



Integrating Equity into MTI Implementation

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Prepared by:

Sepideh Rezania, Unrooz Solutions

Rachel Good, CalMTA

Resource Innovations
719 Main Street, Suite A
Half Moon Bay, CA, 94019
(888) 217-0217
info@calmta.org

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1 Purpose

Market transformation initiatives (MTIs) typically begin with market research to validate or identify strategic interventions needed to remove market-level barriers and leverage opportunities to accelerate adoption of a technology, practice or service. Once an MTI moves into the market deployment stage, those interventions must be translated into specific strategies, tactics and activities that will then be implemented in the market to overcome the identified market barriers. This guide is written for the implementation phase of an MTI and should be used directly by market transformation administrators and any third-party contractors who help to carry out that work.

The guidance focuses on how to deploy equity-centered interventions in practice. This includes working with partners, influencing market actors, and embedding equity into implementation tactics.

This guide complements the [Applying an Equity Lens in MTI Development](#) document, which covers research, logic model development, and intervention strategy design. Together, the two guides provide a full picture from design through market deployment.

This is an evolving document. As we learn from the process of implementing MTIs, new insights will be added.

2 Core implementation principles

The following principles, which build on insight from environmental and social justice (ESJ) community experts (e.g., CalMTA's Equity Sounding Board and participants in listening sessions), inform the overall MTI implementation approach as well as specific work with market actors (e.g., manufacturers, distributors, retailers, installers) and community partners when deploying strategic market-level interventions:

- **Trust is earned, not assumed.** When engaging with community partners, market actors, or any other entity, keep in mind that trust cannot be built through a single interaction or transaction. Trust comes from relationships, consistency, and accountability.
- **Meet communities where they are.** Design implementation activities based on needs and priorities defined by communities themselves, and adapt those activities to reflect language, culture, historical context, regional location, and preferred timing/format.
- **Build allyship.** Work with partners and market actors who listen to impacted communities, show up consistently, and invest time in relationships so trust can grow.



- **Transparency builds credibility.** In communication with market actors, program partners, and community members, the implementation team should clearly and openly speak to costs, timelines, potential challenges, and what stakeholders can expect throughout the initiative. Clear communication upfront reduces confusion, helps mitigate harmful impacts, and supports the central goal of building trust.
- **Sustain relationships.** It is important to maintain a consistent presence and follow-up when engaging community partners in MTI implementation. Ongoing communication and follow-up activity demonstrates commitment and helps cultivate the desired long-term trust.
- **Tailor approaches.** Communities are not monolithic. Implementation approaches should be shaped by needs and priorities identified by people in the community, with attention to cultural, geographic, historical injustice, social and economic context.

3 Considerations When Working with Partners

Because MTIs work at the market level, engaging partners and market actors is essential to ensure the desired equity outcomes of an initiative reach community members. The following guidance addresses specific types of partnerships and the implementation activities they support.

3.1 Partner with community-based organizations (CBOs).

When partnering with CBOs to support MTI education, awareness-building, installations, or outreach, engage them as true partners through collaborative design. Involve them early in shaping outreach and engagement activities, and seek their guidance on the local social landscape, trusted networks, and opportunities to reach ESJ communities at scale. Be clear and honest from the start about who you are, what you are asking for, who is funding the work, the project timeline, and what the MTI's exit strategy and end states are. Roles, responsibilities, decision-making, and accountability should be clearly defined so the partnership is transparent and workable for everyone involved. Partnership agreements should reflect shared ownership and CBOs should be compensated fairly for their time and expertise.

3.2 Tap into informal networks.

When looking for community partners to support MTI awareness building or outreach, implementers should seek out partners in informal networks and not just more formal entities like utility programs or government agencies. Connect with community elders, faith leaders, promotoras¹, small business associations, and other trusted connectors. Use these networks to

¹ A predominantly Latina women-led workforce, promotoras are *puentes de la comunidad*, community bridges. They are critical community partners who have a unique ability to build relationships and connect low-income and historically under-resourced communities with public health and social services information, local resources, health care, social health, education, housing and legal systems. [Vision y Compromiso | Who Are Promotoras?](#)



inform outreach strategies, build credibility, and reach community members that might not be engaged through formal networks. Implementers can consider partnering with CBOs to help bridge connection with informal networks.

3.3 Set expectations and provide tools for installers and contractors.

When engaging workforce, education, and training (WE&T) organizations to address MTI workforce development needs, make sure the contractor training programs emphasize the need to provide clear pre-installation guidance, quality work, and post-installation follow-up. Where possible, support the development of practical tools, templates, and protocols that help contractors implement these expectations consistently in the field, including customer communication materials and clear plans for addressing equipment failure or other installation-related issues. Work with programs that engage contractors to reinforce these expectations through contracts, standard templates, customer feedback surveys, and other quality assurance processes that help monitor implementation success. Implementation teams should also look for opportunities to expand access to workforce pathways by encouraging contractor participation in youth training and hiring efforts, especially for young people from communities that have historically had less access to these opportunities.

Implementation teams should also align workforce development activities with market readiness. In early-stage markets, where technologies are still emerging and demand is not yet steady or predictable, it is important to clearly communicate expectations, risks, and likely timing so training efforts do not create disappointment or leave workforce partners and participants with investments that cannot yet be put to use. In some cases, it may be more appropriate to rely initially on manufacturers or other specialized actors for installation until demand is strong enough to support broader workforce expansion.

3.4 Coordinate with other programs to minimize harm and maximize alignment.

When coordinating with external programs that provide leverage and influence the same market, such as incentive programs, financing programs, or complementary services, work together to align on practices that minimize unintended harm and leverage investments. This may include:

- Encouraging partners to use MTI-aligned clear, consistent and accessible messaging across programs so customers and community partners are not receiving mixed messages
- Reviewing program eligibility requirements to identify and address barriers that may limit equitable access
- Sharing market-level learnings that can help partner programs make incentives, financing, or services more accessible and appropriately targeted to reach intended communities



- Coordinating on timelines, intake processes, or bundled service offerings to create a holistic experience in the market and streamline participation requirements
- Being clear about what the MTI seeks to accomplish, what support is needed from other programs, what reciprocal support the MTI can provide, and where responsibilities begin and end.

4 Considerations for equitable outreach and messaging

Market transformation interventions often rely on installation contractors, CBOs, retailers, property management firms, and other market actors to disseminate educational and awareness-building messaging or to conduct outreach for activities such as recruiting participants for demonstration projects, field studies, or other deployment efforts. Encouraging these market actors to use the following best practices when supporting MTI implementation can help foster a more equitable outreach and engagement.

4.1 Ensure market actors use trusted messengers.

When developing contracts or partner agreements for outreach activities, work with local partners to ensure they are responding to the unique needs and priorities of the communities they serve. This may include requiring that staff can support in-language, culturally sensitive outreach or engaging CBOs to deliver messaging directly. It may also include hiring from local communities to develop marketing content. Trusted messengers are more effective at building credibility and reaching community members who may be hesitant to engage through unfamiliar channels.

4.2 Provide ready-to-use messaging tools around health, safety, and non-energy benefits.

Develop plain language, multilingual templates that market actors can use in their outreach. Equip them with messaging that centers on the benefits of the focus technology, including health and safety benefits such as cleaner air, reduced asthma triggers, and comfort, in addition to economic or energy-saving benefits. Providing these tools reduces the burden on partners and helps ensure consistency across outreach efforts.

4.3 Use language that is culturally and linguistically appropriate.

Develop multilingual outreach materials and go beyond direct translation into transcreation. Make sure the examples and visuals used reflect the cultural context of the intended audience. Avoid jargon, acronyms, or technical terms without clear explanation. Test all materials with



community partners or representatives from the target audience to confirm clarity and respectfulness.

4.4 Emphasize transparency about costs, trade-offs, and potential challenges.

Equip workforce entities and external programs with the information they need to convey the potential bill impacts, installation complexities, or operational differences of an MTI's focus technology. This honest communication gives customers agency to make informed decisions about the right solution for their household, builds trust, and helps avoid negative experiences that could undermine broader market adoption.

4.5 Support a multi-generational approach to messaging deployment.

Work with schools or education boards, faith groups, and community organizations to ensure MTI messaging reaches and is received by different generations. Equip market actors with strategies to engage youth, parents, and elders through varied channels. For example, for youth this may include school assemblies and partnerships with student clubs or after school programs. For parents, use family take-home packets (especially in elementary schools), childcare center drop-off materials, or local resource fairs. For elders, leverage faith-based bulletins, large-print mailers, community-center listening sessions, and in-person engagement through trusted gatherings.

4.6 Use a mix of outreach channels, recognizing that no single method will reach everyone.

Social media can be a powerful tool and should be used where it makes sense, but it should be paired with in-person outreach and traditional methods like mailers, since not everyone has reliable access to WiFi, social media, or digital platforms, and may not be proficient in navigating these sites or tools. Keep messaging simple, practical, and focused on what is most meaningful to people. When possible, outreach should highlight real-world success stories or incorporate small demonstrations in the community to make technologies feel real and relatable.

5 Ensuring quality installation & follow-up

MTI plans often include workforce development interventions designed to build a trained, skilled base of contractors who can install the focus technology. These interventions should also seek to ensure that ESJ communities have access to that workforce, as many rural and lower-income areas report a lack of trained local contractors. In MTI market deployment, workforce development activities are typically carried out by established WE&T entities or other market actors, such as manufacturer representatives. The MTI can influence these actors by encouraging them to adopt



the following practices in their installation of MTI focus technologies, as well as installations that occur directly through an MTI, such as demonstration projects or field studies.

5.1 Encourage clear pre-installation communication.

Work with market actors to provide contractors with templates or checklists to explain timeline, space needs, electrical requirements, and any needed home modifications before work begins. Clear upfront communication helps set expectations and reduces the likelihood of surprises that can undermine trust or lead to project delays.

5.2 Encourage quality installation and follow-up support.

Work with WE&T providers to encourage them to include market-informed guidance for quality installation in contractor trainings and offer follow-up support to customers. It is also important to empower consumer to understand what warranty terms and post installation follow-up process are. In addition, evaluation activities should consider inclusion of metrics that track not only whether the technology was installed, but also whether consumer satisfaction with the quality of the installation persists over time. This feedback can be used to refine contractor training guidance for WE&T providers.

Encourage incentive programs, manufacturers, and contractors to develop and communicate plans for equipment failure, especially in remote or Tribal communities that may have less ready access to a skilled workforce. These plans should include clear and transparent communication to consumers about warranty terms and post-installation follow-up processes.

6 Create feedback loops with ESJ communities

Organizations and individuals that understand the lived experience of ESJ communities, such as CBOs or groups engaged specifically to support market transformation work (e.g., CalMTA's Equity Sounding Board), are a critical resource to consult throughout implementation. We encourage engagement with these resources at key moments to suggest improvements that will support an MTI's equity goals or identify any potential unintended impacts from implementation activities:

- **During implementation planning.** Connecting with ESJ partners early on can yield important insight to help shape the initial draft MTI Implementation Plan and position these partners to productively review and comment on the plan before it is finalized.
- **Before launching outreach.** Implementation teams should share the planned sequence of outreach targets and draft messaging, materials, and engagement plans for feedback. This should also include information about the initial targets of outreach and the desired impact of engagement efforts to ensure these assumptions work from an equity perspective.



- **When conducting demonstration projects/field studies.** ESJ community members and organizations should be engaged as partners to find the best sites for demonstration. Implementation teams should present early findings, challenges, and lessons learned, and should ask for input on adjustments moving forward.
- **When unintended consequences arise.** If the MTI encounters unexpected barriers or negative impacts associated with a focus technology/practice or implementation tactics, consult ESJ partners for perspective, guidance and potential course-correction rather than responding in a vacuum.
- **At major program milestones.** Before scaling up demand aggregation efforts or other significant market activities, implementation teams should share preliminary results with ESJ partners and discuss opportunities to ensure equity remains centered.
- **Create a mechanism for feedback.** Implementation teams should create a mechanism that allows ESJ partners to address targeted questions as they arise (e.g., the consulting hours reserved for CalMTA's Equity Sounding Board), such as reviewing contractor training curricula, refining incentive structures, or troubleshooting specific community engagement challenges.

7 Learning & course correction

Market transformation implementation is an active process of discovery. Implementation teams will work closely with the program/strategy managers and the embedded evaluation² contractors that track the MTI's progress toward established market progress indicators (MPIs) to make informed decisions about implementation strategy adjustments. This includes tracking both quantitative indicators, such as units sold and installation quality, and qualitative data from interviews and case studies that provide insight into consumer or contractor experience with a focus technology. From an equity perspective, early feedback from partners, contractors, and communities should be used to course-correct quickly if desired impacts are not achieved. ESJ community representatives (such as CalMTA's Equity Sounding Board) and other external equity-focused entities can also be engaged to review evaluation findings, help interpret emerging challenges, and suggest actionable refinements to implementation activities. Understanding the evaluation process as an integrated component of MTI deployment positions implementation teams to refine strategies in real time and strengthen equitable outcomes over the life of the initiative.

By embedding these practices, implementers can ensure equity remains central to MTIs as they evolve throughout market deployment.

² Embedded evaluation is third-party evaluation that happens alongside implementation, rather than only at periodic intervals, helping teams learn in real time and make informed course corrections.