

APPENDIX 2: Diversity, equity and inclusion

This appendix to Energy Trust's 2023 Annual Report to the Oregon Public Utility Commission and Energy Trust Board of Directors provides information on progress to meeting the goals identified in [Energy Trust's Diversity, Equity and Inclusion Plan](#). The purpose of Energy Trust's DEI Plan is to ensure customers who have historically been underserved by Energy Trust's programs or who have not directly benefitted from clean energy solutions have meaningful and equitable access to Energy Trust services. This includes but is not limited to people of color, people with low incomes and people living in rural areas.

The plan has five goals and describes desired outcomes for each goal to describe the future state Energy Trust hopes to achieve. In 2023, staff identified metrics to track progress to meeting these goals and outcomes for 2023. Staff previously sought feedback from external stakeholders and community members on possible metrics and used their insights to arrive at the ones included in the plan.

The DEI Plan identifies multi-year goals, and the 2023 metrics tell only part of the story. They are not intended to demonstrate Energy Trust's comprehensive efforts to realize all the desired outcomes associated with each of the DEI Plan goals, although they provide insights into some portion of Energy Trust's DEI efforts. As Energy Trust's activities evolve based on community engagement, and as its capabilities and approaches to tracking data improve, metrics and reporting may evolve too to become more robust and tied to emerging areas of focus.

Goal 1: Increase representation and readiness

Outcomes:

- Diverse perspectives and ideas contribute to the creation of equitable solutions to support all communities in realizing the benefits of clean energy solutions.
- Energy Trust has significant resources for BIPOC, low-income and rural community organizations, individuals and businesses to engage with Energy Trust as a form of restorative justice to address the historical disparities in investment in these organizations by Energy Trust since our inception in 2002.
- Energy Trust staff engage diverse communities in a respectful, effective and culturally relevant and responsive manner.

Metric:

- Number of cultural awareness trainings and events attended by Energy Trust staff.

Status as of 2023:

- In a survey, staff members self-reported collectively attending more than a dozen voluntary cultural awareness trainings and events in 2023. These included:
 - an antiracism training hosted by Empress Rules Equity Consulting and Rose City Alliance on ways to identify and dismantle white supremacy
 - one-on-one mentoring with the leader of an environmental justice organization to learn about strategies for sharing power and building organizational capacity
 - Behavior, Energy & Climate Change conference sessions on promoting equity in utility programs and lessons for energy equity
 - a Native American Youth and Family Center event to learn about issues facing the Native American community and meet with advocates

- a virtual training on promoting cultural humility in the workplace hosted by the Center for Nonprofit Management
- an Ecotrust training on how green energy projects can disregard tribal land rights and community needs
- a Jewish Family and Child Services meeting to learn about social work services provided to disadvantaged communities and aging populations
- Energy Trust outreach staff attended more than 200 events hosted by other organizations to connect with diverse groups; many events were focused on environmental justice communities. Events included those hosted by Asian and Pacific Islander Community Coalition of Oregon, Hacienda CDC, Venezuelan Voices in Oregon, Affiliated Tribes of the Northwest Indians, Eastern Oregon Women’s Coalition, Community Energy Project, and community and cultural events such as Juneteenth celebrations, Medford Multicultural Fair, Good in the Hood, Portland Argentinian Festival and Wallowa Woodland and Watersheds.
- Energy Trust hosted a four-part training series for directors and senior managers on ways to promote inclusion in the workplace and a one-time training for all staff on how to recognize and respond to unconscious biases.
- Energy Trust’s DEI Book Club hosted four discussions in 2023. Two were on the books “Caste: The Origins of Our Discontents” that compares American racism to caste systems around the world and “Braiding Sweetgrass” that describes how Indigenous knowledge works with scientific understanding of the natural world. Two other discussions were on the miniseries “The 1619 Project” on how slavery and its legacy are at the center of the American experience.

Goal 2: Shift and share leadership and power

Outcomes:

- Community members have influence in the design and implementation of Energy Trust programs to serve historically underserved communities.
- Communities and community-based organizations have significant ownership and agency in identifying and delivering responsible clean energy solutions co-created with Energy Trust.

Metric:

- Number of community members who participated in Energy Trust projects, initiatives or advisory groups to provide input and influence program design. A community member is defined as a person who is not Energy Trust, Program Management Contractor or Program Delivery Contractor staff. (Community members may be compensated for their participation.)

Status as of 2023:

- As part of the Solar Ambassadors pilot to recruit and train community members to promote solar energy, Energy Trust engaged nearly 100 households on the benefits of solar, cost considerations and the process of purchasing and installing it. In post engagement surveys, participants reported being interested in the environmental and financial benefits of solar but that upfront costs and lack of affordable financing made it inaccessible.

- The Existing Buildings program incorporated community feedback into the program design through a network of 10 community-based liaisons who engage with small business owners and represent their feedback to staff. In 2023, liaisons assisted the Existing Buildings program with updating program incentive forms, supported Contractor Development Pathway listening sessions, attended trade ally forums and events and reviewed marketing materials.
- Four community members served on Energy Trust’s Tribal Working Group, which meets regularly with outreach staff and the OPUC tribal liaison to provide input on outreach strategies that will provide greater benefits to tribal customers and increase program participation. (A fifth member of the group is also an employee of an Energy Trust contractor.) In 2023, working group members provided input on Energy Trust’s 2024 budget, established an annual goal setting process and created a group charter.
- Ten people served on the Diversity Advisory Council for all or part of 2023. The council provided feedback on a customer survey’s results and methodology; an equity assessment by the Existing Buildings program; considerations going into Energy Trust’s budgeting for 2024; and Energy Trust’s workforce development activities. Two council members also participated in a hiring panel, grant applications reviews and reviews of proposals for evaluations contracts.

Goal 3: Increase community capacity and investment in BIPOC, low-income and rural communities

Outcomes:

- Energy Trust contracts with a broad diversity of businesses to support our work and represent a variety of perspectives and approaches.
- Our Trade Ally Network reflects a broad diversity of businesses to better serve all of Energy Trust’s customers.
- Energy Trust supports career and business development initiatives that help BIPOC, rural and low-income community members access career development and business opportunities in energy efficiency and renewable energy.
- BIPOC, low-income and rural communities receive focused investments of Energy Trust’s technical expertise and funding resources to ensure programs and services are deployed equitably to all customers.

Metric:

- Percentage of expenditures to subcontractors on contracts over \$100,000 paid to businesses certified by the Certification Office for Business Inclusion and Diversity as a Minority Business Enterprise, Women Business Enterprise, Service-Disabled Veteran Business Enterprise or Emerging Small Business.

Status as of 2023:

- In 2023, 14% of expenditures on prime contracts of more than \$100,000 went to subcontractors certified as Emerging Small Businesses; 16% went to subcontractors certified as Women Business Enterprises; 16% went to subcontractors certified as Minority Business Enterprise; and 0% went to subcontractors certified as Service-Disabled Veteran Business Enterprises.
 - For this period, Energy Trust used certifications from Oregon’s Certification Office for Business Inclusion and Diversity (COBID).

- Under Energy Trust's [supplier diversity policy](#) effective in 2023, contracts to non-COBID firms for more than \$100,000 were required to pay at least 20% of the value of the contract to a COBID-certified firm or firms (including subcontractors). For 2023, 26% of the value of contracts over \$100,000 went to COBID-certified subcontractors.

Goal 4: Increase transparency and accountability

Outcomes:

- Communities and organizations understand how their input and involvement impacts our work.
- Energy Trust is a learning organization where accountability is based on learning from both successes and failures, which are acted on to improve future outcomes.

Metric:

- Energy Trust exceeds its 2023 [Oregon Public Utility Commission performance measure on equity metrics](#).

Status as of 2023:

- Energy Trust exceeded three of the equity metrics and met the remaining one. Activities included above-target spending to support nonprofit organizations serving environmental justice communities and above-target outreach positions focused on reaching environmental justice communities. For more information, see Section III of Energy Trust's 2023 Annual Report to the OPUC.

Goal 5: Deepen engagement in BIPOC, low-income and rural communities

Outcomes:

- Energy Trust has developed the relationships and communication channels needed to continuously understand the evolving needs of communities that have been underserved by Energy Trust in the past.
- Communities have confidence in Energy Trust as an organization that will work collaboratively and in good faith to reach mutual goals, according to the communities' desires and needs.

Metric:

- Number of community engagement activities planned for 2023 and results from those completed engagements.

Status as of 2023:

Energy Trust conducted engagement activities across all sectors and in communities across Energy Trust's service area. These activities focused primarily on communities of color, rural communities and people with low incomes. Many engagements reached a broader range of environmental justice communities including tribes and coastal communities. Of 25 engagements that were tracked in 2023, almost half focused on homeowners and renters, more than a third were directed toward small businesses, and a quarter involved community-based organizations. Many engagements are long-term efforts or involve ongoing collaborations with community-based organizations, while some were on specific projects, events or pilots that have a distinct beginning and end.

Examples of 2023 engagements include:

- outreach to community-based organizations to promote lighting and non-lighting offers available for small businesses
- the Solar Ambassadors pilot that trained members from communities of color to lead educational engagements in their communities
- interviews with community-based organizations enrolled in Community Partner Funding to inform ongoing improvements to existing program offers and new program offers and outreach materials
- engagements with rural communities, Hispanic communities, tribal groups, women and people of color in the design and construction fields, and other community specific initiatives

From staff reflections on 2023 community engagement activities, some common themes were noted. These observations reinforce lessons from prior community engagements and lead to deeper, more nuanced understanding of community needs and priorities. For example:

- Many of the customers, contractors and organizations Energy Trust works with have needs and concerns that are not energy related, and those concerns are often a higher priority for them.
- Collaboration and networking are highly valued among those who participate in engagement events and activities. Sometimes, the connections between organizations and individuals are a significant added value to the participants.
- Culturally responsive approaches and materials are needed to meet and serve customers who have not had full access to Energy Trust programs in the past.
- Awareness, access and trust are critical to serving all eligible customers. In some cases, it is a lack of awareness of Energy Trust. In others, the absence of contractors, and in some cases lack of trust in available contractors, continues to be a barrier for some customers.

Outcomes of community engagements are unique to each activity, as are next steps. In many cases, lessons from community engagement inform continuous improvements to delivery of services. For example:

- Through engagements with Hispanic communities, staff became more aware of cultural nuances such as the importance of family, music and food that led to more effective engagement. These initiatives demonstrated the importance of continuous engagement and Spanish-language resources to build familiarity and trust in Energy Trust. As a result, this team will refine communication strategies, enhance digital outreach and develop more culturally sensitive content.
- Rural engagement activities highlighted unique needs in rural communities and that broad generalizations are problematic and do not address intersectionality of community identity. For example, Southern Oregon – made up of the Klamath Basin, Southern and South Coast regions – encompasses a wide range of people, climates, behaviors and cultural experiences. This understanding points to the importance of targeted outreach and understanding unique regional needs and challenges.