of contractors supported through PCEF projects, and total hours of support provided
    - Amount of wages paid to contractors through PCEF-funded projects

- **Data Collection Methods: Describe the approach used to gather and analyze data to ensure transparency and accuracy.**
  - [The public dashboard ensures transparency](#) and features all available reporting data of PCEF investments as of December 31, 2024. The dashboard offers various levels of expansion and different ways to visualize the data to ensure accessibility. The CIP dictates that all programs and projects that the PCEF invests in must be measured and tracked on the public dashboard, being evaluated within PCEF's equity and climate framework. Organizations receiving investment are beholden to the standardized reporting requirements of PCEF.
  - In addition to tracking amounts invested across community grants and funding allocations, PCEF approached data collection with the following five categories:
    - Climate Benefits
    - Workforce Development
    - Contractor Development
    - Contractor Workforce Diversity
    - Community Engagement
  - As part of the community engagement plan to implement the CIP, [there was an accessibility and engagement survey completed](#). This project aimed to identify the main barriers and challenges facing the communities PCEF aimed to serve, and engaged over 170 participants. Results informed the program design and evaluation for PCEF. The survey results and methodology are available in this [report](#).
- **Replicable Tools & Resources: Templates, toolkits, frameworks that could support future projects.**
  - Community-led governance models and the [PCEF Committee's working agreement](#). The guideline principles and equity and antiracism implementation are relevant.
  - The methodology used to conduct the CIP's accessibility and [engagement survey](#).
  - Page 9 of [this report](#) includes a step-by-step guide for conducting community engagement utilized to create the Climate Investment Plan.
  - PCEF's 2025 update to the [application handbook and guide](#).
    - [List of additional resources for grantees](#).
  - [Workforce and contractor equity agreement templates](#) to ensure the grantee's projects deliver jobs and hire locally.
  - The [PCEF's applicant handbook](#) has incredible and thorough resources to support applicants and organizations in the grant writing process.
  - Drafts, iterations, and public feedback on the Climate Investment Plan can be found [here](#). This is a good example of how to build accountability and transparency into strategic planning, becoming adaptable to community needs.
  - Public, interactive [dashboard](#), and accompanying glossary to [define equity metrics](#).
- **Additional Resources: Project Website or Report Links**
  - [PCEF Home Page](#) / Overview. Includes links further reports and outlines grant eligibility, guiding principles, funding opportunities, and background on PCEF.
  - [PCEF Funding Recommendations for Round 3 \(2024\)](#)
  - Clean Energy Surcharge [details](#)

- [Report](#) with additional details on the scope and data sources used to develop the climate and equity metrics PCEF tracks.
- [Awards portal](#)
- [PCEF awards more than \\$740 million to climate justice projects](#)
- [2018 Initiative Petition Log \(General Election\) \(24/ED/108652\)](#)
- [Climate Investment Plan: PCEF's five-year funding road map to climate action | Portland.gov](#)
- [2025 Applicant Handbook](#)
- [Strategies for Inclusive Contracting and Workforce | Portland.gov](#)
- [Portland.govatives \(November\\_2018\)](#)
- [PCEF Committee Working Agreement](#)
- [Clean Energy Fund Sparks controversy in PNW](#)
- [2025 Community Grants cycle | Portland.gov](#)
- [Climate Investment Plan Supporting Documents](#) (iterations, drafts, community feedback etc.)
- [2021 PCEF Inaugural Grant Recipients](#) (RFP #1, awarded April 2021) | Portland.gov
- [April 2025 proposal to increase surcharge](#)

## 1. CASE STUDY OVERVIEW: ENERGY POVERTY ALLEVIATION STRATEGY

- **Location:** Philadelphia, PA, USA
- **Municipality / Department Leading (if applicable):** [City of Philadelphia, Office of Sustainability \(OOS\)](#), implementation supported by the [Philadelphia Energy Authority](#)
- **Project Duration:** 5 years

## 2. PROJECT BACKGROUND & OBJECTIVES

- **Context & Rationale:** Describe the problem or challenge the project aimed to address. Provide a region-specific analysis to contextualize the issue—why and how is this challenge affecting the particular community or area? Consider including relevant local data, policy gaps, or historical factors that contribute to the problem.
- **Context:**
  - When Democrat Mayor Cherrille L. Parker took office in 2023, she became the first woman in Philadelphia to hold the office. Immediately, she committed to a 100-Day Action Plan to outline her immediate priorities for a “[safer, cleaner, greener Philadelphia with economic opportunity for all](#).” Mayor Parker’s plan emphasizes community engagement and feedback, with commitments to ensure the government is reforming programs that are not meeting community needs and scaling programs that increase public safety & quality of life, promote economic development, and support education and youth engagement. At the same time, Mayor Parker announced a \$2B plan to overhaul housing in the city, funding which could be applied to organizations and programs within the scope of the Energy Poverty Alleviation Strategy.
  - The strategy was created to serve as a critical component of Parker’s action plan and to reduce the energy burden as a major economic and environmental incentive.<sup>21</sup> Almost 70% of the city’s GHG emissions come from buildings and industry, so the Energy Poverty Alleviation Strategy’s goal to address energy poverty is in alignment with the city’s goal to achieve carbon neutrality by 2050.<sup>22</sup>
  - This strategy aims to leverage and support an ecosystem of existing city-run energy and housing programs that reduce the energy burden, known as the Universal Services, as well as a variety of community-based organizations.<sup>23</sup>
- **Regional Analysis:**
  - Philadelphia has one of the highest energy burdens in the USA.<sup>24</sup> Key factors contributing to this include a history of disinvestment in communities, a lack of funding for energy efficiency and repairs, widespread poverty, and an aging housing stock. High energy burdens disproportionately impact low-income residents, renters, and BIPOC communities. This burden is expected to increase as climate impacts cause rising temperatures in the city.

<sup>21</sup> The DOE’s Office of Energy Justice defines [energy burden](#) as the percentage of household income spent on energy bills, households with burden above 6% are considered high-burden, and above 10% are considered sever-burden.

<sup>22</sup> [City of Philadelphia GHG Numbers](#)

<sup>23</sup> Details of these programs and services can be found on [page 8, and in the appendix](#).

<sup>24</sup> [American Council for an Energy Efficient Economy \(2020\); Breakdown of energy burden in Philadelphia](#)

- More than 22% of Philadelphians live below the poverty line, and high energy bills for heating and cooling often compete with rent or increasing food and medication prices. Renters and low-income householders are unable to access financing for home improvements related to energy efficiency. Further highlighting the issue, a 2020 ACEEE study found that a quarter of low-income households in the Philadelphia metropolitan area have an energy burden exceeding 19%, which is nearly six times higher than the median energy burden.<sup>25</sup>
- Voters mandated that Mayor Parker make housing a priority, and part of that means addressing the energy burden, as many houses have outdated HVAC and insulation. Almost 70% of single-family homes in Philadelphia have higher energy costs because they are not well sealed.<sup>26</sup>
- **Project Goals: Outline the key objectives of the initiative, how did they measure success and what metrics were used.**
  - The strategy has 4 main goals:
    - Increase participation in programs that protect energy affordability and security.
    - Increase enrollment in the utility bill assistance program.
    - Reduce energy burden and emissions, promote energy efficiency.
    - Support existing weatherization measures and implement new ones in residential buildings to lower utility costs and emissions.
    - Increasing the adoption of high-efficiency, clean energy technologies.
    - Promote technologies like heat pumps to reduce costs and emissions.
    - Enable energy independence and resilience.
    - Ensuring access to distributed solar technologies such as rooftop solar, focusing on income-constrained households, including both homeowners and tenants.
  - These goals will be achieved through three approaches:
    - Support Philadelphia’s existing energy ecosystem to address barriers and challenges in access, delivery, programmatic gaps, and scaling.
    - Implement and advocate for enabling legislation and incentives at the local and state levels.
    - Strengthen and support the partner network.
- **Target Audience: Identify the communities or groups engaged in the project**
  - The plan targets BIPOC communities, low-income residents, and renters, who are most likely to face high energy burdens and energy insecurity.

### 3. ENGAGEMENT STRATEGIES & TECHNIQUES

- **Outreach Methods: Describe the methods used to reach and engage target groups. Highlight which methods were most successful and why.**
  - Strengthening partner networks is one of the strategy’s three main approaches, and it supports its outreach strategy by enabling local organizations to reach priority communities.

<sup>25</sup>[American Council for an Energy Efficient Economy \(2020\)](#)

<sup>26</sup>[Page 7 of the strategy.](#)

This approach includes capacity building and training for community-based organizations, and engaging with them as program partners to conduct outreach campaigns and expand program capacity.

- They were able to coordinate with the partner network and streamline outreach by integrating basic repair needs with energy efficiency retrofits, creating a ‘one-stop shop’ for residents and streamlining the weatherization and energy upgrade process.
- **Equity Considerations: How did the project ensure participation from underserved communities.**
  - The Steering Committee that led the planning phase of the strategy include members from energy-burdened communities and community-led organizations. This committee conducted community and technical focus groups. Community focus groups included members from BIPOC, low-income, and high-energy burden communities, and technical focus groups represented 20 organizations working on energy-related topics, including health, housing, energy affordability, and social service providers. Focus groups provided input and recommendations to be included in the final plan.
- **Key Challenges & Solutions: Outline any barriers to engagement and how they were addressed.**
  - **Challenge:** The history of disinvestment in Philadelphia led to communities being skeptical of government and city-led initiatives.
  - **Solution:** The Energy Poverty Alleviation Strategy was designed through a community engagement process, and established channels for ongoing community input to ensure programs are iterative to community needs.
  - **Challenge:** Despite a vast ecosystem of existing programs to help reduce the energy burden, many residents face additional barriers to accessing these services, such as language barriers, technology barriers, bureaucratic processes, and documentation requirements (homeownership). These barriers are amplified for renters because of the split incentive.<sup>27</sup>
  - **Solution:** The OOS streamlined the application process for various programs, including utility assistance, and conducted outreach campaigns to ensure communities were aware of the support offered. Additionally, the strategy commits to exploring rebate programs for landlords who complete energy upgrades to reduce burdens on renters, and utilizes community education workshops to raise awareness and ensure outreach is language accessible.
  - **Challenge:** Existing programs are underfunded, have long waitlists, and struggle to expand the scale and scope of program delivery. They often face high admin costs, and there is a lack of coordination between energy and housing programs in the city.
  - **Solution:** The strategy collaborated with the federal government to secure additional funding for existing programs and invested in strengthening a network of partners as one of three main approaches in the overarching plan.

<sup>27</sup>The split incentive is when landlords do not have an incentive to invest in energy upgrades in a property because the tenant, who pays the power bill, would experience the benefit of the resulting cost savings.

## 4. IMPLEMENTATION & EXECUTION

- **Project Phases: Break down the project timeline and key milestones**
  - **March 2023 - May 2024:** The Office of Sustainability convened a Steering Committee to guide the strategy's formation and conduct focus groups with energy-burdened communities. Feedback was incorporated into drafts of the strategy.
  - **July 2024:** The Energy Poverty Alleviation Strategy was launched in alignment with Mayor Parker's 100-Day Action Plan.
  - **2024-2029:** The strategy provides a framework of actions to be completed over the next five years.
- **Partnerships & Collaboration: Highlight any partnerships that played a significant role in the initiative's success**
  - The strategy was created with extensive engagement with communities experiencing energy poverty and with high-energy burdens, most notably through the Steering Committee, which included members from energy-insecure communities, utilities, community-led organizations, nonprofits, and collaborating government departments.
  - Supporting and expanding existing partner networks is a core approach of the strategy. To promote education and awareness about energy programs, the City collaborated with a robust network of local partners, including utilities and government departments and community-led organizations. These efforts expand the city's existing network and increase collective capacity to meet the strategy's goals.
  - Philadelphia has a network of 16 Neighbourhood Energy Centers (NECs) serving as a resource for residents facing energy insecurity. Three-quarters of NECs lack staff and funding capacity. As part of the strategy's efforts to strengthen existing partner networks, they are collaborating with NECs to implement a resource hub and support community efforts that address the energy burden. The strategy outlines increased collaboration between the city, NECs and Neighbourhood Advisory Committees to promote outreach and education. Additionally, they are building partnerships with various housing programs to ensure language accessibility and offer community-led energy education workshops to increase awareness among landlords.
- **Funding & Resources: Provide an overview of how the project was funded and what resources were leveraged.**
  - The City of Philadelphia leverages local, state, federal, and private funding streams for actioning on plans like the Energy Poverty Alleviation Strategy. Local incentives and programs such as the Housing Trust Fund can support affordable housing and energy efficiency improvements, and green bonds can be issued for financing energy projects. The strategy requires the City to investigate funding within existing departments and programs to leverage and allocate funds towards energy poverty alleviation.

- City Council finalized a new budget in June 2024 to include funding allocations for Built to Last, a program run under the Philadelphia Energy Authority (PEA) in collaboration with the Energy Poverty Alleviation Strategy. Philadelphia Green Capital Corp is a green bank affiliated with the [PEA and helps to bridge state and federal tax incentives and facilitate investments in clean energy projects](#).
- Mayor Parker’s Housing Opportunities Made Easy initiative is provided by borrowing \$800M is borrowed in bonds, and \$200M from local, state, and federal funding. An additional \$1B is leveraged from the city’s existing land and property assets. Parker has also called to increase realty transfer [tax from 3.278% to 3.578%](#).
- Federally, the Low-Income Home Energy Assistance Program offers financial assistance to low-income communities for energy costs and weatherization. The strategy advocates for expanding access. Through the [Inflation Reduction Act \(IRA\)](#), Philadelphia received almost \$20M for [energy-efficient buildings](#).

## 5. OUTCOMES & IMPACT

- **Key Achievements: Summarize the major outcomes of the project**
  - PEA’s launch of the [Built to Last program](#) increases access to home improvements, being awarded a \$5M budget for the 2024–2025 fiscal year. The program served 200 homes last year, and has 1600 on the waitlist. With this additional funding capacity, they hope to double the homes impacted this fiscal year.
- **Equity Metrics: Where there are specific equity metrics included in the project. How was the equity-driven language determined.**
  - This strategy is consistent with the language used across all City departments, per Philadelphia’s Racial Equity Action Plan.

## 6. INDICATORS & MEASUREMENT

- **Climate Equity Indicators are key metrics used to ensure that climate action initiatives are inclusive, effective, and equitable. These indicators help track progress, identify disparities, and guide decision-making to ensure that benefits are shared across all communities, particularly those most vulnerable to climate impacts.**
  - The Energy Poverty Alleviation Strategy, as a City initiative, employs the same key equity metrics and data tracking tools used by all City departments. Following the city’s [racial equity action plan](#), Philadelphia has a [Racial Equity Strategy Dashboard](#), including a [department guide](#) and [Workforce Diversity Dashboard](#). The Racial Equity Strategy Dashboard has status indicators for each department to illustrate progress on actions required to promote racial equity.
- **Describe the key metrics used to measure equitable outcomes in the project (e.g., access to resources, participation rates from marginalized communities, distribution of benefits).**
  - Gender (male, female)
  - Race/ethnicity (Black or African American, White, Hispanic/Latino/x, Unassigned, Asian, Native Hawaiian or Pacific Islander, Indigenous American, two or more races)

- Access to resources was determined by leveraging program waitlist data from community organizations offering energy programs and services.
- **Describe the Climate Equity Indicators used to position the project within the municipality (ex. Affordability, Health and Safety etc.)**
  - Energy burden calculations are the main driving force for this strategy (percentage of household income spent on energy bills). While this is an equity-focused climate plan, centring the Energy Poverty Alleviation Strategy is positioned as an economic opportunity. Promoting savings on utilities and energy bills, as well as committing to home improvements and incentives for landlords, made it deeply attractive to residents, many of whom listed housing as a key priority for the new Mayoral administration.
- **Low-Carbon Impact: Define how the project's success in emissions reductions and sustainability efforts was tracked.**
  - Philadelphia has a [Municipal Energy Dashboard](#) to track use. Metrics listed are city-wide.
  - Progress for carbon reduction is tracked in GHG emissions MMBtu.
  - [Philadelphia's Building Enhancement Performance Plan](#) has its [dashboard](#) showcasing energy and low-carbon tracking metrics across 34 City buildings.
- **Social & Economic Benefits: Outline measurable improvements such as job creation, energy savings, or health benefits.**
  - The workforce diversity dashboard tracks gender, age, and race/ethnicity across the municipal workforce. Gender and racial disparities across wages (average base salary) and the number of hires and retirements are displayed.
  - The Department of Health also has a public dashboard - the [Philadelphia Health Equity Dashboard](#). This tracks 16 topics based on community input, with 2-3 metrics to track progress over time by race or neighbourhood.
- **Data Collection Methods: Describe the approach used to gather and analyze data to ensure transparency and accuracy.**
  - OOS conducted focus groups (mentioned above) to gather qualitative information and data to inform and evaluate programming.
  - The strategy also leveraged publicly available data and utilized existing data sources from City departments, programs and agencies. Programs like the Low-Income Home Energy Assistance Program and NECs provided data on effective outreach. Additionally, utility companies offered data relevant for energy analysis to inform the strategy's targeted approach.
- **Replicable Tools & Resources: Templates, toolkits, frameworks that could support future projects.**
  - The glossary is found in the strategy on [page 5](#).
  - Data tracking on public department dashboards is below.
  - The [Budgeting for Racial Equity](#) process is very interesting and incredibly effective to ensure government funding is reasonably allocated to communities and services most urgently needed.

- Equity frameworks like the Urban Sustainability Directors Network (USDN)'s [equity planning tools](#).
- Greenlink's Equity [Map](#) - download a [list](#) of equity indicators across multiple categories, including: housing, demographics, health, environment, tech, social, utility burden, and transportation.
- [Energy benchmarking templates](#) from City Energy Project
- **Additional Resources: Project Website or Report Links**
  - Philadelphia's [Energy Poverty Alleviation Strategy](#)
  - Mayor Parker's [100-Day Action Plan](#)
  - [Realty Transfer Tax | Services | City of Philadelphia](#)
  - [Affordable housing plan, housing overhaul and funding mechanisms](#)
  - [Philadelphia's racial equity action plan](#)
  - [Workforce diversity dashboard](#)
  - [Philadelphia Health Equity Dashboard](#)
  - [Municipal Energy Dashboard](#)
  - [Racial Equity Budgeting Process](#)
  - [ACEEE Energy Burden Report](#)
  - Report: ["Energy Burden" On Low-Income, African American, & Latino Households Up To Three Times As High As Other Homes, More Energy Efficiency Needed](#)

## 1. CASE STUDY OVERVIEW: [SEATTLE CITY LIGHTS PUBLIC CHARGING PROGRAM](#)

- **Location:** Seattle, WA, USA
- **Municipality / Department Leading (if applicable):** Seattle City Light<sup>28</sup>
- **Project Duration:** 2023–Present

## 2. PROJECT BACKGROUND & OBJECTIVES

- **Context & Rationale:** Describe the problem or challenge the project aimed to address. Provide a region-specific analysis to contextualize the issue—why and how is this challenge affecting the particular community or area? Consider including relevant local data, policy gaps, or historical factors that contribute to the problem.
- **Context:**
  - Seattle City Light Public Charging Program responds to a structural challenge rooted in housing, environmental justice, and urban design. Through this program, especially expanding access to the Level 2 curbside charging stations, the City is addressing both the infrastructure gap for underserved populations and the broader goal of reducing transportation-related emissions in a regionally responsive and equity-centred way.
  - The program supports the City’s commitment to becoming carbon neutral by 2050. Transportation accounts for [58% of Seattle’s core greenhouse gas emissions](#). There is a clear need for initiatives like the EV charging program to meet climate goals. Seattle ranks among the top U.S. cities for electric vehicle (EV) adoption, but despite local and state EV incentives, EV adoption has lagged in communities without sufficient charging infrastructure, undermining citywide climate targets.
  - The International Council on Clean Transportation conducted a 2024 charging gap analysis for Seattle City Light’s service area. The findings revealed that, to support projected EV adoption by 2030, the region will require over 700 fast chargers and more than 11,000 Level 2 chargers across public and workplace locations.
- **Regional analysis:**
  - [In Seattle, about 55% of residents are renters](#), and many live in multifamily housing that lacks private driveways or garages. This means they cannot install personal EV chargers, creating a major barrier to EV adoption among urban and lower-income populations. Without easy and affordable access to charging, the city risks reinforcing inequities in who can participate in the clean energy transition.
    - Seattle has high urban density, with a large number of dense, hilly neighbourhoods with many hills. There is limited off-street parking, particularly in older areas where homes were not built with garages.<sup>29</sup>

<sup>28</sup> Seattle City Light was created by the citizens of Seattle in 1902 to provide affordable, reliable, and environmentally responsible electric power to the City of Seattle and neighbouring suburbs.

<sup>29</sup> [Population, Housing and Employment, Seattle Gov](#)

- Seattle has a bold [Transportation Electrification Blueprint](#) and is part of a state (Washington) that mandates 100% zero-emission new vehicle sales by 2035. The City has also committed to net-zero emissions by 2050. These policies create a supportive environment for investing in charging infrastructure and supporting programs like this.
  - Seattle residents tend to be environmentally conscious and open to new tech (early EV adopters) and rely heavily on public transport, biking, and walking. Curbside chargers complement this trend.
  - The City has experienced climate-related challenges like wildfire smoke, air pollution, and transportation-related emissions, this is disproportionately impacted historically redlined neighbourhoods. Initiatives to electrify transport are key to improving local air quality and community health outcomes.
  - Seattle implemented an [Equity & Environment Initiative](#). The program's emphasis on prioritizing installation in equity-focused areas reflects Seattle's broader commitment to racial and social equity.
- **Project Goals: Outline the key objectives of the initiative, how did they measure success and what metrics were used.**
    - **Objectives:**
      - Expand Public Access to EV Charging: Install Level 2 curbside EV chargers in residential neighbourhoods where residents lack access to off-street parking (e.g., no garage or driveway). Provide equitable charging opportunities for renters and multifamily housing residents.
      - Promote Equitable Access to Clean Transportation: Prioritize charger placement in communities underserved by existing EV infrastructure, particularly BIPOC, low-income, and overburdened communities. Support Seattle's environmental justice goals by reducing barriers to EV adoption.
      - Support the City's Climate and Electrification Goals: Help meet the targets outlined in Seattle's Transportation Electrification Blueprint, including 100% shared mobility to be zero emissions, and 90% of personal mobility to be zero emission by 2030. Reduce greenhouse gas emissions and improve air quality by enabling more residents to transition to EVs.
      - Gather Data to Inform Future Expansion: Pilot the feasibility of curbside EV charging and gather user behavior data to inform scaling citywide and potential policy or utility program changes.
    - Success was measured by evaluating both infrastructure deployment outcomes and community impact, using a mix of quantitative and qualitative metrics.
    - **Metrics:** More information is below, and all metrics City Light tracks are found on the Seattle [open data portal](#).
  - **Target Audience: Identify the communities or groups engaged in the project**
    - The program is aimed at residents who rely on street parking and do not have access to private driveways or garages, or the ability to install personal EV chargers. This group includes many renters and multifamily housing tenants. Further, there is a prioritization of communities that are historically marginalized and disenfranchised from clean energy investments, such as communities in South Seattle. These communities include Rainier Valley and Beacon Hill, both of which have high percentages of BIPOC residents and low-income residents.

- Charging needs vary significantly between rural areas with predominantly single-family homes and urban settings with dense apartment housing. While 80% of EV charging typically happens at home, low-income individuals are more likely to live in multifamily buildings or urban residences without access to private driveways, making home charging much less accessible.

### 3. ENGAGEMENT STRATEGIES & TECHNIQUES

- **Outreach Methods: Describe the methods used to reach and engage target groups. Highlight which methods were most successful and why.**
  - Local organizations and community groups helped City Light gather feedback and promote community trust. These stakeholders played a vital role in helping tailor outreach, ensure equitable rollout, and inform decisions about charger siting.
  - Almost 2000 potential charger locations were gathered through a public submission. Experts from the Department of Transportation and City Light reviewed each request based on criteria: location, # of requests per area, availability of infrastructure, and property type.
- **Equity Considerations: How did the project ensure participation from underserved communities**
  - The [Racial and Social Equity Composite Index](#) was used to ensure equitable charger placement, as well as data from the [Racial Equity Toolkit](#).
- **Key Challenges & Solutions: Outline any barriers to engagement and how they were addressed**
  - **Challenge:** Historically, public EV infrastructure investments have favoured wealthier, predominantly white neighbourhoods with higher rates of home ownership, and have not benefited renters (despite renters being a majority of residents). A 2021 report from Seattle’s Office of Sustainability & Environment revealed significant racial and economic gaps in access to EV infrastructure, particularly in South Seattle areas such as Rainier Valley and Beacon Hill. Without targeted investment and thoughtful charger placement, these communities face the risk of exclusion from the benefits of the electric transportation transition.
  - **Solution:** The City used its [Racial and Social Equity Composite Index](#) to identify and prioritize equitable locations for charger deployment. Community-based outreach helped ensure that the needs of BIPOC and lower-income residents were centred in decision-making. The program emphasizes outreach in South Seattle areas such as Rainier Valley and Beacon Hill.
  - **Challenge:** Confidence in public users and ensuring the reliability and usability of chargers over time requires active monitoring.
  - **Solution:** Partnership with ChargePoint provides real-time data on usage and functionality, enabling quick responses to outages or underperformance. City Light also held community meetings to raise awareness, collect feedback, and ensure chargers were trusted by residents.

## 4. IMPLEMENTATION & EXECUTION

- **Project Phases: Break down project timeline and key milestones**
  - **2022:** Potential charger locations were gathered. Planning phase for the Curbside Level 2 EV Charging Program to expand EV access.
  - **2023:** Seattle City Council Legislation on Public EV Charging: This legislation supports the expansion of public EV charging stations, aligning with the city's transportation electrification goals.
  - **2023:** Construction for selected locations began in residential areas with limited off-street parking.
  - **Early 2024:** Public launch for 25 Level 2 curbside public charging stations.
  - **Late 2024:** By August, they installed 58 public Level 2 curbside EV chargers across 31 locations.
  - **2025:** City Light transitioned the EV charger management system to [ChargePoint](#) from Shell Recharge.<sup>30</sup>
- **Partnerships & Collaboration: Highlight any partnerships that played a significant role in the initiative's success**
  - Seattle City Light manages program design, implementation, and public engagement. As the city's publicly owned electric utility, City Light played a central role in aligning the program with broader climate and mobility goals.
  - The Department of Transportation (SDOT) supported the identification and permitting of curbside locations, ensuring safe installation within rights-of-way and non-disruptive traffic flows. This supported effective integration within the existing city infrastructure.
  - The Office of Sustainability & Environment (OSE) provided equity-centered data through the [Racial and Social Equity Composite Index](#) to prioritize charger placement in historically marginalized neighbourhoods to address economic disparities and improve access to EVs.
  - Community-based organizations also advised on local needs, supported outreach, and helped to build trust in the program among residents.
  - ChargePoint supplied and managed the Level 2 Charging stations and provided real-time data and insights related to use and reliability. They were the lead partner for technical expertise to support and monitor performance and evaluate feedback for expansion.
- **Funding & Resources: Provide an overview of how the project was funded and what resources were leveraged.**
  - The program is funded by user fees and public incentives. Drivers pay to utilize chargers at \$0.21/kWh.<sup>31</sup> For multifamily home installations, City Light offers to cover 100% of project costs (max \$50,000) for installation of Level 2 charging stations at buildings.<sup>32</sup>

<sup>30</sup> [Read more](#)

## 5. OUTCOMES & IMPACT

- **Key Achievements: Summarize the major outcomes of the project**
  - As of 2024, Seattle City Light manages a public charging network that includes 25 fast chargers and 60 Level 2 chargers across its service area. They recently installed curbside Level 2 chargers to serve residents who depend on street parking.
  - Some of the most frequently used locations see up to six charging sessions daily, delivering enough electricity annually to support more than 150,000 miles of electric vehicle travel.
  - The success of the program has led to an expansion goal adding additional charging stations targeting equity groups and underserved communities.
- **Metrics & Data: Include any relevant statistics, survey results, or qualitative feedback that demonstrate impact.**
  - Recipients of initial locations for charging stations from City Light were encouraged to respond to an online survey to voice opinions on the charger, provide feedback, and ask questions.
  - In Seattle, [53% of residents are renters](#), and 35% live in multifamily buildings.
- **Equity Metrics: Where there are specific equity metrics included in the project. How was the equity driven language determined.**
  - The program used Seattle's [Racial and Social Equity Composite Index](#) to prioritize charging station locations in areas with high concentrations of BIPOC and low-income residents to ensure these populations had equitable access to EV infrastructure.
  - The equity-driven language was informed by the community engagement and consultation process with nonprofits and community organizations, emphasizing shared decision-making with residents to ensure the project met their needs. Further, City Light and Seattle initiatives. For example, [City Light's commitment to energy equity](#) and the [Transportation Electrification Strategic Investment Plan](#). Both emphasize feedback from communities that experience the most health and environmental harm from fossil fuel use. It guides the utility's efforts to expand EV charging infrastructure equitably across Seattle's service area.

## 6. INDICATORS & MEASUREMENT

- **Climate Equity Indicators are key metrics used to ensure that climate action initiatives are inclusive, effective, and equitable. These indicators help track progress, identify disparities, and guide decision-making to ensure that benefits are shared across all communities, particularly those most vulnerable to climate impacts.**
  - Monitoring the utilization rates of charging stations in equity-priority areas allows City Light to assess the effectiveness of the program in meeting the transportation needs of underserved communities. High utilization rates in these areas indicate that the infrastructure is being used and is beneficial to the residents.

<sup>31</sup>One kWh provides a typical EV with enough energy to travel over three miles. The fees offset installation costs and cover electricity, operations, maintenance, and repair costs.

<sup>32</sup>[WA incentives program.](#)

- The program focuses on providing near-home charging solutions for renters. This approach addresses the unique challenges faced by residents without off-street parking options.
- **Describe the key metrics used to measure equitable outcomes in the project (e.g., access to resources, participation rates from marginalized communities, distribution of benefits).**
  - % of chargers in equity zones (per Racial & Social Equity Index)
  - Quantitative survey data from renters/multifamily housing residents
- **Describe the Climate Equity Indicators used to position the project within the municipality (ex. Affordability, Health and Safety etc.)**
  - Cost per site
  - Maintenance ease
  - Lessons learned from permitting and installation feedback
- **Low-Carbon Impact: Define how the project's success in emissions reductions and sustainability efforts was tracked.**
  - Number of chargers installed
  - # of monthly sessions
  - Energy delivered (kWh)
  - Operational uptime
  - **Emissions:**<sup>33</sup>
    - Estimated GHG emissions avoided
    - Improvements to air quality (modelled via EV transition rates)
- **Social & Economic Benefits: Outline measurable improvements such as job creation, energy savings, or health benefits.**
- **Data Collection Methods: Describe the approach used to gather and analyze data to ensure transparency and accuracy.**
  - **Data Collection Methods:**
    - Charger usage data (via ChargePoint and other software providers)
    - Community surveys and feedback forms
    - Geospatial mapping to track equity zone coverage
    - Public engagement workshops and listening sessions
- **Lessons Learned & Best Practices**
- **Success Factors: Key conditions or strategies that contributed to the project's success**
  - Seattle City Light is a municipally owned utility, meaning it can take leadership on public-benefit programs like curbside charging. Unlike private utilities, it can prioritize equity, community needs, and environmental justice over profit, in alignment with other city-led equity targets and strategies. It also has greater flexibility in piloting innovative projects quickly.

<sup>33</sup>In line with [Seattle's GHG inventory metrics](#)

- City Light uses real-time data tracking and regulates community feedback surveys to inform equity outcomes and evaluate the program.
- **Replicable Tools & Resources: Templates, toolkits, frameworks that could support future projects**
  - [Racial and Social Equity Composite Index](#): census tract-based tool to aid in the identification of City planning, program and investment priorities.
  - [Mapping tool for charger locations](#).
  - [Seattle's open data portal](#).
  - [Transportation Strategic Investment Plan](#)
- **Additional Resources: Project Website or Report Links**
  - Seattle's [Equity & Environment Initiative](#)
  - [City Light's Transportation Electrification Strategic Investment Plan](#)
  - [Racial and Social Equity Composite Index](#)
  - [Racial Equity Toolkit](#).
  - [Fleet Electrification Program](#)
  - [City Light Curbside Charging Update 2024](#)
  - [Level 2 charging comms 2023](#)
  - [Multifamily EV Charging Program](#)
  - [Public Charging Program FAQ](#)
  - [Health benefits in Seattle from EV's](#)
  - [City Light's commitment to energy equity](#)

## 1. CASE STUDY OVERVIEW: ANURIQJUAQ NUKKIKSAUTIIT PROJECT<sup>34</sup>

- **Municipality / Department Leading (if applicable):** Nunavut Nukkiqsautiit Corporation (NNC), an Inuit-owned entity under the Qikiqtaaluk Corporation (QC)<sup>35</sup>
- **Location:** [Sanikiluaq](#), Nunavut
- **Project Duration:** 2017–present

## 2. PROJECT BACKGROUND & OBJECTIVES

- **Context & Rationale: Describe the problem or challenge the project aimed to address. Provide a region-specific analysis to contextualize the issue—why and how is this challenge affecting the particular community or area? Consider including relevant local data, policy gaps, or historical factors that contribute to the problem.**
- **Context:**
  - Sanikiluaq is Nunavut’s southernmost community and has approximately 1000 residents.<sup>36</sup> Like every community in Nunavut, Sanikiluaq is entirely dependent on fossil fuels for meeting heat and electricity demands. Annually, the community consumes ~four million litres of diesel, leading to high energy costs and GHG emissions, environmental and biodiversity risks, and logistical challenges associated with fuel transportation to remote locations. It creates economic vulnerabilities due to fluctuating fuel prices also poses risks to public health with increased air pollution.
  - The proposed Arctic-rated wind turbine and battery energy storage system are designed to meet the Hamlet’s peak electricity demand of around 750 kW, enabling periods of diesel-off operation when QEC’s system allows. Working together, the wind turbine, battery storage, and existing diesel generators at QEC’s power plant will ensure a safe and reliable electricity supply for Sanikiluaq.
  - The Anuriqjuak Nukkiqsautiit Project was initiated to address these challenges by harnessing the region’s abundant wind resources. In March 2017, a meteorological tower was installed in Sanikiluaq to assess wind potential, revealing an impressive wind resource suitable for energy generation.
  - The federal government has committed to eliminating diesel-powered electricity in remote communities by 2030 and provides funding and capacity-building support. However, energy policy and utility regulation fall under territorial jurisdiction. This misalignment creates major barriers for Inuit organizations and other Indigenous-led projects, which may be ready to lead but are stalled by slow or inconsistent territorial processes.

<sup>34</sup> Anuriqjuak means Big Wind in Inuktitut. The project was named by elementary school kids.

<sup>35</sup> QEC is wholly owned by the Government of Nunavut and is responsible for generating and distributing electricity to all 25 communities across the territory.

<sup>36</sup> Sanikiluaq is the southernmost community in Nunavut, situated in the Belcher Islands in southeastern Hudson Bay, approximately 150 kilometres (93 miles) off the coast of Québec. It is the only year-round settlement in this vast archipelago, which comprises 1,500 islands spanning 3,000 square kilometres (1,158 square miles).

- The Canadian federal government has committed to eliminating diesel-powered electricity in remote communities by 2023.<sup>37</sup> However, the country largely lacks the infrastructure required to ensure communities are connected to the grid, and there are many institutional barriers for communities wanting to implement their own projects. Despite the federal government offering funding for clean energy projects in that progress this goal, energy policy and utility regulation fall under Nunavut’s territorial jurisdiction. This misalignment creates major barriers for Inuit organizations and other Indigenous-led projects, which may be ready to lead but are stalled by slow or inconsistent territorial processes. This led to project as NNC waited for QEC to launch its Independent Power Producer (IPP) program.
- Eventually, in 2023, the Anuriquak Nukkiksautiit Project became the first initiative in Nunavut to sign an Energy Power Agreement (EPA) under Qulliq Energy Corporation’s (QEC) newly established IPP program. The IPP program provides a regulatory framework that enables communities and organizations to generate clean electricity and sell it back to the territorial grid. See more about the delays and related challenges below.
- **Regional Analysis:**
  - Sanikiluaq’s unique geographical and socio-political context makes it an ideal candidate for renewable energy initiatives. Geographically, its isolation and the challenges associated with fuel transportation underscore the need for local energy solutions. Socially, the community’s commitment to environmental stewardship aligns with the principles of sustainable energy.
  - The project is spearheaded by the Nunavut Nukkiksautiit Corporation (NNC)<sup>38</sup>, a 100% Inuit-owned entity under the Qikiqtaaluk Corporation (QC).<sup>39</sup> NNC’s regional-community ownership model ensures that the community has a leading role in the project’s development, maximizing local benefits and facilitating access to financing. This structure ensures that the Anuriquak Nukkiksautiit Project aligns with Inuit values and promotes community involvement, fostering energy sovereignty and local economic development.<sup>40</sup>
  - Sanikiluaq has long been recognized as a leader in innovation around mobilizing Inuit Qaujimajatuqangit (IQ) for environmental stewardship, including receiving international recognition through a United Nations award for Voices from the Bay.<sup>41</sup>
- **Project Goals: Outline the key objectives of the initiative, how did they measure success and what metrics were used.**
  - Reducing diesel dependence: With the installation of a 1,000 kW wind turbine and 500 kW of battery storage, the Anuriquak Nukkiksautiit Project’s target is to offset approximately 50% of Sanikiluaq’s diesel consumption for electricity generation.

<sup>37</sup> There are more than 200 remote communities in the country that aren’t connected to the electricity grid

<sup>38</sup> NNC’s mission is “to lead Qikiqtani’s clean energy transition in partnership with our communities, establishing sustainable clean energy developments that foster economic, social and environmental benefits.”

<sup>39</sup> [QC is the](#) Inuit Birthingright Development Corporation under the Qikiqtani Inuit Association. It was created in response to the desire and opportunity to develop renewable energy in partnership with communities across the Qikiqtani Region.

<sup>40</sup> [Read more about the project & region.](#)

<sup>41</sup> Qaujimajatuqangit is Inuit Traditional knowledge.

- Promote economic development: Hire local employees and create training programs for long-term employment opportunities in the renewable energy sector.
  - The community-ownership model ensures that benefits such as employment and revenue stay within the community.
- Progress the clean energy transition and reduce GHG emissions and environmental risks associated with diesel fuel.
- Success metrics include: The percentage reduction in diesel consumption, the number of local jobs created, and the amount of greenhouse gas emissions avoided. Community feedback provides additional qualitative data and metrics for impact evaluation.
- **Target Audience: Identify the communities or groups engaged in the project**
  - The primary beneficiaries of the project are the residents of Sanikiluaq, who will experience improved energy security, cost-savings, reduced air pollution, and economic opportunities. By focusing on community ownership and involvement, the project ensures that local needs and perspectives are central to its development and implementation. The Anuriquak Nukkiksautiit Project serves as a model for other remote communities in Nunavut or northern regions facing similar challenges, demonstrating the feasibility and advantages of transitioning to renewable energy through community-led initiatives.

### 3. ENGAGEMENT STRATEGIES & TECHNIQUES

- **Outreach Methods: Describe the methods used to reach and engage target groups. Highlight which methods were most successful and why.**
  - Community Consultations: Public meetings were held to discuss renewable energy developments, allowing residents to voice their opinions and concerns.<sup>42</sup>
  - The [SIKU app](#) facilitated community-driven research and monitoring, enabling residents to contribute to environmental stewardship efforts. The SIKU app is designed to bridge traditional knowledge and modern technology. It serves as a vital tool for Indigenous-led environmental monitoring, knowledge sharing, and community engagement across the Arctic.<sup>43</sup> In the context of the Anuriquak Nukkiksautiit Project, SIKU plays a pivotal role in community outreach and engagement:
    - **Educational Tool:** The app serves as an resource, teaching users about environmental stewardship, traditional practices, and the implications of climate change, thereby enhancing community awareness and involvement.
    - **Empowering Local Stewardship:** By enabling residents to actively participate in environmental monitoring, SIKU fosters a sense of ownership and responsibility towards local renewable energy projects.
    - **Data Tracking:** Residents can track and upload their own environmental data in real time, related to the project and other environmental factors in the region.

<sup>42</sup> [Consultation news article.](#)

<sup>43</sup> The [SIKU app—short for siku, meaning “sea ice” in Inuktitut](#)—is a mobile and web-based platform developed by the Arctic Eider Society in collaboration with Inuit communities. Designed to bridge traditional knowledge and modern technology, SIKU serves as a vital tool for Indigenous-led environmental monitoring, knowledge sharing, and community engagement across the Arctic.

- The project utilizes the [Qikiqtait Centre](#) as a hub for knowledge exchange, training, and coordination among various community organizations.
  - The Qikiqtait Centre is set to be the first net-zero building in Nunavut.
- **Equity Considerations: How did the project ensure participation from underserved communities**
  - The project emphasized Inuit leadership. NNC is 100% Inuit-owned so the community led all project phases and ensured that decisions reflected local interests. By incorporating Inuit Qaujimajatuqangit into project planning and execution, the initiative respected and upheld cultural practices.
  - Training programs at the Qikiqtait Centre targeted at youth, equipping them with skills in renewable energy, traditional crafts, and environmental monitoring.
- **Key Challenges & Solutions: Outline any barriers to engagement and how they were addressed**
  - **Challenge:** QEC began developing the Independent Power Producers (IPP)<sup>44</sup> program in 2019, but it wasn't announced until September 2022. This delay hindered NNC's ability to initially progress with the Anuriquak Nukkiksautiit Project, as they required an Energy Purchase Agreement to move forward.<sup>45</sup> Without the IPP program in place, QEC was unwilling to discuss technical requirements or pricing, stalling NNC's procurement of necessary equipment like wind turbines and battery storage. There were also further delays in 2023 once the program was announced.
    - NNC's director, Heather Shilton, expressed frustration over the lack of dialogue with QEC, which contributed to the project's stagnation, despite support from regional Inuit organizations and local leaders.
    - Because QEC refused to discuss technical requirements or pricing before finalizing the IPP program, NNC was unable to purchase or configure turbines and battery storage systems, despite having community support and a clear development plan. The delay meant higher costs, uncertainty in supply chains, and loss of momentum at a critical time.
  - **Solution:** NNC and project partners, including Qikiqtaaluk Corporation (QC), engaged directly with the Government of Nunavut and QEC to advocate for the finalization and release of the Independent Power Producers (IPP) policy. This persistent engagement helped ensure the program was eventually launched, and that progress would accelerate to land a deal. Further, the project leveraged its local leadership and Inuit ownership to enable culturally grounded decision-making. This helped bridge institutional gaps and foster mutual understanding between technical teams, community members, and utility stakeholders. NNC also did many interviews and released press updates about the delays, which increased public pressure.

<sup>44</sup>The Independent Power Producer (IPP) program is a regulatory framework that allows third parties—such as community organizations, Indigenous governments, or private companies—to generate electricity and sell it to the grid, typically through a formal contract with a utility.

<sup>45</sup>Also known as Power Purchase Agreement

- **Challenge:** Initial community meetings revealed a lack of understanding about renewable energy projects and a misunderstanding of potential projects being consulted on. Community members hold a deep connection to traditional lands, and therefore were extremely careful about potential for new land use for modern energy technology.
- **Solution:** NNC hired Firelight Group, a First Nations-owned consulting firm and enhanced communication efforts through educational sessions, local media engagement, and hands-on demonstrations to clarify objectives and benefits. Firelight and NNC set out to interview people to better understand the history of the area and land use for hunting, fishing, travel and camping. This also gave community members another chance to voice possible concerns. Further, the project being 100% Inuit-owned, helped the initiative maintain cultural relevance and increase community trust.
- **Challenge:** Remote communities like Sanikiluaq often face significant challenges in accessing training opportunities and infrastructure necessary for community development. These limitations hinder the ability to implement sustainable initiatives, such as renewable energy projects, and restrict opportunities for local capacity building and economic diversification.
- **Solution:** The Qikiqtait Centre serves as a hub for training, research, and community gatherings, supporting the creation of the Qikiqtait marine and terrestrial protected area. The Centre is a significant achievement in advancing renewable energy infrastructure, reconciliation, and community capacity building in the North. It facilitates Inuit-led stewardship towards international biodiversity targets and sustainable development goals.

## 4. IMPLEMENTATION & EXECUTION

- **Project Phases: Break down project timeline and key milestones**
  - **2015:** Project ideation among community members and NNC
  - **2017:** Installation of a meteorological tower in Sanikiluaq to assess wind energy potential.
  - **2021:** Completion of feasibility studies and initiation of early-stage planning for renewable energy infrastructure.
  - **2022:** Nunavut Nukkiqsautiit Corporation (NNC) held a public meeting to explore which areas would be best for renewable energy development in the area.
  - **2022:** QEC had ministerial approval to accept applications under IPP program<sup>46</sup>
  - **2023:** Signing of an Energy Purchase Agreement between Nunavut Nukkiqsautiit Corporation (NNC) and Qulliq Energy Corporation, marking the first agreement of its kind in Nunavut.
- **Partnerships & Collaboration: Highlight any partnerships that played a significant role in the initiative's success**
  - Nunavut Nukkiqsautiit Corporation (NNC) is a subsidiary of Qikiqtaaluk Corporation (QC).<sup>47</sup> NNC leads project development and implementation with guidance from the Qikiqtani Inuit Association (QIA) to ensure strategic alignment with Inuit values. In addition to NNC, QC owns and operates Qikiqtaaluk Environmental Inc., a subsidiary providing environmental and marine research services leveraged for environmental impact consideration.

<sup>46</sup> According to NNC director Heather Shilton

<sup>47</sup> The Qikiqtaaluk Corporation (QC) is the Inuit birthright development corporation for the Qikiqtani region of Nunavut, Canada. It was established in 1983 by the Qikiqtani Inuit Association (QIA) to manage and grow Inuit-owned business ventures, support economic development, and generate employment opportunities for Inuit beneficiaries under the Nunavut Land Claims Agreement.

- The Qulliq Energy Corporation (QEC) collaborated with NNC to establish the EPA, facilitating the integration of renewable energy into the local grid, and the Government of Nunavut offered support in regulatory processes and community engagement.<sup>48</sup>
- Firelight Group, a First Nations-owned consulting firm, provided community-based research to support environmental and socio-economic assessments rooted in Indigenous knowledge systems and participatory methods. Their involvement helped ensure cultural values were embedded in all stages of project planning and monitoring.
- **Funding & Resources: Provide an overview of how the project was funded and what resources were leveraged.**
  - NCC has a history of receiving federal funding for the development of their energy projects, including funding from Crown-Indigenous Relations and Northern Affairs Canada (CIRNAC) and CanNor.<sup>49</sup>
  - They also leverage in-kind support and participation from residents, enhancing community ownership and capacity building.
  - As the parent organization of Nunavut Nukkiksautiit Corporation, QC's structure ensures revenue from the Anuriquak Nukkiksautiit Project are reinvested locally. Revenue of this project will be shared with the community through a Community Enhancement Fund, set up by NNC. Keeping decision-making within Inuit communities supports long-term self-determination and sustainable economic development. As a locally-led Inuit project, NNC can sell excess electricity to QEC and generate revenue to reinvest in local development.<sup>50</sup>

## 5. OUTCOMES & IMPACT

- **Key Achievements: Summarize the major outcomes of the project**
  - The project has progressed through multiple phases, including the installation of a meteorological tower in Sanikiluaq in 2017 to assess wind energy potential, completion of feasibility studies, and the signing of an Energy Purchase Agreement in 2023 between NNC and QEC.
  - It was a big win in 2025 to receive additional funding in 2025 to commence the next phase of the project.
  - This was the first Energy Purchase Agreement of its kind signed by QEC, marking a historic step for community-owned energy projects and enabling IPPs to sell renewable energy into Nunavut's grid.
- **Metrics & Data: Include any relevant statistics, survey results, or qualitative feedback that demonstrate impact.**
  - The SIKU app has been utilized for documenting observations related to sea ice conditions, wildlife sightings, and weather patterns, supporting geotagged posts for precise tracking of environmental changes over time in the region and community.

<sup>48</sup> The EPA sets out the terms and conditions upon which NNC will sell and QEC will purchase renewable energy when it can be absorbed by the grid. QEC's obligations to provide safe, reliable, affordable energy are maintained and honoured throughout the agreement, to ensure electricity prices do not increase for customers. The term of the agreement is 25 years from the start of commercial operation.

<sup>49</sup> Investment announcements [here](#), [here](#) and [here](#).

<sup>50</sup> QEC is wholly owned by the Government of Nunavut and is responsible for generating and distributing electricity to all 25 communities across the territory.

- **Equity Metrics: Where there are specific equity metrics included in the project. How was the equity-driven language determined.**
  - The project incorporates Inuit Qaujimajatuqangit (IQ) principles, such as Inuuqatigiitsiarniq (respecting others), Tunnganarniq (fostering good spirit), and Piliriqatigiinni (working together), ensuring that the initiative aligns with Inuit societal values and promotes inclusivity.<sup>51</sup>
  - Efforts have been made to engage residents in environmental monitoring and decision-making processes, fostering a sense of ownership and ensuring that the benefits of the project are equitably distributed. With the project being 100% Inuit-led and embedding practices of IQ into project planning and execution, the initiative respected and upheld cultural practices.

## 6. INDICATORS & MEASUREMENT

- **Describe the key metrics used to measure equitable outcomes in the project (e.g., access to resources, participation rates from marginalized communities, distribution of benefits).**
  - **Access to Resources:** The Qikiqtait Centre provides facilities for training, research, and community gatherings, ensuring that resources are accessible to all community members.
  - **Participation Rates:** Community engagement initiatives, such as training programs and environmental monitoring activities, have been implemented to encourage participation from marginalized groups, including youth and elders.
  - **Distribution of Benefits:** The project's emphasis on local employment and capacity building ensures that the economic and social benefits are equitably distributed within the community.
- **Describe the Climate Equity Indicators used to position the project within the municipality (ex. Affordability, Health and Safety etc.)**
  - **Affordability:** By reducing reliance on diesel fuel, the project aims to lower energy costs for the community, enhancing affordability and economic resilience.
  - **Health and Safety:** Reduced air pollution.
  - **Local Ownership:** Community governance structures foster self-sufficiency and reduce reliance on federal or territorial systems. For Indigenous communities, this approach is especially valuable as it minimizes oversight from colonial institutions and supports the advancement of self-determination.
  - **Cultural Preservation:** The integration of traditional knowledge and practices into the project supports the preservation of Inuit culture and fosters intergenerational knowledge transfer.
  - **Community Empowerment:** Implement a regional-community ownership model to ensure community leadership and maximize local benefits.

<sup>51</sup> IQ principles

- **Low-Carbon Impact: Define how the project’s success in emissions reductions and sustainability efforts was tracked.**
  - **Emissions Reductions:** The project aims to significantly reduce Sanikiluaq’s carbon emissions by transitioning from diesel fuel to renewable energy sources, contributing to climate change mitigation efforts, tracked by:
    - Baseline diesel consumption assessment
    - Community-based monitoring through the SIKU app and the Qikiqtaaluk Environmental Inc. monitoring and data collection practices
    - Energy generation capacity
- **Social & Economic Benefits: Outline measurable improvements such as job creation, energy savings, or health benefits.**
  - **Job Creation:** Project construction and the establishment of the Qikiqtaik Centre and associated renewable energy projects have created employment opportunities in areas such as research, environmental monitoring, and facility operations.
  - **Energy Savings:** By reducing dependence on imported diesel fuel, the community anticipates long-term cost savings and enhanced energy security.
  - **Health Benefits:** Improved air quality resulting from decreased diesel emissions contributes to better respiratory health outcomes for residents.
- **Data Collection Methods: Describe the approach used to gather and analyze data to ensure transparency and accuracy.**
  - Community members use the SIKU app to record environmental data pertinent to renewable energy initiatives, such as wind patterns and seasonal changes, informing project planning and implementation.
  - Scientific Research and environmental monitoring, combined with traditional knowledge.
- **Replicable Tools & Resources: Templates, toolkits, frameworks that could support future projects**
  - Indigenous off-diesel capacity [initiatives](#)
  - [Lessons learned and relevant frameworks for clean energy capacity building in remote communities](#)
  - [Frameworks and tracking tools from USDN to center equity in design](#)
  - Data sovereignty and Indigenous knowledge mobilization tools such as [SIKU](#)
  - **Energy Purchase Agreement or Power Purchase Agreement Templates from:**
    - [QEC](#)
    - [QEC Generation agreement](#)
  - [Pembia’s report and recommendations for QEC to invest more in NU projects](#)
- **Additional Resources: Project Website or Report Links**
  - Anuriqjuak Nukkiksautiit project [page](#) (QC website)
  - Nunavut Nukkiksautiit Corporation [Website](#)
  - Nunavut Nukkiksautiit Corporation [page](#)
  - Sanikiluaq Municipality [website](#)
  - QEC [website](#)

- [Press release](#) for EPA with QEC
- Energy purchase agreement [article](#)
- Environmental Health News SIKU [Article](#)
- [QEC Delays](#)
- Energy Purchase [Agreement](#) signed
- [NNC Community Consultation challenges](#)
- \$4M in federal funding for NNC - [2022](#)
- \$6M in federal funding for NNC - [2025](#)
- Research literature on the concept of [Inuit Qaujimajatuqangit](#)
- Pembia [report](#) on agreement rates in NU
- [Additional context on difficulties and challenges facing diesel-reliant communities switching to clean energy from the CBC](#)
- CBC [article](#) on major policy shift

## 1. CASE STUDY OVERVIEW: ALTERNATIVE RESOURCE ENERGY AUTHORITY (AREA)

- **Location:** Towns of Berwick, Antigonish, and Mahone Bay, Nova Scotia, Canada
- **Municipality / Department Leading (if applicable):** Inter-municipal corporation (Municipalities of Berwick, Antigonish, and Mahone Bay)
- **Project Duration:** 2014–present

## 2. PROJECT BACKGROUND & OBJECTIVES

- **Context & Rationale:** Describe the problem or challenge the project aimed to address. Provide a region-specific analysis to contextualize the issue—why and how is this challenge affecting the particular community or area? Consider including relevant local data, policy gaps, or historical factors that contribute to the problem.
- **Context:**
  - The Alternative Resource Energy Authority (AREA) was established with the core mission of enabling small municipalities in Nova Scotia to develop, own, and operate renewable energy projects. The initiative emerged as a collaborative response to energy, climate, and capacity challenges faced by small towns, with clear goals tied to decarbonization, cost savings, and local empowerment. It is a great example of municipal action on climate change in rural and small-town contexts. It collaborates with Nova Scotia Power, Provincial Departments, and groups like QUEST Canada to expand learning and capacity across the region.
  - Nova Scotia is composed largely of small, rural towns that may not have the capacity to invest independently in large-scale energy infrastructure. AREA's work is rooted in community ownership and democratized energy governance and keeps energy revenue within the community rather than flowing to external shareholders, which is especially important in small towns with limited tax bases. This supports local reinvestment, job creation, and ensures ratepayer accountability which promotes economic and energy equity.
  - AREA leans into Nova Scotia's strengths, including tight-knit communities, local utility control, and supports broader goals to decarbonize through community-based low-carbon innovation. Much of AREA's success is related to a focus on practicality and locally rooted energy solutions, and the emphasis on affordability is attractive to Nova Scotians.
  - AREA's projects, such as the newly announced phase 3 for the Ellerhouse Wind farm, accelerate progress on Nova Scotia's renewable energy target of 80% renewable by 2030.<sup>52</sup>

<sup>52</sup> QEAs outlined in the Environmental Goals and Climate Change Reduction Act.

- **Regional Analysis:**
  - AREA is uniquely suited to address the region's energy challenges, rural infrastructure needs, and community priorities. Nova Scotia's energy system is heavily regulated, with limited pathways for community-owned energy to participate in the provincial market. Unlike many provinces, Nova Scotia has a legacy of municipally owned electric utilities, giving towns more direct control over their energy decisions. AREA enables municipal collaboration, where small towns with limited capacity, like Berwick, Mahone Bay, and Antigonish, can pool resources to access renewable energy at scale. AREA builds on this model by creating regional-scale cooperation while maintaining local ownership.
  - Nova Scotia is one of Canada's most coal-reliant power grids, creating a major barrier to decarbonization. AREA and its partner towns have shifted most of their electricity supply to the wholesale market to cut costs and lower emissions. As a result, AREA now sources over 84% of its electricity from clean energy.
  
- **Project Goals: Outline the key objectives of the initiative, how did they measure success and what metrics were used.**
  - **Accelerate the Transition to Clean Energy**
    - Develop and operate renewable energy projects (primarily wind and solar) to reduce dependence on coal-fired generation in Nova Scotia and contribute to the province's broader GHG reduction and climate action targets. Support the transition to consumer EV adoption through collaboration on federally supported charging stations.
  - **Enable Local, Community Ownership**
    - Ensure that municipalities retain ownership over their energy infrastructure and the associated benefits and strengthen local control over energy decisions.
  - **Deliver Cost Savings to Municipal Utility Customers**
    - Use participation in the wholesale electricity market to reduce long-term electricity costs for residents and businesses and pool resources between towns (Berwick, Mahone Bay, Antigonish) to achieve economies of scale.
  - **Build Municipal Capacity**
    - Establish AREA as a model for inter-municipal cooperation in the energy sector and share governance, project oversight, and strategic planning across towns to reduce duplication of effort and build expertise.
  
- **Target Audience: Identify the communities or groups engaged in the project**
  - AREA's renewable energy projects target residents and businesses in the three partner towns of Antigonish, Berwick, and Mahone Bay. Local governments and municipal leaders are key stakeholders, helping guide the initiative to meet community needs and sustainability goals. The projects also engage energy-conscious citizens, educational institutions, and civic organizations that support clean energy adoption.

### 3. ENGAGEMENT STRATEGIES & TECHNIQUES

- **Outreach Methods: Describe the methods used to reach and engage target groups. Highlight which methods were most successful and why.**
  - AREA regularly engages community members through local meetings to allow residents and customers to ask questions, provide feedback, and stay informed about energy initiatives.<sup>53</sup> These sessions fostered trust and gave the public a voice in decision-making.
  - Town meetings and direct communication through municipal newsletters were particularly effective. In smaller towns, where community networks are strong, in-person engagement and regular updates from trusted local leaders helped build buy-in and long-term support.
  - Partner towns like Berwick and Mahone Bay used their official websites, bulletins, and newsletters to share updates, explain project benefits, and post key documents. These platforms served as accessible hubs for information.
  - Local media and press are leveraged by AREA to reach other communities across rural Nova Scotia, and educational signage at project sites (e.g., solar farms and the Ellershouse Wind Farm) helped inform passersby and served as tools for community engagement and learning.
  - Beyond generation, AREA offers services to other Nova Scotia municipalities such as project management, technical support for solar installations and energy efficiency consultation. This was an additional touch point with the community and increased awareness of ongoing projects.
- **Equity Considerations: How did the project ensure participation from underserved communities**
  - AREA ensured ample opportunity for community members to engage and provide feedback, and leveraged outreach strategies already familiar to rural residents in small towns - such as town meetings and local bulletins.
- **Key Challenges & Solutions: Outline any barriers to engagement and how they were addressed**
  - **Challenge:** Small towns like Berwick, Mahone Bay, and Antigonish often lack the financial and technical capacity to develop renewable energy projects independently.
  - **Solution:** The formation of AREA as a shared municipal corporation allowed the towns to pool financial and human resources.  
This collective model enabled investment in projects like the Ellershouse Wind Farm and regional solar installations, which would have been difficult to pursue individually. Further, AREA used a shared-cost financing structure and partnered with independent developers to reduce risk and access funding, while leveraging provincial and federal funding programs and infrastructure grants.
  - **Challenge:** Nova Scotia's energy system is heavily regulated, with limited pathways for community-owned energy to participate in the provincial market.
  - **Solution:** AREA built strong working relationships with provincial regulators and utility partners to align its projects with Nova Scotia Power's grid requirements. It also leveraged access to the wholesale electricity market to reduce costs and increase autonomy.

<sup>53</sup> [Antigonish Town Hall, Mahone Bay Town Hall](#)

- **Challenge:** Limited awareness of clean energy in rural communities can lead to skepticism. Residents unfamiliar with renewable energy technologies tend to be more cautious about their impacts and hesitant about development.
- **Solution:** AREA and its member towns held community meetings, open houses, and site tours to build transparency and trust. By showcasing tangible benefits related to affordability and municipal ownership AREA was able to generate support from local community members.
- **Challenge:** With multiple municipalities involved, ensuring fair project siting and benefit-sharing was essential to maintaining collaboration.
- **Solution:** AREA created a transparent governance structure, with equal representation from each member town. Project benefits (like energy credits and revenue) are equitably shared based on agreed formulas, promoting mutual accountability and long-term partnership.

#### 4. IMPLEMENTATION & EXECUTION

- **Project Phases: Break down project timeline and key milestones**
  - **2014:** AREA is founded by the towns of Berwick, Mahone Bay, and Antigonish
  - **2015:** Ellershouse Wind Farm Phase I: Construction begins in summer 2015; the wind farm starts supplying power in December, with all four turbines operational by January
  - **2017:** Launch of the Community Solar Program
  - **2018:** 10-turbine Ellershouse Wind Farm was completed on time and on budget
  - **2019:** Began development on the Mahone Bay Community Solar Garden
  - **2020:** AREA conducts a Request for Proposals (RFP) and selects [Potentia Renewables Inc.](#) to develop the Ellershouse III and Panuke Lake wind projects
  - **2020:** HOME program launches.
  - **2024:** [Mahone Bay Community](#) Solar Garden completed
  - **2025:** Construction to begin on Ellershouse III
- **Partnerships & Collaboration: Highlight any partnerships that played a significant role in the initiative's success**
  - AREA exemplifies successful inter-municipal collaboration in the renewable energy sector, showing how small towns can effectively pool resources, share risk, and co-develop large-scale clean energy projects that would be unattainable individually.
  - The organization maintains strong partnerships with key stakeholders, including Nova Scotia Power, the Department of Natural Resources and Renewables, and Efficiency Nova Scotia, to align policy, support grid integration, and ensure technical feasibility. It has also received support from programs like Low Carbon Communities and leverages Municipal Climate Change Action Plans to guide its initiatives.
  - AREA actively engages with networks such as QUEST Canada and the Nova Scotia Federation of Municipalities (NSFM) to share best practices and expand regional clean energy capacity through knowledge exchange.
  - To support home energy efficiency, AREA partners with [Green Foot Energy Solutions](#) and CUA to deliver the HOME Program, which offers heat pump installations and accessible financing. For utility-scale renewable projects, AREA collaborates with private developers like Potentia Renewables and GOLDBECK SOLAR, alongside provincial regulators, to enable project delivery and scale impact.

- **Funding & Resources: Provide an overview of how the project was funded and what resources were leveraged.**
  - **PPA and shared-cost structures:**
    - AREA used a shared-cost financing structure and partnered with independent developers (e.g., Potentia Renewables, GOLDBECK SOLAR) to reduce risk and access funding.
    - They have a 25-year PPA with Nova Scotia Power for solar projects.
  - **Federal and provincial funding:**
    - On behalf of the three partner towns, Mahone Bay, Berwick, and Antigonish, AREA applied for funding for three Community Solar Projects as the general contractor for the projects. For example, in July 2021 federal and provincial funding was granted for all three of the Towns' solar garden projects (providing a combined 73% of the cost of the projects).
    - AREA has received support from the Low Carbon Communities Program and Municipal Climate Change Action Plans.
  - **Revenue and ROI:**
    - Returns on investment from ongoing energy projects support local services and infrastructure. Revenue from energy projects goes back into the community, such as revenue generated from the Ellershous Wind Farm project that directly supports municipal budgets. For example:
      - Solar projects delivered through the Community Solar program generate revenue for 20 rural communities with a 25-year power purchase agreement with Nova Scotia Power.
      - For the third phase of the Ellershous project in 2025, new revenue for local economy will include municipal taxes, landowner payment and bolstering local economic activities.

## 5. OUTCOMES & IMPACT

- **Key Achievements: Summarize the major outcomes of the project**
  - **Ellershous Wind Farm (Phase I & II):**
    - This wind project generates 23.5 MW of wind energy with 10 turbines, powers 6,500 homes. It supplies more than 40% of the electricity required for the three member towns, and reduces 40,000+ tonnes of GHG emissions annually. All revenue from this project supports municipal budgets and decreases the reliance on ratepayer increases.
  - **Community Solar Program: Solar for Everyone:**
    - AREA has supported the installation of PV systems for 20 rural municipalities across Nova Scotia, beginning in 2017 with 1.5 MW of commercial solar for community buildings. These projects delivered revenue to rural communities with a 25-year power purchase agreement with Nova Scotia Power.
    - In 2020, they expanded to build 9 MW of community solar gardens across the three partner towns of Berwick, Antigonish, and Mahone Bay. These projects create equitable opportunities for businesses and residents to access solar energy regardless of income or home-ownership status.
  - **Customer programs:**
    - **HOME Program**
      - AREA's HOME Program supports residents in installing and financing heat pumps, with

no upfront costs and accessible maintenance and service calls.

- **EV Adoption**

- In collaboration with the Province of Nova Scotia, AREA gathered significant funding from the Federal Government to accelerate progress on electrifying transportation. The program will support the installation of 102 charging stations.

- AREA's municipal utilities (Berwick, Mahone Bay, and Antigonish) now source more than 84% of their electricity from renewable sources—remarkable progress in Nova Scotia, one of Canada's most carbon-intensive provincial grids.
- AREA has demonstrated that small municipalities can lead large-scale clean energy projects, retaining ownership and ensuring local benefits stay within their communities. Organizations like QUEST Canada reference AREA's governance structure as a best-practice model for community-led clean energy, offering a replicable framework for municipalities across Canada

- **Metrics & Data: Include any relevant statistics, survey results, or qualitative feedback that demonstrate impact.**

- 500 jobs created
- \$22M (CAD) in community solar under construction
- \$51M (CAD) in total assets
- 6,700 utility customers
- 192k + GHG saved in tCO<sub>2</sub>e<sub>q</sub>
- 300k Annual profit to Nova Scotia towns through the Community Solar program, in partnership with the Provincial Government
- The Ellerhouse Wind project delivers benefits to the community through an annual wind farm tax of \$100,000 and a yearly donation to the Ellerhouse Wind Farm Society of \$10,000.<sup>54</sup>
- **Projected impact for the 2025 Ellerhouse III project:**<sup>55</sup>
  - Employment Opportunities during Construction: 100 to 150 direct and indirect jobs created during construction
  - Employment Opportunities during the Operation Phase: 3-5 full-time technicians
  - Local Labour: The Project will target a minimum of 40% participation of local labour and Indigenous peoples through these phases
  - Climate Benefits: The Project will contribute to meeting Nova Scotia's renewable energy target of 80% renewable by 2030, as outlined in the Environmental Goals and Climate Change Reduction Act, by producing enough energy to power approximately 20,650 Nova Scotian homes

<sup>54</sup> AREA has a commitment with the residents of Ellershouse to provide sponsorship donations for projects that directly enhance vital community spaces. This agreement has formed The Ellershouse Wind Farm Society and donations to the society have bought new playground equipment, sponsored summer camps, sponsored skating sessions, donations towards the Brooklyn District Elementary School, West Hants Middle School and Avon View High School to support their breakfast and lunch programs.

<sup>55</sup> [Learn more](#)

- **Equity Metrics: Where there are specific equity metrics included in the project. How was the equity-driven language determined.**
  - AREA has no formal equity framework, like many community/development projects in larger urban centers, but equity considerations have been embedded in the governance structure, project benefits, and access to participation. The projects are municipally owned through AREA, giving towns like Mahone Bay, Berwick, and Antigonish direct control over energy decisions. This local governance ensures that revenues and decision-making power remain in the community, benefiting residents rather than private shareholders. The structure itself stems from grassroots input and local climate strategies that emphasize inclusion and affordability.
  - The language and outreach strategies reflect those of Nova Scotia’s municipal utilities and broader provincial and national commitments to just transitions. Partner towns reference Nova Scotia’s Sustainable Development Goals Act and Canada’s net-zero targets, which guide inclusive energy practices.

## 6. INDICATORS & MEASUREMENT

- **Climate Equity Indicators are key metrics used to ensure that climate action initiatives are inclusive, effective, and equitable. These indicators help track progress, identify disparities, and guide decision-making to ensure that benefits are shared across all communities, particularly those most vulnerable to climate impacts.**
- Though AREA does not publish formal equity dashboards, it embeds equity in practice through metrics tied to municipal ownership, local economic benefit, participation, and cost savings. AREA was founded to have a collaborative decision-making and governance structure to ensure the three partner towns are equally represented, to ensure the needs of their communities are met.
- **Describe the key metrics used to measure equitable outcomes in the project (e.g., access to resources, participation rates from marginalized communities, distribution of benefits).**
  - # of community utility customs
  - Reduction in electricity costs for residential customers.
  - Public engagement strategies such as town hall meetings and open houses were designed to be accessible and inclusive. Success was measured by attendance rates at public engagement events and feedback collected from diverse community members.
  - Location and dispersion of clean energy projects across the three member towns (Mahone Bay, Berwick, Antigonish).
- **Describe the Climate Equity Indicators used to position the project within the municipality (ex. Affordability, Health and Safety etc.)**
  - The transition to wholesale market access and renewable energy generation has reduced overall electricity costs.
  - **The main equity indicator for AREA and related projects is affordability, tracked by indicators listed above, as well as:**
    - \$ (CAD) in total benefits for towns and utilities
    - \$ (CAD) in assets (municipally owned)

- Municipal property tax is paid to the community
- CLC payments during the PPA contract
- **Low-Carbon Impact: Define how the project's success in emissions reductions and sustainability efforts was tracked.**
  - Amount in CAD of solar and wind under construction
  - # of homes powered
  - tCO2eq saved or GHG emissions reduction in tonnes
  - Annual energy produced (in MWh)
  - Uptime and maintenance performance
  - Contribution to peak load reduction
- **Social & Economic Benefits: Outline measurable improvements such as job creation, energy savings, or health benefits.**
  - # jobs created
  - Percentage of energy generated and controlled locally (vs. externally procured).
  - Ratepayer benefits: Cost savings passed on to residents, especially low- and middle-income households.
- **Replicable Tools & Resources: Templates, toolkits, frameworks that could support future projects**
  - [Nova Scotia's Municipal Climate Change Action Plan \(NCCAP\)](#) is a framework for municipalities in Nova Scotia to address climate change through both adaptation and mitigation measures, showcasing step-by-step guides for creating local climate or energy transition plans.
  - [QUEST Canada, case studies for smart grids in Atlantic Canada.](#)
  - [Research and frameworks for municipal energy projects](#)
  - AREA's governance structure among Berwick, Mahone Bay, and Antigonish.
- **Additional Resources: Project Website or Report Links**
  - [Alternative Resource Energy Authority \(AREA\)](#)
  - [NS Gov announcement](#)
  - [Community Solar Program](#)
  - [HOME heat pump program](#)
  - Mahone Bay Community Solar Garden [page and tracking](#)
  - [Town hall - Mahone Bay](#)
  - [Ellerhouse Wind Farm](#)
  - [Ellerhouse video](#)
  - [QUEST Canada](#)
  - [Potentia Renewables announcement](#)
  - Mahone Bay GHG reduction plan, [2023 update](#)
  - [AREA Spotlight](#)
  - [GOLDBECK announcement](#)
  - [NS Municipal Energy Learning](#)

# FOLLOW-UP QUESTIONS FOR MUNICIPALITIES

*Based on case study research.*

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## VANCOUVER

- Can you describe the mechanisms in place to integrate equity evaluation into the City's budget and procurement processes? How are these mechanisms linked to measurable outcomes?
- How does the City navigate potential differences in departmental readiness or capacity for equity work? Beyond allowing departments to develop their own strategies aligned with the framework, what supports are in place to ensure consistent implementation across departments?
- Can you share examples of how disaggregated data from the equity dashboards have directly influenced policy or service delivery? Are there any specific examples related to climate initiatives?
- How will long-term cultural and institutional shifts initiated through the equity framework be measured, beyond tracking training metrics?
- Can you provide more details about the relationship protocol signed with the Squamish Nation and the staff-to-staff summits? How are these summits facilitated and initiated, and how are the learnings integrated into the equity framework?

## PORTLAND

- After the 2022 auditor's report, what has the trust rebuilding process looked like? What strategies is PCEF using to balance the urgency of climate action from grassroots organizations with the often-slower administrative processes of municipal funding and bureaucracy?
- How is PCEF tracking the long-term impacts related to workforce development? The apprentice-hour and contracting targets are clear, but how are outcomes measured beyond project completion, and is there an understanding of whether the jobs created are sustainable?
- As of April 2025, there is a proposal to increase the CES to 1.33%, with additional revenue directed to Portland's general fund rather than exclusively to PCEF. Has this proposal prompted discussions about the City's role in shaping and adapting voter-approved funding to meet evolving community needs? How will PCEF be impacted?
- In the evaluation process, how does PCEF ensure that smaller and first-time applicants are not disadvantaged when competing with more established non-profits—beyond offering application training and information sessions?

## PHILADELPHIA

- What mechanisms are in place to ensure that rebates or incentives for landlords are actually passed down as benefits to renters, rather than resulting in increased rent or tenant displacement?
- Can you share specific examples of how insights from BIPOC and energy-burdened community members were incorporated into the final strategy design? Additionally, could you clarify how the participatory process is translated into tangible outcomes that go beyond consultation?
- How is the City tracking the effectiveness of community-based outreach methods? What metrics are being used to evaluate the impact and accountability of the partner network approach?
- What are the City's contingency plans if federal funding sources—such as IRA or LIHEAP—are reduced or eliminated in future years? Is there a strategy to diversify funding and maintain program momentum?
- How does the City plan to sustain progress toward the strategy's goals beyond Mayor Parker's term, particularly if future leadership shifts priorities? Are there institutional safeguards, cross-departmental ownership structures, or policy mechanisms in place to ensure accountability regardless of political changes?

## SEATTLE

- What early insights and behavioral trends have emerged from user data since transitioning to ChargePoint, and how is this data informing future charger placement and expansion plans?
- What challenges has the City faced in permitting or siting chargers in high-priority areas like Rainier Valley and Beacon Hill, and how are these being addressed?
- Are there plans to expand multilingual or culturally-specific outreach and engagement strategies?
- How is City Light coordinating with affordable housing providers and developers to integrate curbside and multifamily EV charging into long-term urban planning and housing development?
- How does City Light define and evaluate EV infrastructure as an equity investment—particularly in ways that go beyond income-based measures—and how are goals such as mobility access and public health outcomes being communicated and received by residents, communities, and stakeholders?
- Given the significant delays caused by the slow rollout of QEC's IPP program, what specific advocacy strategies or pressure points proved most effective in pushing QEC and the territorial government to finalize the IPP policy and sign the EPA? Are there lessons learned that could support other Inuit or Indigenous-led clean energy projects navigating similar regulatory bottlenecks?

## SANIKILUAQ

- NCC received significant federal funding for hydro projects and other developments in Nunavut aimed at reducing diesel dependency. Is NCC leveraging any of that federal funding, either directly or through QC, for this project? If so, could you provide details on which programs or federal funding streams were accessed, and how they contributed to project milestones?
- What were the key insights or concerns that emerged from the Firelight Group's engagement and interviews with community members regarding traditional land use? How did these findings influence the final siting of the wind turbine or shape the project's ongoing community engagement strategy?
- How is the Qikiqtait Centre—set to be the first commercial net-zero building in Nunavut—supporting long-term capacity building for renewable energy in Sanikiluaq, particularly for youth and local employment? Are there plans to expand training programs?
- With the EPA signed, what are the immediate next steps for implementation? Has procurement begun for the wind turbine and battery systems, and what timelines are you working toward for construction and integration with the existing diesel infrastructure?
- In your experience, which outcomes have been the strongest motivators for community members to engage in clean energy projects like the Anuriqujuk Nukkiksautit Project - improved health and environmental conditions, job creation and economic opportunity, or increased local ownership and self-determination?
- Recognizing that many Indigenous and Inuit worldviews hold environmental health, public health, and community well-being as deeply interconnected and inseparable (rather than viewing equity and climate as separate lenses) how might we thoughtfully design data and impact measurement systems for community-led energy projects that honor these holistic perspectives? What effective practices can help ensure these understandings are upheld while also meeting external reporting and funding obligations?

## NOVA SCOTIA (MAHONE BAY, BERWICK, ANTIGONISH)

- Can you share specific examples of how AREA projects—such as the Ellerhouse Wind Farm or Community Solar Gardens—have impacted local communities in terms of economic benefits and job creation? Have these projects contributed to shifts in cultural attitudes toward clean energy?
- In what ways has AREA's governance model, which emphasizes equal representation and shared decision-making among member towns, supported collaboration and addressed challenges related to project siting or benefit-sharing?
- What strategies or approaches have proven most effective in engaging local residents and businesses in AREA's renewable energy initiatives, and how has community feedback shaped current and future projects?
- Looking ahead, what opportunities or challenges do you foresee for AREA and its municipalities in expanding renewable energy infrastructure while maintaining affordability and equity for residents?

- Beyond power sales to Nova Scotia Power under the PPA, what is the transactional structure of the program? How do local residents contribute financially—such as through dividends or fees—and do local governments make direct investments to support decarbonization? How are these financial contributions structured to ensure the program’s sustainability and community benefit?
- How was a genuine sense of community ownership cultivated beyond in-person meetings and town outreach? What tools, written communications, or other outreach methods were used to engage residents and build trust in what may be a new technology for many?
- What has been the primary motivator for community engagement—local ownership, affordability, or another factor?
- Can you provide more details on how your programs integrate with electrification goals of the province, such as EV infrastructure, and AREA’s HOME Program?

## FOLLOW UP RESEARCH ON CASE STUDIES

**Identify a compelling case study within Vancouver’s Equity Framework, ideally one that highlights a specific success in climate action or notable advances in home energy efficiency improvements.**

- Equity and Sustainability Integration with the Planning, Urban Design and Sustainability (PDS) Department. In 2024, the Equity Office collaborated with the PDS team to embed equity directly into climate mitigation and adaptation planning. This included the development of an Equity Asset Map to identify the underserved areas most vulnerable to climate impacts. This also included an evaluation framework for climate projects that integrate both equity and emissions reduction goals, and hiring an Equity and Reconciliation Planner to bridge planning and equity across departments.

**How can we frame a strategy like the Energy Poverty Alleviation Strategy in a way that goes beyond the current focus on affordability and housing supply?**

- Philadelphia avoided isolating affordability by framing energy poverty as an interconnected issue of climate resilience, economic opportunity, racial justice, and public health. Their strategy connects home retrofits and solar adoption to broader goals like job creation, health equity, decarbonization, and empowering BIPOC communities and renters. They look at trade-offs and the lived experience of folks living in energy insecurity, and focusing on the energy burden. They focus on renters and the aging housing market, investing in scalability and existing programs and capacity.

**Health is a major cross-cutting issue in our seven research areas. Can we explicitly highlight how health outcomes are integrated into the Energy Poverty Alleviation Strategy and position this integration as a transferable takeaway for other jurisdictions?**

- Health and safety are explicit drivers of their strategy, “heat or eat” is cited as a key dilemma. The City’s Health Equity Dashboard tracks energy burden against asthma rates, mental health, and housing instability.
- “Built to Last” prioritizes retrofits that address both energy and health harms: e.g., mould, indoor air quality, and extreme temperature.
- The city ties public health savings (e.g., fewer ER visits for heat stroke or asthma) to retrofit outcomes.

**How are equity investments—like EV infrastructure—being framed by City Light? What’s the tension between viewing EVs as an equity solution versus questioning their appropriateness, especially when equity doesn’t always equate to poverty?**

- Seattle’s strategy recognizes that equity encompasses more than just poverty alleviation. With over half of City Light’s customers renting their homes, many in multifamily dwellings, access to off-street parking is limited, hindering EV adoption. By installing public Level 2 chargers at curbside locations, the program aims to provide equitable access to EV charging for residents who cannot utilize off-street parking. This approach acknowledges that even affluent renters may face transportation and mobility-related inequities due to infrastructure limitations.

**How is the City Light acknowledging that even affluent renters may experience transportation and mobility-related inequities, especially in areas underserved by public infrastructure? Even affluent renters can experience associated inequities related to transportation and mobility. Can we explicitly highlight how this program approaches equity by focusing on access to zero-carbon tools and infrastructure as a fundamental equity consideration?**

- The program specifically targets areas where residents rely on street parking, often due to the absence of driveways or garages in older single-family homes, apartments, and houseboats. By providing curbside charging options, Seattle City Light enhances mobility options for renters, irrespective of income levels, who might otherwise be excluded from the benefits of EV ownership.
- Access to transportation is not just about mobility; it’s about justice, opportunity, and inclusion. Without equitable transit systems, disparities in health, income, education, and environmental quality are exacerbated. Equitable public transit is a foundational tool for building more just, resilient, and sustainable communities.
- Communities experiencing poor air quality and health disparities (often low-income neighbourhoods and communities of colour) stand to gain the most from the transition to electric transportation. Strategic placement of publicly available Level 2 charging stations in these areas not only promotes EV adoption but also supports broader environmental justice goals by reducing local air pollution and related health risks. Equity in EV infrastructure goes beyond simply addressing income or poverty.

**In BC, utilities like BC Hydro often consider upgrades to street lighting infrastructure when evaluating EV charging solutions. Is there a similar integration in this project with City Light—are streetlight updates being leveraged to enable equitable access to EV charging? How is that being bundled into the larger infrastructure plan?**

- In addition to EV infrastructure, Seattle City Light manages several programs related to street lighting, focusing on modernization, maintenance, and community engagement. These initiatives aim to enhance safety, energy efficiency, and community involvement in the city's lighting infrastructure.<sup>1</sup>

**In BC, similar projects to AREA are often led by municipalities that operate their own utilities. Is that the case in this context as well? If not, how is this model structured, and how transferable is it to jurisdictions with different utility governance?**

- Although AREA's 3 member towns operate their own local distribution utilities, they often purchase wholesale electricity from Nova Scotia Power or directly from the wholesale market. NS Power remains the province's main generation and transmission utility, so municipal utilities often rely on NS Power's transmission network and generation resources. With AREA's renewable energy projects, such as wind and community solar, there is coordination to integrate these new sources into the local distribution system and the wider provincial grid managed by NS Power. NS Power is regulated by the Nova Scotia Utility and Review Board (NSUARB), which also oversees municipal utilities to some extent, ensuring fair rates and reliable service across the province.
- When there is surplus power produced by AREA's wind turbines or community solar projects, that excess electricity is exported and sold back to the provincial grid, which is managed by Nova Scotia Power. This arrangement allows AREA to generate revenue from the sale of electricity and helps feed clean energy into the broader provincial grid, supporting decarbonization goals. This kind of net metering and power purchase relationship between municipal utilities (like AREA) and NS Power is typical in Nova Scotia's utility landscape. It enables local utilities to benefit financially and environmentally from renewable generation, while NS Power balances supply and demand across the province.

<sup>1</sup>[Streetlight maintenance, Magnolia Pilot Streetlights, 2nd Avenue Extension South Streetlight Upgrades. They also offer a rental streetlight program for residents and business owners who wish to install additional lighting on private property.](#)

# ENGAGING LOCAL GOVERNMENTS ON CLIMATE ENERGY PROGRAMS IN UNDERSERVED COMMUNITIES

## 1. BACKGROUND & CONTEXT

**Key Question:** Can you share an overview of your role and your local government’s approach to climate and energy programs?

**Subtopics:**

- Your role and responsibilities in local government
- Overview of climate energy programs and target markets
- Key climate and energy priorities for your municipality
- Current approach to low-carbon resilience and electrification

## 2. EXPERIENCE WITH ELECTRIFICATION & LOW-CARBON RESILIENCE

**Key Question:** What has been your municipality’s experience with electrification and low-carbon resilience initiatives?

**Subtopics:**

- Implemented projects and key learnings
- Successes and challenges faced
- Policy and regulatory enablers or barriers

## 3. DEFINING AND IMPLEMENTING EQUITY

**Key Question:** How does your local government define and operationalize equity in climate and energy programs?

**Subtopics:**

- Definition of “underserved communities” in your context
- Approach to equity in climate initiatives
- Evolution of equity-focused engagement
- Decision-making process on terminology and its impact
- Challenges in aligning definitions with community needs
- programs may not be equity-driven, but they may be promoted in an equitable manner. E.g., an incentive program may not be limited to equity-deserving groups, but efforts may be made to promote it to those groups.

## 4. CASE STUDIES & BEST PRACTICES

**Key Question:** Can you share a successful equity-driven climate initiative from your municipality? Or, perhaps initiatives that were not necessarily driven by equity, but where engagement (communication) with underserved communities was attempted?

### Subtopics:

- Key factors contributing to success
- Lessons learned from implementation
- Frameworks or models used for inclusive participation
- Role of community partners and organizations
- Strategies for ensuring accessibility and inclusivity
- Mechanisms for incorporating ongoing community feedback
- Even if engagement wasn't targeted specifically to underserved communities, did they try to assess whether such engagement was still successful at reaching underserved communities.
- the goal is to establish the level and the type of needs of local government, unsuccessful examples/failures, as well as barriers encountered
- How was success measured

## 5. MEASURING AND TRACKING EQUITY

**Key Question:** How does your government measure and track equity in climate energy programs?

### Subtopics:

- Key equity metrics and evaluation methods
- Prioritization strategies for underserved communities
- Ensuring lived experiences are captured in data
- Examples of successful equity measurement
- Challenges in tracking and reporting equity outcomes
- Role of government staff in building trust
- Addressing barriers like language, literacy, and digital access

## 6. FUNDING AND SUPPORT NEEDS

**Key Question:** What are the key funding and resource challenges in advancing climate programs in an equitable manner?

### Subtopics:

- Challenges in increasing awareness, access, and implementation of low carbon resilience and electrification programs among underserved communities

- Strategies for equitable resource allocation
  - if the resources (time/budget) for increasing awareness, access, and implementation of low carbon resilience and electrification programs among underserved communities are being allocated early in the project (e.g., is it integrated in program/project planning, budget)
- Securing additional funding for equity-focused initiatives
- Policy and funding barriers
- Balancing competing priorities while maintaining equity goals
- Additional resources, training, or policy changes needed
- Advice for other local governments integrating equity into climate work

## **CLOSING & FOLLOW-UP**

- Is there anything else you'd like to share that we haven't covered?
- Any examples of case studies or best practice projects that you've heard about that might be helpful for this project?

