

## Diversity, Equity and Inclusion Goals

*We developed 10 diversity, equity and inclusion goals to improve and enhance offerings for underserved customers. Goals were finalized at the end of 2018, and we will report on progress in 2019 and 2020.*

### **1. Increase customer participation in energy efficiency programs for all underserved populations by 20 percent by the end of 2020.**

#### 1A: Increase residential participation rate by 20 percent in communities of color by the end of 2020.

##### Baseline

- 24 percent participation (50,000 participants)

##### Activities

- Use targeted fixed-price promotions
- Partner with community-based organizations
- Use targeted marketing and outreach
- Expand and promote Savings Within Reach
- Tailor strategies to more effectively reach diverse and rural communities

##### Success Looks Like

- 29 percent participation (60,000 participants)

#### 1B: Increase participation in Existing Buildings program for small and medium business customers and business customers in rural areas by 20 percent by the end of 2020

##### Baseline

- 1.2 percent annual participation for small and medium businesses
- 2.6 percent annual participation for very rural businesses

##### Activities

- Focus on smaller office, retail and restaurants
- Collaborate with industrial sector
- Engage culturally specific business organizations
- Test additional delivery strategies

##### Success Looks Like

- 2019: Leverage current delivery channels to achieve 2019 goals; test strategies to inform 2020 designs
- 2020: Implement new strategies, designs and measures
- Completed projects at an additional 300 small and medium business sites per year; a total of 1,500 small and medium business projects per year; an annual participation rate of 1.44 percent (20 percent increase above baseline annual participation rate)
- Completed projects at an additional 21 very rural customer sites per year; a total of 121 rural projects per year; an annual participation rate of 3.12 percent (20 percent increase above baseline annual participation rate)

#### 1C: Increase customer participation in Production Efficiency for small and medium businesses in rural territories by 20 percent by the end of 2020.

##### Baseline

- 5 percent participation (413 sites)

##### Activities

- Focus cost-effective efforts on specific locations and/or industry types and test customer outreach methods
- Collaborate with commercial outreach activities
- Increase diverse trade allies in focus areas

#### Success Looks Like

- 20 percent participation (82 sites by the end of 2020)
- Achieve cost-effective customer outreach for small and medium rural customers
- Exceed goal

## **2. Increase customer participation in renewable energy programs for all underserved populations by 20 percent by the end of 2020.**

2A: Increase solar projects in low-income, rural and racially diverse communities by 20 percent by the end of 2020

#### Baseline

- 32 percent of 2017 solar projects sited in low-income, rural and racially diverse communities

#### Activities

- Fund 10 solar innovation grants
- Develop new rooftop solar offering for moderate-income homeowners
- Continue low- and moderate-income solar workgroup
- Work with community-based organizations and trade allies on targeted delivery

#### Success Looks Like

- At least 38 percent of 2020 solar projects sited in low-income, rural and racially diverse communities
- Increased awareness of solar by customers in low-income, rural and racially diverse communities, as reported by community-based organizations

## **3. Increase participation in the Trade Ally Network by minority- and women-owned business by 50 percent each by the end of 2020.**

#### Baseline

- Minority-owned business total: 27
- Women-owned business total: 15

#### Activities

- Work with trade and culturally-specific organizations to help build relationships with local businesses
- Increase sponsorships of applicable events
- Hold small outreach and networking events throughout the state

#### Success Looks Like

- Minority-owned business total: 41
- Women-owned business total: 23
- More minority- and women-owned businesses in Energy Trust's Trade Ally Network
- Mutually beneficial relationships with minority-owned and women-owned contractors

## **4. Increase the number of projects completed by minority- and women-owned trade allies by 15 percent by the end of 2020.**

#### Baseline

- 775 projects completed by minority-owned businesses to date

- 375 projects completed by women-owned businesses to date

#### Activities

- Leverage campaign ally offering to provide targeted incentive throughout service territory
- Collaborate with program field staff
- Re-engage existing allies with low activity

#### Success Looks Like

- 891 projects completed by minority-owned businesses to date
- 431 projects completed by women-owned businesses to date
- Increased customer participation in areas that have been underserved
- Mutually beneficial relationships with minority-owned and women-owned contractors

### **5. Increase the number of contracts executed with minority- and women-owned businesses by 15 percent by the end of 2020.**

#### Baseline

- 48 contracts with contractors identified as diverse in our contract system from 2016-2018

#### Activities

- Identify minority- and women-owned providers of services and supplies
- Focus on catering and professional services first
- Build central reporting resource to enhance access and visibility of active diverse contractors

#### Success Looks Like

- Contract with 56 new diverse contractors by the end of 2020
- Increase engagement with minority-owned and women-owned business to increase service and supply connection with a wider community

### **6. Increase overall market awareness and understanding of underserved populations through the engagement and deepening of relationships with 50 culturally specific/culturally responsive organizations (such as community-based organizations, municipal agencies, membership organizations) by the end of 2020.**

#### Baseline

- 80 existing relationships with organizations

#### Activities

- Map relationships
- Meet with organizations
- Seek opportunities to learn and work together
- Develop internal systems to coordinate and support relationship building

#### Success Looks Like

- 25 new relationships and 25 deeper relationships with organizations

### **7. Increase the diversity in recruitment and hiring of employees by 25 percent by the end of 2020.**

#### Baseline

- 8/107 or 7.5 percent of staff identify as people of color

#### Activities

- Partner with staffing agencies that emphasize diversity

- Build partnerships with community-based organizations
- Partner with diversity, equity and inclusion focused consultants

#### Success Looks Like

- Increase diversity of staff and applicants to be more reflective of Portland demographics (28 percent of Portlanders identify as non-white)
- Increase the diversity of hires by at least 25 percent; build a pipeline for continued increased staff diversity

### **8. Develop systems and support needed to collect, track, analyze and report demographic information related to program participation, program delivery and trade ally network members by the end of 2018.**

#### Activities

- Develop methodology and select data sources for data analysis in 2018
- Create diversity, equity and inclusion data, baseline and participation analysis report in 2018
- Update analysis in 2019 and 2020
- Explore alternative data sources and collection strategies

#### Success Looks Like

- Data, baseline and participation analysis is used to refine diversity, equity and inclusion goals and track and report progress to achieving those goals

### **9. Based on the Intercultural Effectiveness Scale survey, increase cultural responsiveness of all staff and board of directors by 20 percent by the end of 2020.**

#### Baseline

- Results of Intercultural Effectiveness Scale survey in 2015

#### Activities

- Implement recommendations from 2015 Intercultural Effectiveness Scale survey
- Re-administer the survey
- Offer cultural responsiveness trainings
- Host book club and article/film discussions
- Host learning opportunities such as the Fair Housing Council of Oregon Bus Tour

#### Success Looks Like

- Energy Trust has improved employee retention
- Energy Trust is more culturally responsive
- Energy Trust is more inclusive

### **10. Increase transparency and community engagement by publishing the Diversity, Equity and Inclusion Operations Plan and progress toward its goals.**

#### Activities

- Report on goals and progress in quarterly and annual reports to the OPUC
- Create website content, print materials, reports and presentations
- Ensure regular and consistent communication to internal and external stakeholders
- Help staff track on progress
- Explore other mechanisms for reporting

#### Success Looks Like

- Internal and external stakeholders are aware of and informed of Energy Trust's diversity, equity and inclusion activities, goals and progress to goals